WHAT ROLE SHOULD RESEARCH PLAY
DURING AN ECONOMIC CRISIS?

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INTRODUCTION: -Analysis of the economic crisis by the social sciences

We may wonder why people engaged in market research have waited so long before undertaking a critical assessment of the consequences of the economic crisis on the future of market research. One hypothesis which comes to mind is that of the scholar isolated in his ivory tower, unable to understand the manager's point of view and to furnish relevant information within the time limits necessary for action. But we reject this classical and popular hypothesis in favor of a more constructive one, which consists in recognizing the right of the market researcher to a certain period of reflection for the observation and analysis of the crisis. In other words, a certain amount of time is needed for the understanding of an economic, social and cultural change whose effects are not yet controlled by either the social-scientist analysts or the decision-makers in both the private and the public sectors.

Purpose, methodology and outline of this study

The aim of this paper is to indicate a path different from that shown in previous studies done on the economic slowdown, taking into account the real changes which have occurred in the field of advertising research, and notably in the relationship between agency and advertiser.

Our methodology consists of an analysis of the current situation, complemented by an exploratory study conducted through in-depth interviews with a sample of experts, i.e. professional researchers: fifteen employed by advertisers, and eight by advertising agencies. They were chosen from certain sectors affected by the crisis, such as paper products, foods and household equipment, or from sectors, such as banking, whose advertising budgets are tied to "hot" products. We wish to thank all the professional researchers who agreed to be interviewed, and above all the market researchers, members of the U.D.A., who answered our questionnaire on the crisis.

I. THE INFLUENCE OF THE ECONOMIC CRISIS ON THE WORK METHODS OF ADVERTISING AGENCIES

a) The traditional relationship between advertising agencies and advertisers, and the role of research in advertising campaigns

Up until 1973, most advertising agencies formalized their work method in order to create greater efficiency in their productions. For instance, the DUPUY-COMPTON agency proposed the I.B.I. method, LINTAS-PARIS the Thibaud project,
and OGILVY-MATHER developed the "how-to-create-advertising-that-sells" method. All these systems adopted an identical approach in their development of campaign projects. They took into account three or four essential stages during which research is used, in order to eliminate, insofar as possible, any uncertainty:

1) The working out of brand strategy by the advertiser
2) The discussion of this strategy by everyone involved, in order to reach an agreement on marketing and advertising objectives
3) The development of a message strategy
4) The choice of media and other advertising vehicles

What strikes us in these traditional methods of full-time agencies is their desire to establish a distinct separation between the responsibilities of the agency and those of the advertiser. The detergent companies, for example, who are considered masters in the art of working with their advertising agencies, carefully delineated each participant's responsibilities and field of competence in research matters. Each individual's tasks were defined in advance, in writing, in order to avoid unnecessary expense and to maximize productivity.

An example is COLGATE-PALMOLIVE, which each year sends to its agencies a written directive, including an evaluation of achievements and, of course, the research programs. The agencies must carry out concept studies and post-tests, under the advertiser's supervision, to measure the effectiveness of their campaigns. The agency must analyze all information presented in the brand strategy, and "select the most significant elements from an advertising point of view". The agency research department will thus be directly involved in this phase of critical analysis.

According to this traditional method, the research department of an agency devotes itself entirely to creation. During the 1960's, there was therefore a progressive decrease in the responsibilities of the agencies in the organization of advertising campaigns. They did not participate directly in the definition of marketing objectives; they were simply there to be consulted whenever the product manager deemed it necessary. Their role was thus limited to procuring media space and good will.

b) The economic crisis and inflation of advertising costs

The energy crisis has not spared the advertising agencies.
In fact it has hit them much harder and earlier than most research companies. This is not surprising, as marketing analysts have long observed that advertising budgets are closely linked to business fluctuations (5). The 1973 recession confirmed the existence of these Malthusian reflexes in powerful international advertisers such as CHRYSLER, ELF, ESSO-STANDARD, COLGATE-PALMOLIVE, L'OREAL and MARS.

