

Forging new relationships

I hope you are all well and business is going well.

It has been a strange year which started promisingly and then wobbled a little half way through with clients holding back commissioning projects and thankfully things are **now back on track**. Traditionally the last quarter of the year is the busiest and this year will be no exception.

ESOMAR Congress this year was held at its home city of Amsterdam in the former gasworks Westerngasfabriek where we were invited to

celebrate market research rather than complain about the problems, the glass being half full and not half empty.

I was pleased to be your representative at the second Associations meeting where we were treated to hearing the results of their global industry survey (2010 figures) revealing that as an industry we are **back in growth** by some 5.2% (2.8% after inflation is taken into account).

Most of the growth was in Latin America, particularly Brazil (well done Alan!). Europe achieved growth of 3.3% (1% after inflation) mostly in Central and Eastern Europe while UK, Germany and France were all in decline.

As expected the on-line world accounts for much of the growth at the expense of F2F and telephone, and emerging markets are forging ahead with advances in technology

and infrastructure making data collection possible in regions that were previously difficult to survey.

The good news is that all the large major companies are in good shape following the recession and showing profitability.

There were cautionary noises from **EFAMRO** about privacy laws within a national and international context warning us to be on our guard against data breaches and notification of these breaches when they occur.

ESOMAR invited us to join in a global initiative to campaign internationally to protect our interests and to assist international associations talking to governments – **together we are stronger**.

AIMRI is something very special and provides an opportunity to access international markets in a friendly setting. Market Research is a 'people' business and we prefer to deal with people that we know and **AIMRI** provides an excellent platform to forge new relationships and maintain existing relationships in a relaxed atmosphere.

We have been pleased to welcome new members from the USA, Cyprus, Germany and Italy so far this year and I would like to take the opportunity to thank the council for their efforts in helping to recruit them, keep up the good work.

We are looking forward to our next meeting in Munich where we will be

discussing **"the future of market research in the internet age"**. We have some interesting papers to look forward to presented by members from a variety of countries and it promises to be a lively discussion and I look forward to seeing as many of you as can make it joining us in **Munich**.



John Mackay
Chairman

Growth in Latin America

Inside this issue:

Cyprus conference	
Effect of digital revolution	2
Munich conference	
Adapting to latest trends	2
Revolution of enthusiasm	
Preview of Munich conference	3
New York conference	
Redefining market research	3
Finding and using resources	
Review of London conference	4 & 5
Social media guidelines	
Problems of regulation	6 & 7
Avoiding the rear view mirror	
Another preview of Munich	8



Cyprus see page 2



The digital revolution and market research

The early spring 2012 **AIMRI** conference will be near Limassol in Cyprus on Friday 24 February 2012. The subject will be:

How is the digital revolution shaping our industry: challenges and opportunities

Among the topics to be explored will be the following:

- How can we address the digital/social challenges and capitalise on the opportunities ahead and stay relevant?
- What are examples of new and innovative research approaches that address the digital forces: connectivity, convergence, social media?
- How do these forces affect the way agencies are structured and operate as well as the skill sets they should seek in new applicants?
- How can we maintain relevance in light of the increasing adoption of data crunching and DIY research?



Kolossi Castle near Limassol

decade ago. **Facebook, twitter, the mobile app revolution** are all phenomena which are very recent.

Indeed, forces such as connectivity, the convergence of technologies and industries as well as social networks are changing the way consumers receive and provide information, make product choices and interact with brands.

This engenders both challenges and opportunities for our profession and is spawning new and innovative research approaches.

Cyprus is a delightful island with a fascinating history. It has a very mild and mostly sunny winter. Our hotel will be the comfortable five star Amathus Beach, recently refurbished, near the Amathus ruins, close to **Limassol** and accessible to both international airports.

This will be another stimulating event in an historic environment. For more information please contact

Richard Chilton (tel +44 20 8780 3343 e-mail rtchilton@aol.com).

The digital revolution is profoundly affecting our industry in ways that had not been imagined even as recently as a

Adapting to the latest trends

The autumn 2011 **AIMRI** conference will be in Munich on Friday, 28 October 2011 following the Research & Results Show. The subject will be:

The future of market research in the internet age

Among the topics to be explored will be the following:

- **Prediction.** Can research be used to predict the future?
- **CATI research** – How should suppliers respond to the growth of online research?
- **Social networks** – Making use of an ever increasing activity.

