

A Taxonomy and Assessment of Current Market Research Conferences in North America

A Bayesian Approach to Modeling the Conference Selection Dynamic

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Responses to this article were written by
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Do you find this issue's column title impressive? Ostentatious? Incomprehensible? Your answers (multiple responses allowed) will indicate which conferences you should, and should not, attend. I'll explain further down.

Marketing research conferences can be divided into two broad classes: Vacuous and Substantive. Please note I've excluded invitation-only conferences from this taxonomy. I've also excluded seminars and workshops.

Almost all marketing research conferences in North America fall into the Vacuous class. This includes every conference sponsored by companies whose primary business activity is sponsoring conferences and most conferences sponsored by anybody else.

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Why are Vacuous conferences so popular? Same reason as focus groups: They're easy to understand and there's always free food. The purpose of these conferences is not education, it is networking. Vacuous conferences are giant, costly cocktail parties. Vendors glide through the crowd like sharks smelling for injured fish, seeking any opportunity to pass out a business card. Corporate researchers, especially young ones, wander in wide-eyed and excited, hoping to learn something and/or meet someone who might help their careers. The speakers, almost always corporate clients (vendors willing to pony up expensive exhibitor fees sometimes sneak onto the agenda, too), prepare entertaining, colorful presentations that showcase their marketing acumen with

the intent of dressing up their resumes and perhaps meeting someone who might eventually help their careers. Of course, standing up in front of a large group of your inferiors and pontificating isn't bad for the ego, either.

And for everyone, a three and a half star hotel, some nice weather in February, several dinners at excellent restaurants, lots of cocktails and a few days out of the office, all on the company tab. And don't forget the frequent flyer miles. Could be worse.

The brochures do try to give the impression that you're going to learn something but rarely is anyone fooled. Those that are fooled, like I was early in my career, quickly realize these are not my kind of conferences, or perhaps more precisely, that I'm not their kind of attendee, and move on to the other conference genre: Substantive.

The class of Substantive conferences in North America includes two that I would like to contrast here: the Sawtooth Software Conference, held every 18 months and the AMA's Advanced Research Techniques Forum, aka, the ART Forum, held annually.

Sawtooth Software, as their name implies, is a software company. They author the leading conjoint software in marketing research, as well as other products. Although it would be in their short-term best interest to showcase their products at this conference, the opposite is actually true. The conference gives highest priority to papers using non-Sawtooth techniques. The intent of the conference is to educate. Each presentation must be designed so that there are some useful takeaways for each person attending the conference, regardless of experience and education. That means the presentation has to be basic enough for beginners and advanced enough for award-winning PhDs. Each presenter is required to provide a journal quality paper as well as the presentation deck. Each accepted submission is assigned a supervisor who reviews the presentation in draft form and makes suggestions to insure both the final presentation and paper are appropriate for the audience. It is a major effort and not all presentations/papers are successful. But most are. The intent of the conference is to present original research that is relevant to both the practitioner as well as academic communities. The conference occurs every 18 months rather than annually because, among other reasons, Sawtooth has found that from Call-for-Papers to publishing conference proceedings is well over a year cycle. Good research sometimes takes longer.

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The ART Forum is, on the surface, similar to Sawtooth. According to the AMA website, "Experienced research practitioners who use advanced methods in their jobs comprise the largest segment of [ART Forum] conference attendees." I believe that the ART forum was originally designed to disseminate academic ideas to practitioners, and provide academics with practical problems for which they could develop better solutions than currently practiced. It was a forum for two-way communication between the two communities. Both sides benefitted.

I remember attending ART Forums where I came home with a head swirling with new ideas, excited to investigate some new technique or variation. Recent ART Forums, at least for me, have been filled with inscrutable presentations that wouldn't be relevant to my practice even if I understood them. The fact that the ART Forum does not publish papers to support the presentations makes the presentations even more difficult to comprehend. There is no opportunity to review carefully, slowly and repeatedly the complex analysis presented verbally.

A typical ART Forum presentation nowadays, seems to follow this script: 1) pick a very specific consumer behavior, eg, buying high-end fleur de sel from online gourmet retailers using a smartphone, 2) hypothesize a mathematical model to describe that behavior (note: it is critical that this model differ from any other model ever specified), 3) display a screen full of Greek letters that allegedly define the model,

4) state during the presentation that the model is extremely straightforward and quite easy to estimate, 5) take several months or years to estimate the model, 6) present findings that show this custom-coded model performs better than current alternatives and 7) select a paper title that rivals that of this column for pomposity.

Exactly who would find this relevant, useful or even interesting? To be honest, I know there are some brilliant minds on both the academic and practitioner sides that do find these presentations interesting. Maybe even relevant, although that's harder for me to imagine. But I also know that's a very small group. And I know I'm not in that group.