One can observe a reduction, under these conditions, in the growth rate of the advertising agencies' revenues, which remained lower than the retail price index: + 4% in 1974 as compared to 1973, + 3.5% in 1975 as compared to 1974. In terms of constant value, these figures correspond to a significant decrease of about 8%.

**TABLE I**

**EVOLUTION OF TURN-OVER OF ADVERTISING AGENCIES FROM 1960 TO 1974**

The amounts shown are before taxes

<table>
<thead>
<tr>
<th>Turn-over of advertising agencies (millions of francs)</th>
<th>1960</th>
<th>1961</th>
<th>1962</th>
<th>1963</th>
<th>1964</th>
<th>1965</th>
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</thead>
<tbody>
<tr>
<td>2000</td>
<td>2300</td>
<td>2500</td>
<td>3010</td>
<td>3250</td>
<td>3500</td>
<td>3830</td>
<td>4130</td>
<td>4300</td>
</tr>
</tbody>
</table>

| 10 | 15 | 9 | 20 | 8 | 8 | 9 | 8 | 4 |

Source: Stratégics, n° 140, 16-30 May 1977, p.47

The net profit (an average 9.3% of the gross income of the agencies) was only 6.9% in 1973 and 5.9% in 1974. The large
agencies were struck the hardest, notably LINTAS, McCANN, and PUBLICIS.

They were obliged to lay off many of their employees in 1974, and again in 1975, in order to regain financial stability and obtain a satisfactory profit-margin. Thus the 25 best-known agencies laid off almost 470 people in 1975, or slightly over 14% of their employees.

TABLE II

| EVOLUTION OF THE PERSONNEL OF SOME ADVERTISING AGENCIES BEFORE AND AFTER THE CRISIS |
|---------------------------------|-------|-------|-------|-------|-------|
| ALEXANDRE CONSEIL               | 75    | 71    | 35    | -     | 18    |
| BENTON & BOWLES                 | 81    | 71    | 47    | 40    | 36    |
| DORLAND & GREY                  | 136   | 138   | -     | 114   | 108   |
| DOYLE, DANE, BERNBACH           | -     | 105   | 78    | 85    | 83    |
| DUPUY-COMPTON                   | -     | 185   | 145   | 113   | 105   |
| LINTAS-PARIS                    | 175   | 155   | 135   | 125   | 131   |
| Media and Research              | (27)  | (25)  | (8)   | (7)   | -     |
| McCANN                          | -     | -     | 80    | 103   | 121   |
| PUBLICIS                        | 630   | 459   | 380   | 347   | 345   |
| Media and Research              | -     | -     | (58)  | (48)  | (46)  |
| SYNERGIE                        | 132   | 110   | 104   | 103   | -     |
| Media and Research              | (16)  | (15)  | (15)  | (12)  | -     |
| TED BATES                       | -     | 130   | 118   | 125   | 116   |

Source: Agences, Stratégies, Paris.

A recent A.A.C.P. survey of about sixty advertising agencies shows that the position of researcher is disappearing from the organization chart, the documentalist position is gaining in importance, while the positions of research manager and assistant research manager are showing a decrease in number.

But advertising research has also been indirectly affected by the crisis, through the transformation of traditional methods of data collection (8).

c) Increase in the cost of data collection, and the setting up of other work methods

There is a progressive tendency to replace the home interview...
with telephone surveys, mail questionnaires, interviews at store exits, or group discussions. Today, most post-tests of televised films are carried out by telephone. Awareness tests are often carried out by mail; creativity sessions using projective techniques have been very successful for studying the positioning of a product, the development of hypotheses, and identification of advertising concepts.

But these creative techniques, when carried out in a haphazard way, hold serious risks which have led to failures in advertising strategy, as for example in that of ALA, DEDORIL and FRAM.

In France today, as in the United States, the telephone cannot be used as a means of obtaining a representative sampling on a national scale, and some types of question do not receive a valid answer (3).

Mail surveys, which have been developed because of cost inflation, bring in only a small response unless the procedure is carried out with samples who have previously agreed to participate in the project. But in the latter case, the sample group is liable to be biased. Interviews conducted at store exits are based on the implicit assumption that the customers of these stores are representative of the actual or potential buyers of the product. In fact, the store usually has a particular image and a particular sort of clientele, and the sample necessarily excludes anyone who is too busy to stop and talk to the interviewer. As for creativity sessions, they have the drawback of being limited to those people who are willing to participate in them.