The conference will be at the Platzl Hotel (where **AIMRI** met in 2009) and will follow the Research & Results Show. This will take place on 26 – 27 October 2011 at the

M.O.C. Convention Centre in Munich and **AIMRI** will again host an international village. Visitors to Munich from other countries can combine both events.

This will be another stimulating event in an historic environment. For more information **please contact Richard Chilton (tel +44 20 8780 3343 - e-mail rtchilton@aol.com)**



A Rolling Annual Meetings Plan

Dates and venues:

Fri, 28 October 2011	Platzl	Munich	Munich
Fri, 24 February 2012	Amathus Beach	Limassol	Larnaca
Fri, 27 April 2012	tbc	New York	New York

Subjects:

For October 2011 the subject is:

“The future of market research in the internet age”

For February 2012 the subject is:

“How is the digital revolution shaping our industry: challenges and opportunities”

For April 2012 the subject is:

“Research and insight redefined”

Anyone wishing to speak in Cyprus or New York should contact Richard Chilton.

The Superpromoter The Revolution of Enthusiasm

Superpromoters personify the power of enthusiasm. They spontaneously share their enthusiasm about products, brands and companies and influence other people by doing so. Their **infectious enthusiasm** is vital to the success of any business. It's the battle between them and their alter ego, the antipromoter, which decides if the reputation of brands is built or broken. They not only affect sales growth, but also innovation and employee motivation.

Driving force

Superpromoters are the driving force behind the success of every company, so one would assume that employees and management are very familiar with them. The reality is that most organisations suffer from a severe case of Superpromoter blindness.

The focus is on why products fail and the negative consumer feedback rather than optimising the potential of **enthusiastic loyal customers**. In a world where social media is becoming more and more dominant it is all the more important to understand how the **Superpromoter** can benefit your organisation.

In his speech Bastian will explain how organisations can become more successful by identifying and marshalling their Superpromoters. **Bastian Verdel** is MD of Blauw Research in Germany. Together with his team he introduced the Superpromoter principles, developed by **Rijn Vogelaar** to the German market.

Bastian Verdel will be giving a speech on the same subject at the **AIMRI** Conference in Munich on 28 October 2011.

Bastian Verdel
Blauw Research
Nürnberg



First AIMRI conference in the United States

On Friday, 27 April 2012 **AIMRI** will again cross the Atlantic – this time to New York where **SIS International Research** (led by Ruth Stanat) are organising our first conference in the USA.

The venue will be announced soon and will be in Central Manhattan. The title will be:

Research and insight redefined

What will the conference be about?

- Are we making maximum use of disparate information?
- How does Social Media fit within the market research toolkit?
- Are there any limits to the growth of online research?
- Do we need different techniques for research in developing countries?

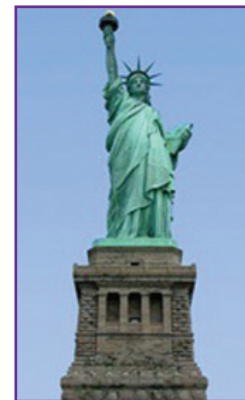
- Cloud computing – are we exploiting the opportunities?
- Can full service agencies continue to provide a complete service?

SIS International Research have exciting plans to develop and promote the conference and there will be sponsorship opportunities.

New York is a key centre for market research (**both theory and practice**). This conference will be well attended and there will be ample opportunities to meet with American researchers.

Members who would like to make a contribution should contact **Richard Chilton on +44 20 8780 3343 or rtchilton@aol.com** who will pass all ideas on to the SIS team.

Meanwhile, save the date!



Statue of Liberty



Finding and combining resources

With London in full swing, and as jam packed as we have ever seen it, the July 1 2011 **AIMRI** conference followed what appears to have been a very successful Insight Show. Attendance was very high at Insight, and reports indicate that the **AIMRI** Village was well received by attendees.

The **AIMRI** meeting itself, held at the Hilton Olympia, featured five speakers throughout the day's session. Our papers began with **David Bacon** from **2Europe** (Hemel Hempstead, UK) discussing the results of a research project he conducted amongst agency executives and client-side professional research executives. The purpose of the survey was to understand more clearly who is responsible for identifying the questions asked in a research project and what is the process used to make those decisions?