It seems to me that someone needs to admit that the ART Forum has gotten too academic. I'm not smart enough for today's ART Forum. And I think enough of myself to believe that if I'm not smart enough, there are a lot of other researchers who aren't smart enough, either. I think the ART Forum is playing to an ever-dwindling audience. It is in danger of becoming irrelevant, at least to practitioners.

Now back to my title. If you understood what it meant and thought it was impressive, you should attend the ART Forum. You might learn something you find interesting. If you didn't understand it but you thought it was impressive, you should still attend the ART Forum. You won't learn anything at all but you can brag to all your friends and clients that you attended. If you understood this column's title but thought it was laughingly pretentious, then the Sawtooth Software Conference is your best bet. You'll return home a better researcher than you left. And finally, if you simply had no idea what any of those words meant, just about any of the Vacuous class conferences will do (remember to wear your name tag at all times).

Finally, for the careful readers who realize something promised by the title is still lacking, let me add this: review your answers to the question in the first line of the column. If you would answer differently now, change your answer, reread the column and repeat until the answers converge. A simple man's Bayesian model.

The author would like to thank Greg Allenby and William D. Neal for their responses to this article.

The Neal and Allenby responses have been included in this paper (page 4-8)

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Response to “A Taxonomy and Assessment ...” by Dick McCullough

By Greg Allenby

Dick McCullough makes some great points. I, like him, have been a regular ART Forum attendee for 20 years, and have also attended a number of Sawtooth Conferences. We both come away from these conferences with new ideas, our careers have benefited from the people we’ve met, and we’ve gained much from the opportunities given to us to present our work. We count many people who attend the ART Forum as our friends, and we look forward to seeing them each year. The ART Forum is my favorite conference.

I think what Dick senses can be chalked up to the natural course of events. Each of us is trained with a set of skills that are popular at the time we went to school, and, as time goes by, new techniques, perspectives, data and problems come onto the scene. Every seven or eight years (the time needed to get tenure) brings with it a new generation of thinking and problems. I, along with many others, helped to popularize Bayesian methods in marketing in the 1990’s, and the field of marketing is now on to new methods and new problems. Things that are popular now are social networks and structural economic models, and these problems are not necessarily tackled with the help of Reverend Bayes. As the latest shift occurred, I noticed myself grouching that those youngsters just weren’t working on interesting problems – i.e., I mean, who would actually use that stuff? I was beginning to sound like Dick.

Each year, the AMA Research Council appoints a chairperson to oversee the ART Forum conference. And, each year, the chair assembles a committee of academics and practitioners to develop the conference program. The chair is always looking to add new people to the committee to welcome and include the new generation of thinkers and doers, and the charge is given to assemble a program that reflects three things – rigor, relevance and emerging topics.

Academics love rigor. Developing variables and models that are good for understanding consumer behaviors is what drives us. We want to think deeply about how variables come together to prompt purchase, how decision options influence choices, and how firms might leverage this knowledge to their advantage. We love to drill deep wells.

Practitioners love relevance. They want to be useful in today’s world for many reasons, including the ability to get paid. They have a keen sense for important problems and have the greatest understanding of why academic theories don’t work. Because practitioners work at the point of application, they have the most to contribute to the development of new theories. Practitioners are the ones who tell us academics the well is dry and its time to move on, much as Dick is doing in article. This is one of the benefits I get from the ART Forum – I learn what makes practitioners frustrated with us.

Everyone loves emerging topics. We all like to think about new data, new models, new methods of estimation, and new approaches to exploring implications of our analysis. I know that many of the emerging ideas presented at the ART Forum won’t work out, and I gain much from confronting myself with ideas that bring me to new fields of exploration.

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Balancing the mix of rigor and relevance in both old and up-and-coming topics is a difficult task for the ART Forum program committee. It is especially difficult when balanced against the need to develop the next generation of academics and practitioner who will be the future leaders of the field. Looking back on my early years with the ART Forum, I remember legendary characters such as Bill Neal, Rich Johnson and Jordan Louviere guiding the content and the discussion at the conference. These individuals had a perspective, wanted to articulate it and were outspoken about what was relevant. They were also very welcoming and encouraging to me, helping me to develop as an academic interested in applied problems.

I agree with Dick that the ART Forum needs to elevate the banner of relevance while continuing to hold onto rigor and emerging topics. This is a difficult task, one that requires a sustained effort over an extended period of time. My suggestion to the AMA is to consider a three-year program committee made up of practitioners and academics with track records reflecting rigor and relevance, plus an appreciation of emerging topics. There needs to be balance among these factors, along with the desire to develop the next generation of leaders. I believe that the movement to a multi-year committee would better allow for the balance needed to satisfy all attendees while ultimately leading to new marketing thought and practice.

A TAXONOMY AND ASSESSMENT OF CURRENT MARKET RESEARCH CONFERENCES IN NORTH AMERICA: A BAYESIAN APPROACH TO MODELING THE CONFERENCE SELECTION DYNAMIC: A RESPONSE AND CLARIFICATION

William D. Neal

I certainly enjoyed reading Dick McCullough's editorial and I am in total agreement with almost all of his points. Been there, done that, over and over and over again.