Thus cost inflation encourages the agencies to seek substitutes for traditional methods of data collection, and advertisers therefore are unable to obtain representative cross-sections of those segments of the population with which they seek to communicate.

This is why today's researchers base their analyses on two essential factors: the emergence of the modern consumer, and the appearance of the demarketing concept.

II. THE ROOT CAUSES OF THE TRANSFORMATIONS IN ADVERTISING RESEARCH: THE EMERGENCE OF THE MODERN CONSUMER

Because of the economic crisis, numerous products such as petrol, detergents, tobacco, automobiles, packaged foods, and beverages must cope not only with the shortage of raw materials, but also with widespread consumer awareness and protest among various socio-economic groups.
Thus environmentalists, sensitized by the warnings of the Club of Rome about the inevitable limits to growth, denounce the negative effects of the increase in these products: urban congestion, destruction of the environment, deterioration of health and sanitary conditions, and pollution of our culture by the advertising institution (12).

The consumer-protection movement reinforces the environmentalist protest-groups by demanding truth in all aspects of marketing: price, the product, presentation at the place of sale. It is for this reason that there has been a decrease in advertising budgets.

Governments have passed regulatory measures restricting the advertising activities of "hot" products. Gasoline advertisements have been forbidden in France since 1974. ESSO was forced to abandon an international campaign because of constraints imposed by European governments.

French television, which is subject to government censorship, does not accept advertisements for numerous products.

Simultaneously, there has been a disturbing expansion of anti-advertising sentiment in Europe. The number of people opposed to advertising is much greater than in the United States (2). A recent survey conducted by the Common Market showed that 72% of the population of the Common Market countries thinks that advertising is often misleading about product quality (15).

In this context, the transformations in market research are based on a more fundamental concept, which we shall now examine: the concept of demarketing.

III. THE BASIS FOR THE TRANSFORMATION OF MARKET RESEARCH: THE CONCEPT OF DEMARKETING

a) The main objective of marketing: a more streamlined administration of resources

In future, advertisers and their agencies must take into account in their marketing projects not what they can produce and sell, as in the traditional scheme of the 60's, but rather what it is desirable to sell, from the consumer's point of view. We are at present in a transition phase between an affluent age marked by active policies of differentiation of brands, and a post-industrial society characterized by a scarcity of resources. In this awkward stage, the main objective of marketing is to adapt its products to the needs foreseen by the market.
The market research executives whom we questioned all agreed on one point: these hot products are affected by the crisis, the reality of which can be proven by three signs:

- the annual increase of consumption per household is inferior to the degree of demographic growth;
- distributor-owned brands (especially CARREFOUR) are making spectacular increases in sales;
- the consumer's behavior is changing: he is less ostentatious, more conservative in his tastes, and manifests an interest in simpler, more economical and more durable products (7).

The French detergent market illustrates these changes brought about by the crisis, as we can observe a decrease in annual consumption by households, a remarkable increase in sales of the "free" detergents of CARREFOUR, as well as a modification in the behavior of housewives, who seek a more economical use of detergents.

Thus, for all firms, the challenge of the 80's can be summed up in one sentence: how can we develop, how can we improve our segment of the market in a low-growth or zero-growth economy? Here we must remember the specific characteristics of the present economic crisis.

It has taken completely by surprise a great number of advertisers, who were not prepared to cope with it. It has lasted longer than the preceding crises. It is universal, in the sense that it affects all the elements of the marketing-mix, and calls for a coordinated response from both advertiser and agency (11). In a changing environment, the concept of marketing must also change. The main goal of the firm, in a no-growth economy, is a more streamlined administration of its resources and, within these restrictions, a rearrangement of the different elements of the marketing-mix. This readjustment corresponds exactly to the concept of demarketing.

b) The concept of demarketing and the rearrangement of marketing decision variables

This concept emphasizes marketing-mix variables other than advertising, such as price, quality and promotion at the place of sale. The reduction in advertising budgets can also be explained by the advertisers' keen awareness of the diminishing power of advertising to communicate effectively.