Tower of London

The theory, of course, is that there is (in most cases, at least) a clear, definitive process which leverages survey objectives. Well, after sifting through data David learned that there is limited use of a specific development process. "Agencies mainly consider they provide the questions (45%) and clients also consider they mainly provide the questions (50%)."

No clear cut process

It's evident from this research that there is no clear cut process for setting questions which may be a considered somewhat a detriment to the MR business. We need to take the lead: demonstrate knowledge, create value and build the relationship. But what is true, according to David, is that having clear objectives make this process more precise, in the long run easier as well as more productive. So, before you begin developing a questionnaire, make certain there is clear agreement on objectives.

Thereafter, **Nik Harta** with **Opinion Matters**, (London) covered the topic, "**How clients should use research.**" Nik noted that all clients want a job well done, at a fair price, completed on time and according to spec. They also should use research, although it is not always stated, to "**...gain insight or support decision making.**" To this end, Nik noted that not just anyone can be a research professional.

Therefore, as part of helping clients gain insight or make decisions, he suggested MR professionals work diligently to leverage our experience and deliver thoughtful interpretation of study results that will create value when decisions are made. He presented several case histories that illustrated these points and concluded with the notion that we have two ears and one mouth...listen carefully, deliver what the client needs and wants.

John Attfield from **Attfield, Dykstra Partners**, (Buchholz, Germany) addressed what must be considered to conduct successful international research. The main message was to be sure to understand fully the differences you are likely to encounter when conducting the same survey in different countries.

It was very interesting to see several photos that John used illustrating different focus group facilities. In Germany the room for participants was small and a tight fit; the British room very pleasant and comfortable; the U.S. room small, compact, spartan. The intricacies of international research are very tricky, indeed. Small differences in language use, scale interpretation, as examples, can have big impacts on how things are done and what data are generated. His suggestions were to pay careful attention to local conditions, respect local differences, and when possible, use local partners who are **very familiar with circumstances** and will help you avoid mistakes.

Jack Semler (the author) with **Readex Research** (Stillwater, MN, US) spoke about mixed mode surveys, in particular postal combined with online, and how changing the mix of components can impact response. In one example cited, a client tested the addition of a mailed notification letter to an online survey, in which the standard procedure was to send three email invitations to participate. **Response rate jumped** from 27% to 42% when the client sent an advance letter with a dollar incentive and followed on with three emails.

In another situation, a client moved from a total mail survey to mail invite-to-web. While overall response rates fell, the mail-to-web approach yielded sufficient online response for the client to **lower the cost of fieldwork significantly** yet yield adequate completes to conduct the project.

Sundara Rajan with **Market Search**, (Mumbai) brought the day's presentations to a conclusion by discussing how to leverage resources in Asia. He noted that with the consolidation of research agencies, there is a small selection of very big agencies working in the region, as they buy out mid-size firms.

There will also be the small organisations, all of which leads to this point: a key differentiator between agencies, large and small, will be their ability to **deliver local knowledge and local insight.**

AIMRI meets in London

Sundara made four recommendations:

- cooperate with local partners and leverage their local knowledge from design through completion;
- move from "labor arbitrage" to knowledge partnering;
- use educated Asian youth to boost your image; and
- use this same youthful talent to decode and understand more fully the plethora of communications and chatter pouring into the web and social media.

Following the break, our attendees participated in the Annual General Meeting and open council. As usual, many different topics were addressed, with decisions coming forth on several issues.

And, then with maps in hand, we proceeded to dinner at a very fine **restaurant in Chelsea, Le Colombier**. With our kirs and red or white wine, we were treated to a very tasty dinner with a delightful main course of

St Jacques. I think it's safe to say all attendees very much enjoyed the **atmosphere and cuisine**.

Of course, with such great weather in London for many days, a nice walk thereafter was the perfect ending. **See you in Munich.**

Jack Semler
Readex Research
Stillwater, USA



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New members

Eccom Progetti

ECCOM has been working in the last 12 years in the field of cultural management with the aim of promoting an interdisciplinary approach to cultural organisations. In order to better achieve its objectives, **Eccom** has implemented two complementary tools: a non for profit association, which represents the continuity with the original organisation founded in 1995, and a limited company with an entrepreneurial approach to cultural management.