I do think there are a few exceptions to his taxonomy, most notably the annual MRA conference, where there is a very healthy blend of activities of both the selling and networking type and of the substantive learning type. But in general, he is right on the money.

Initially, I planned to respond to Dick's article with a dissertation on the growth, progression, and death of research conferences in North America and their impact on the marketing research community. But that quickly got too long and far too boring. So I will just cut to the chase – what went wrong with the ART Forum?

In a nut shell, as Dick so bluntly stated – it has lost its relevance - at least its relevance to practicing methodologists. Before going on, I need to disclose that I have not attended an ART Forum for many years. But, I do study the conference brochure in detail each year and weigh the potential gain with the potential pain. The pain has been winning out for many years now. However, this last conference showed a lot more potential gain than previous ones, and I would have attended if not for a prior engagement.

The original ART Forum had a dual mission:

1. Bring together practicing methodologists and methodologically inclined academics to address common problems and common solutions to real world marketing issues.
2. Act as a conduit for knowledge transfer from theory to application, and in the process provide feedback on what worked and what didn't work in the real world of marketing.

The original ART Forum was based on a concept extension of Rich Johnson's Sawtooth Software Conference. And, I need to make sure the record is straight - Rich Johnson is also the "father" of the original ART Forum. It was his concept and his execution that we were attempting to duplicate to extend the coverage of subject matter beyond that which was traditionally being covered at the Sawtooth Conference at that time. It worked, for a while. All of us who developed the initial design of the ART Forum were dedicated attendees and participants in the Sawtooth Software Conference, and we were deeply appreciative of all the work and care that went into its planning and organization. Our motive was to supplement Sawtooth, not replace it.

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Those original ART Forums were characterized by impassioned debates on methodological issues, irreverent intolerance for any “black box” presentations, and a demand for methodological transparency. You needed a tough skin and a quick mind to be a presenter, lest you be eaten alive by the audience.

By design, there were long breaks between sessions that allowed for continuing open-ended discussions after each presentation and informal discussions outside the presentation hall. And we all had a great time and learned immensely in the process. We also had the opportunity to get to better know our fellow methodologists – both practitioners and academics.

The academics that attended were almost exclusively well-published, tenured, dedicated teachers who kept their feet firmly planted in both the academic and the practitioner worlds – folks like Paul Green, Bill Dillon, Jordon Louviere, Joel Huber, Vijay Mahajan, Greg Allenby, and many others too numerous to mention. Their questions and observations were invaluable to the learning experience.

So what did go wrong? More importantly, why?

Has it gotten too academic as Dick suggested? Yes, I believe so. Having five presenters listed for one 30 minute presentation and a 10 minute Q&A is a sure sign that a bunch of people are “resume building.” But being “too academic” is an insufficient descriptor. I’ve been to a lot of academic conferences where I’ve learned a lot. I think the problem is more one of relevance. The conference has lost its focus on practical issues and applications – those that have relevance to the real world of marketing. The models and modeling techniques have become more important than the outcomes and their applicability to practical issues. (Again, the 2012 conference appeared to be an exception, based on the presentation titles and presenters.)

As Dick also implied, there is the generalizability issue – can the methods and procedures presented be generalized to a class of problems that we know already exist or are likely to exist in the environment? It seems to me that the generalizability issue has taken a back seat to the perceived elegance of the model or technique. Seldom do you see the presenter who has walked their pet technique through multiple scenarios and multiple samples.

In the early ART Forums we put a premium on finding presentations where a generally accepted model or technique didn’t work. We assumed that failures were of high educational value and provided an opportunity to reinforce the skepticism that is a necessary trait for our field. I fondly recall Steve Cohen standing in front of the audience stating that he “tortured the data until it confessed.”

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But all this has to do with the presentations themselves, which is a relatively easy fix.

In my opinion, the real underlying problem is the management of the conference. This is where ART Forum has diverged significantly from the Sawtooth Conference. The Sawtooth conference was conceived and actively managed by Rich Johnson for many years. Subsequently, the Sawtooth staff remained true to Rich's vision and management style.

In contrast, the ART Forum is managed by an ever-changing committee selected by an ever-changing Marketing Research Division Council and the AMA staff. The original vision has vanished and the continuity of focus seems to have vanished with it. Maybe David Bakken and David Lyon will respond to this observation since they have been on recent ART Forum committees and are long time attendees.

There seems to also be a scarcity of interaction time. There is no cocktail reception, the breaks between sessions have vanished, and there seems to be little time available for the often workplace-isolated methodologists to renew friendships and make new ones. I believe this was one of the most important features of the ART Forum and contributed immensely to the learning experience. But it seems to have disappeared. Even the unsanctioned floating poker game of those early years contributed greatly to building friendships and lasting experiences.

ART Forum seems to have lost its groove. Or maybe it's just that Dick and I are getting older and more curmudgeon-like. Dick?



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