This phenomenon can already be observed in the United States, where the score of memorization of television ads fell from 100 in 1960 to 52 in 1969. The scores of impact have also
decreased in France: the average best proven score was 33.9% in 1975 and 32.8% in 1976. This relative decrease can be explained by the proliferation of brands, and by the gradual lessening of consumer brand-loyalty. During semi-directive interviews, company executives clearly showed an interest in the market first, then in the product, and finally in distribution and operations at the place of sale. Advertising was more or less subordinate.

In the context of the economic slowdown, this is not surprising: the management of resources is more important than communication. Advertising aims only at creating a brand or corporate image. It is thus seen by managers as a psychological variable, which the advertiser can neglect in favor of economic variables: price, product and place of sale. Thus the long-term objectives are left aside in favor of short-term objectives: since selling is the principal aim, the principal action takes place at the sales outlet; margins and profits must be maintained, and a quality product offered to the consumer.

Advertising, which by its very nature conflicts with this attitude, can be temporarily rejected in order to cope with the difficulties of survival. This is why priority is given to existing products rather than to the introduction of new products.

The advertiser realizes that the introduction of new products is more likely to fail than succeed (17). There has not been a large-scale launching of a new product on the French detergent market for five years.

Most advertisers spend a great deal of time analysing existing products, deciding which brands should be eliminated, redefining market segments, and transferring to new markets the capital of good will already acquired by the brand. Since introducing FRUIT D'OR, UNILEVER has limited itself to diversification activities with ASTRA salad oil and PLANTA margarine.

There is, in the challenge of the Eighties, a pitfall which must be avoided by those in charge of marketing, who will be tempted to question the usefulness of market research, considering it a luxury reserved for times of growth and prosperity. It should be understood that it is not research itself that should be put into question, but rather the conditions of its application in today's brand strategies. Without exception, all the advertisers whom we questioned recognized the vital necessity for firms to keep in
contact with the consumer in order to adapt themselves to a changing environment. This adaptation takes the form of displacing the center of interest of the advertiser towards the product, price and place of sale. We must analyze more precisely the new priorities in market research, imposed by the economic slowdown.

c) The new priorities in market research

The product tests, whatever their design (blind test or as marketed, "monadic" or paired tests) still maintain their importance. As one advertiser we interviewed indicated, the golden rule in marketing food products is not to change the product, whatever the current economic situation may be. Product tests are therefore essential for any brand strategy which hopes to progress in a period of recession and crisis. They are also the advertiser's best possible response to consumer demands.

Conjoint measurement analysis or trade-off techniques also answer the needs of today's advertisers, who wish to discover the effects of a product's various physical or economic features on the consumer's decisions. The combination of these techniques with market segmentation brings about a considerable improvement in brand performance within a product class, and the identification of potential need for a new brand (9).

Surveys of brand image, consumer opinion on these brands, and patterns of use are all particularly useful for assessing behavioral changes of the consumer, thus enabling advertisers to take any necessary corrective measures and to be forewarned of any influences on the consumer in a given market (13). Manufacturers of detergents, or of toiletries -- such as L'OREAL -- systematically set up this sort of brand barometer once or twice a year.

Sales tests, display tests and analyses of purchase behavior in stores have multiplied during the economic slowdown. Advertisers' growing interest in these types of survey can be explained by the crucial importance of the place of sale, due to an acceleration of the concentration of distribution, and the spectacular progress of distributor-owned brands. On the other hand, test marketing, which was quite successful in France during the 60's (due primarily to the detergent manufacturers' influence), has now fallen into disuse. Today test marketing is being replaced by either mini-market tests, widely used in England (14), or by preference and market prediction models, such as ASSESSOR, which are adopted by leading advertisers in France and the United States.
These new techniques enable one to avoid the two major drawbacks of test marketing: their cost is estimated at $40,000 - i.e. only 5% of the cost of test marketing ($800,000); they are quicker, since mini-market and ASSESOR tests take only three months instead of the twelve months required for traditional testing methods. Test marketing has other serious disadvantages: competitors are immediately informed of it by their sales force, and consequently can put into effect means of dissuasion which can invalidate the operation at the local level. Moreover, whether or not national significance can be extrapolated correctly from test marketing results remains the object of controversy (17). According to Nielsen, the comparison of results a year after a new product has been launched on the national market is accurate in only one out of two instances.