Founded in December 2007, **Eccom Progetti** represents a strategic evolution of **Eccom's** vision and action.

The company, which operates in the field of cultural planning and management, provides consultancies, technical assistance, training activities addressed to public and private organisations and it elaborates feasibility studies concerning cultural sites, projects and investments.

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MASMI Cyprus

MASMI Cyprus is part of the **MASMI Research Group**, established in 1994. We specialise in ad hoc consumer and B2B research across the whole of Europe, Central Asia, the Caucasus and the Middle East, where we have a network of offices in 10 countries.

We have particular expertise in the areas of FMCG, financial and telecommunications research. Our capabilities span a suite of advanced quantitative research solutions and analytical tools, and the latest thinking in delivering insightful qualitative research. We are particularly strong in online research and offer the latest technology platforms for community panels and web-listening through our affiliation with DigitalMR, a digital market research and web listening specialist agency.

We are staffed by a youthful, client-centric and highly talented team of researchers, led by seasoned consultants with extensive industry and category experience, coupled with an in-depth knowledge and appreciation of the local markets and surrounding regions.

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Social media research guidelines Regulatory preempt or potential handicap?

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In case you haven't heard, market research has officially entered the age of 'Big Data'.

This revelation came not by way of proclamation or edict, per se, but manifested itself in the earnest efforts of several key market research industry trade organisations this summer to wrap standards around the collection, analysis and use of data sourced from social media—primarily from an ethics/privacy standpoint.

ESOMAR in cooperation with CASRO respectively released **guidelines** (see ref 1) for social media research (the latter's are still in **draft** (see ref 2) stage) and the UK's MRS issued a **discussion paper** (see ref 3) on the subject that will presumably lead to creation/adoption of standards along similar lines. I expect our other trade organisations will in short order follow suit with their own rules and/or officially defer to their sister orgs' lead.

The primary concern and ostensible reason for these guidelines — aside from obviously trying to preempt regulation that could potentially harm the industry — centers on anonymity and informed consent with regard to data harvested in the online public domain (as opposed to conventional opt-in MROCs and comparable private gardens).

The problem is that these social media research subjects are not respondents, and securing informed consent is, under the circumstances, an unreasonable and unrealistic expectation. Protecting people's identity is also more complicated than it seems, and proposals to 'mask' individuals' remarks, while promising, probably need a little more thought.

The only solution appears to be to apply principles akin to those governing passive observation practices in public spaces in the analogue world to the digital space, with a particular emphasis on two rules of thumb: **1. Do no harm, and 2. Don't sell.**

Sounds perfectly reasonable. But as you probably already know or suspect, the matter isn't quite cut-and-dried.

For those not up to speed, I strongly recommend as a primer listening to the recent "**Great Market Research Privacy Debate**" (see ref 4) webcast organised by NewMR, MRGA, GreenBook and Next Gen Market Research.

A fool's errand?

Fascinating conversation on several fronts, not the least of which being that the panelists — including representatives from the trade organisations mentioned above — to varying degrees addressed the question of whether or not the imposition of any guidelines governing social media research is a fool's errand.

Compelling arguments were made on both sides, but the jury is still out.

Personally, I'm inclined to agree with GreenBook's Editor-in-Chief, **Leonard Murphy**, who hosted the debate and blogged afterward that such guidelines, while well-intentioned, are unenforceable. (Check his full commentary here (see ref 5)—an exceptionally insightful and provocative read!)

I would also stress that they may potentially put law-abiding research citizens at a competitive disadvantage.

Facebook, for example, has been dogged by privacy complaints for years, but I could see why a research provider would rather put the onus on Facebook's ToS than defer to a trade association's guidelines in a world where companies that don't fit the conventional research mould and don't have any interest in doing so are unencumbered by the additional layer of rules I'm following.

I'm not suggesting that the ability to compete effectively and adherence to research guidelines are mutually exclusive, nor that researchers should abandon core principles, but I wonder whether the industry's efforts to self-regulate in order to avoid being regulated in this case may handicap it.

So as the industry draws its line in the sand in a world of rapid, continuous change, are we at risk of regulating ourselves into irrelevance?

The article continues opposite with comments on the subject from various sources.