As a result, economic slowdown in conjunction with inflation has undoubtedly modified the marketing concept of advertisers. They seek primarily to maximize profits on existing products, and introduce fewer new products, in hopes of reducing their risks.

This situation brings about a modification in the concept of market research: it is becoming more tactical than strategic, more functional and therefore more realistic. Although cost inflation might seem to be one of the main obstacles to carrying out on-the-spot surveys, it is in fact a positive factor, and even favorable to the quality of the design of research studies. The crisis has had a profound and beneficial impact on brand managers' attitudes towards market research.

Gimmick surveys and gratuitous experimentation with new techniques "just to see" are much less frequent today than in the past. The company market research manager of today is more involved in the designing of research studies than he was five years ago: it is not unusual for him to work out the methodology, leaving the outside office with only field work and data processing to do. The agency research department heads whom we questioned all agreed that surveys conducted for the purpose of reassurance are disappearing. Managers are putting more faith in their own common sense and, finally, in the experience they have acquired through long familiarity with their products and markets.

IV. THE PRACTICAL IMPLICATIONS OF THE DEMARKETING CONCEPT IN ADVERTISING RESEARCH

This minimizing of the advertising variable in the advertiser's marketing-mix might suggest a decline in advertising
research (18). Strictly speaking, the only real justification for such studies would be their contribution to the creative process.

Such a belief, however, is based on an erroneous reading of the lessons of the crisis. Advertising research per se should not be put into question, but rather the way it has been conceived in the traditional work methods of the large full-service agencies. The crisis thus transforms advertising research, both in its very concept and in the priorities assigned to techniques, even more radically than it does market research.

a) The new concept of advertising and research

This concept appears primarily in connection with "hot" products, those widely criticized both by environmentalists on the basis of their harmful effect on the quality of life, and by consumerists in the name of consumer protection.

Sometimes this opposition to a product takes the form of a criticism of advertising (1). This opposition to the product itself, camouflaged as an attack on advertising, is one of the biggest challenges managers must meet in the 80's if they hope to counter the resistance of increasingly well-educated and socially conscious consumers (6).

Therefore, in conjunction with the concept of demarketing, there exists a new concept of advertising, which takes the social aspirations of the consumer into account in order to better communicate with him.

The task is no longer simply one of choosing a campaign strategy, checking the results of the last campaign, and selecting media vehicles by means of a computer, according to a predetermined target. This approach is too narrow, neglecting as it does the larger socio-cultural environment in which the product is to be used. We must go further in the direction of reflection; the agency must integrate the advertiser's communication strategy into a more universal one which takes into account the socio-cultural environment of the product. The criterion of excellence of the agency of today is not its size but its professionalism, in other words, its capacity to think clearly and intelligently about the strategic problems of advertisers, who are bewildered by the new consumer (16).

This situation imposes new priorities in agency research, which we shall now examine before concluding with a discussion
of the new form of dialogue which is arising between advertiser and agency.

b) The new priorities in advertising research

The leading French brands, such as ARIEL and SKIP in detergents, and LOTUS in toilet paper, have consolidated their positions during the economic crisis, whereas less well-known brands have been severely affected by the offensive of distributor-owned brands. This fact tends to prove the decisive importance of the positioning of the brand, or how it is viewed by the consumer, in a time of economic slowdown. Henceforth, the new priority in advertising research can be summed up thus: HOW TO DEVELOP NEW METHODS OF FINDING NEW WAYS TO COMMUNICATE WITH THE CONSUMER?

One of these new methods, widely used in the United States and Europe, is the study of life-styles and socio-cultural trends (20). During an economic crisis, positioning is crucial, as it affects only the creative content of the message, and does not bring about a budget increase, i.e. an increase in advertising pressure (4). This sort of technique is thereby perfectly suited to a period of economic slowdown. The new advertising man has committed himself to this trend, making notable changes in basic claims of brands, arguments supporting these claims, selection of brand image, campaign tone, and choice of media, in order to adapt to the new consumer's expectations.

Thus was the "recentering mentality" used extensively in the advertising of CREDIT AGRICOLE ("Come Back to Common Sense!") and PREFONTAINES wine ("Count on the Simple Things"), while B.N.P. and HERTZ aimed at a clientele with a spirit of adventure.

The assigning of priority to brand positioning in a given socio-cultural environment can also be applied with more banal products, such as household cleansers. A typical example is that of VIGOR.

c) The VIGOR case

VIGOR was originally sold in the non-distributive trade. Following product tests, UNILEVER decided to introduce the brand into the large distributive trade. The quality of the product, in terms of its effectiveness, is comparable in the consumer's opinion to that of its competitors, notably AJAX, the top brand on the market, and SPIC, a challenger.

The product was successfully launched in the distributive
trade in 1970, and since 1973 its positioning has been progressively modified to take the new consumer's expectations into account.

TABLE III

THE EVOLUTION OF VIGOR'S COPY STRATEGY

<table>
<thead>
<tr>
<th>Year</th>
<th>Expectations of the housewife</th>
<th>Basic promise</th>
<th>Supporting evidence</th>
<th>Tone of the campaign</th>
</tr>
</thead>
<tbody>
<tr>
<td>1971</td>
<td>Beauty of housekeeping and floor quality</td>
<td>VIGOR, industrial cleaner for floors</td>
<td>Industrial cleaning product for a specific purpose</td>
<td>Factual, informative</td>
</tr>
<tr>
<td>1973</td>
<td>Simplification of household chores</td>
<td>VIGOR, industrial product for the home</td>
<td>All-purpose industrial product</td>
<td>Slightly less informative</td>
</tr>
<tr>
<td>1976</td>
<td>An all-purpose cleaner</td>
<td>VIGOR, household cleaning product</td>
<td>Rejection of industrial argument as too masculine</td>
<td>Still less informative</td>
</tr>
</tbody>
</table>

V. TOWARDS A NEW FORM OF DIALOGUE BETWEEN ADVERTISER AND AGENCY

By forcing the advertiser to improve on the profitability of his budget, a phenomenon demonstrated by our in-depth questioning of representative professionals, the crisis has imposed two new trends in research. First, today's advertiser must get to know his public better, in a more personal and more authentic way. New research techniques such as "life-styles" answer this need. Their effects are already clearly visible (19).
The second trend is towards improved targeting of com- munication, based on consumer segmentation. Traditional socio- demographic criteria are becoming too simplistic, and it is increasingly necessary to introduce new qualitative elements linked to life-styles.

By obliged the advertiser to seek a closer alliance with his advertising partners in the face of a common attack, the crisis has brought about a new form of dialogue. The functions of research are evolving. Agency research-department heads are becoming strategists of communication, bringing a high standard of thought and reflection to the agency and its clients, and participating in all important decisions in all aspects of advertising communication (10).

This trend challenges the traditional setting apart of the agencies, with agency and advertiser often in conflict. In the traditional scheme, the agency's head of research played the role of diplomat, smoothing over the constant rivalry between idea-men and account executives, or defusing tensions generated by campaign orientations.

In contrast to the traditional agency, which usually skimmed over problems linked to distribution, the agency of the Eighties will have to take into account all of the advertiser's activities which could have an impact at the place of sale.

It will also play a greater part in the designing and use of market research. Certain agencies have even set up a network of survey-conductors in order to enable their clients to renew their copy-strategy. As a result, the distinction between commercial research (the advertiser's) and advertising research (the agency's) is becoming increasingly blurred. For both, it is less a question of inventing new research techniques than of making more creative use of those already in existence by better combining quantitative and qualitative techniques.

The best means of serving the advertiser, of offering him realistic solutions, is to know the field well and to cope creatively with the problems posed by the new consumer. This is the real challenge, at once modest and ambitious, for the researcher of the 1980's.
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