New York

Research guidelines - relevant comments

Here I'll circle back to the "**Great Market Research Privacy Debate**," whose purpose was, in part, to explore how to reconcile research orthodoxy with today's reality.

Panelist **Ray Poynter**, EVP at Vision Critical and author of "**The Handbook of Online and Social Media Research**," suggested that in an 'attempt to stay ever purer' the industry's professional organisations are effectively narrowing the definition of market research to methodologies and practices that constitute a shrinking portion of the overall sphere of commercial insight/information services.

Panelist **Tom Anderson**, CEO of Anderson Analytics and Founder/Chairman of Next Gen Market Research — an outspoken critic of research association policies in the past — argued that non-traditional techniques like social listening and text analytics are an entirely different animal from traditional response-based research and shouldn't even fall under the jurisdiction of establishment research organisations whose primary constituents, Anderson suggested, lack the expertise and incentive to craft suitable guidelines. (Tom elaborated on the topic (**see ref 6**)).

I inferred from this that Tom considers social media analytics to belong to a new incarnation of the research industry, one that includes players that don't necessarily identify as market research companies.

If that's the case, is market research suffering from an identity crisis? What distinguishes 'legit' market research from, say, information services provided by Facebook?

At the end of day, I believe it's really the client's call.

Coca-Cola's current global research head, **Stan Sthanunathan**, predicted a few years ago that Facebook, Google and the like will eventually become major

competitors with top Honomichi firms. And he stands by this claim today. (I know because I just interviewed him for our podcast series, The Research Insider — shameless plug, I know.)

And **Michelle Adams**, PepsiCo's head of shopper insights, recently remarked that research "has become a game of connecting the dots, thinking like a consultant and being able to pull all kinds of disparate information together to tell a story that will grow the business. The skills and expertise required for the role today make staffing for success difficult. There's enormous pressure to evolve the function into something much more than it was historically."

Adams also said that "social analytics is where we're moving, and data analytics will be the research currency of tomorrow."



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Beyond the rear view mirror

Using research for innovation and forecasting

Henry Ford once said ***"If I'd asked my customers what they wanted they'd have said a faster horse"***.

Other cynical voices have been raised about research over the years. We've all heard them, I'm sure. These siren voices say that:

- ordinary customers aren't much help when it comes to creating breakthrough innovations; and
- research is at best a 'rear view mirror' which tells you about the past but doesn't help you manage the future.

Ordinary customers stand accused of a lack of imagination when it comes to envisaging the future.

We must begin by accepting that these criticisms have some degree of truth in them. Anyone who has conducted interviews with successful entrepreneurs will know they can be somewhat ambivalent about market research. A recent research study of the entrepreneurial mindset in the USA carried out by the University of Virginia revealed widespread cynicism with regard to formal market research.

Many entrepreneurs adopt the Nike ***'Just Do It'*** philosophy. If it feels right, try it. Should we be concerned when some of the most admired companies of our time admit to doing little or no market research? For example, Steve Jobs launched the Apple iPad to critical global acclaim but has been quoted in media interviews as saying, ***'We do no market research'***.

I would argue that this represents a big challenge for our industry, but not one we should take on alone. The tasks of creating breakthrough innovation and forecasting the future (or envisaging future scenarios) in ways which are helpful for business are simply unreasonable for market research to address on its own.

Creative combinations

This is where the lateral thinking technique of 'creative combinations' is helpful. It is my contention that market

research is more powerful when combined with other things. My company has found, for instance, that the combination of market research with creative thinking techniques can help companies generate and develop new ideas.

Co-creation techniques are helpful, like our Fusion Workshops which combine company managers and groups of their customers in one place and employ creative thinking techniques. Customers become more creative and managers more realistic in their ideas. The same can be said of the creative dialogue which emerges when companies operate online communities. The combination of research with different forms of forecasting and expert opinion, can lead to better models of the future.



Munich

Creative combinations also lead to different research outputs - ***is the end point of our research process some data tables and a Powerpoint presentation or is it a book, a video or a computer program?***

Ingenuity needed

I believe what we need is the ingenuity to create new processes, combining new elements with research in creative ways. The combination of market research with other ingredients may help produce a mouth-watering array of research-based offerings in future.

Gordon Adams will be giving the keynote address on the same subject at the **AIMRI** Conference in Munich on 28 October 2011.



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