

Making sense of it all

Greetings, we are half way through another year and looking forward to the summer here in London and the forthcoming Insight Show where we have our **AIMRI Village** which always provides a focus for members to meet and recruit new members.

Our next meeting, in July, we will be addressing the issue of **'Finding and combining resources'**. This is very appropriate at this time when there is so much data available from so many different sources that we are overwhelmed, so it is the job of researchers to make sense of it all and interpret it for clients. Social networks are proving to be increasingly popular and people are happy to share their experiences and personal information with the rest of the planet while at the same time governments are tightening up privacy laws.

We have a contradiction here which was highlighted in a recent case where the 'legitimate' press was not allowed to disclose information that was already 'published' on 'Twitter' and everybody was aware of. These networks have an identity problem, are they publishers or something else? They cross borders and are unaccountable.

DIY research enables clients to conduct their own research leaving us out in the cold and there is evidence that clients are using these tools more and more. They may be crude and low cost measurements but they are telling clients something or they would not be using them, so we must acknowledge their place and **help clients understand the story**.

Somebody sent me a clip from uTube showing a couple in a restaurant debating the bill after having eaten a meal and arguing the bill was over budget! When the waiter pointed out they had actually ordered all the items they had chosen from the menu and should pay for them the couple still maintained it was still over budget and did not want to pay for what they had eaten.

This struck a chord with me as a reflection of what happens in our industry on a daily basis, job creep.

Interpret the data for clients

Often suppliers will absorb these extras which are frequently not allowed for in the original quotation. Strangely, it is usually the same clients who use these tactics and are often slow payers at the same time, is there some 'insight' here?

We were privileged to listen to a keynote paper from David Smith at our last meeting in Malaga at the start of this year talking about **"delivering 'Insight' in a cost conscious age."**

Innovation is everywhere apparently and with emerging markets making up the majority of economic growth **AIMRI** is well placed to **show the way by providing a forum**. I would like to reach out to these markets and offer the experience we have gained over the past years.

John Mackay
Chairman



How clients should use research

by Nik Harta

When employing a tradesman, such as a plumber or electrician, you would expect to get references and check they are qualified to do the work. As a customer you would leave the expert **to give you constructive and honest advice**, provide you with the best finished product, delivered to the highest standards.

Those working in the market research industry should surely not treat their customers any differently - do unto others as you would have them do unto you.

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Nik Harta will be speaking on this subject at the AIMRI meeting in London on 1 July 2011.

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Munich see page 2.

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?
- **Online panels** – are they destined to become even more important?
- **CATI research** – how should suppliers respond to the growth of online research?
- **Social networks** – making use of an ever increasing phenomenon.



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.

Munich

The comfortable four star Platzl Hotel is located next to the famous Hofbrauhaus and within immediate proximity to the Marienplatz, the Bavarian State Opera, Maximilianstrasse and the Viktualienmarkt. Facilities are excellent and include a sauna, solarium, gym etc.

Munich is the Capital of the state of Bavaria and lies near the foot of the German Alps. It is Germany's second most popular destination after Berlin, and has something to offer to everyone, be it culture, hi-tech, parks and greenery, night-life, architecture, beer gardens, shopping or the skiing and

sailing close by.

This will be another stimulating event in an historic environment. **For more information please contact Richard Chilton (tel +44 20 8780 3343).**

Client use of research

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The world of market research has quite rightly devised a **Code of Conduct** which has evolved over time to protect both the public and support all those engaging in this area. The benefit and interest of the respondent and recipient of the research findings are paramount, ensuring all research is carried out in a **professional and ethical manner**.

The responsibility of the research agency should go further. The client will expect you as the expert to deliver your work using the correct procedures. However, they should also expect you to provide **advice and guidance** to help them achieve their aims and objectives.

When planning how to change the lighting in a room you don't want the electrician to explain how the electricity travels from the on / off

switch to the bulb but you do want suggestions as to what would be the right lights for the job at hand, placed in the best locations to achieve your objective. A research agency should also understand their client's project aims, objectives and key messages and provide the best advice to deliver against them.

The client will seek out an agency from recommendation, word of mouth or maybe through being **registered with a recognised industry association**.

It should be a given that the research agency will provide best practice while all their work is produced within compliant standards and with statistical robustness. A researcher's expertise and experience should allow them to recommend the best route to return the **insight for which the client is searching**.

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A Rolling Annual Meetings Plan

Dates and venues

Date	Hotel	Venue	Airport
Fri, 1 July 2011	Hilton Olympia	London	Heathrow
Fri, 28 October 2011	Platzl	Munich	Munich

Subjects:

For July 2011 the subject is:

"Finding and combining resources"

For October 2011 the subject is:

"The future of market research in the internet age"

Anyone wishing to speak in Munich should contact Richard Chilton.

2011 Research & Results

The 2011 Research & Results exhibition will be on 26 - 27 October 2011 at the M.O.C. Convention Centre Munich and will again include the **AIMRI** International Village

Those wishing to take part should contact Simone Waller-Klink on Tel +49 71 51 27 08 91 or e-mail waller-klink@research-results.de

Review of the GRIT report

GreenBook have announced the release of the Spring 2011 edition of the **GreenBook Research Industry Trends Report (GRIT)**! After eight years, **GRIT** is the leading and most comprehensive survey of our industry, and we believe that taking our own pulse has never been more important.

We promised the industry **colorful and comprehensive insights** into how research buyers and providers are adapting to the current economy, to emerging technologies, and to the winds of change many feel are buffeting our profession and industry.

The report shows a market research industry undergoing **systemic and tactical change** at a pace expected to accelerate. Whether that change is welcomed as opportunity or resisted as a threat depends to a large extent on age.

Younger researchers with less experience in 'the old ways' are confident they can adapt, while older researchers (with some highly notable exceptions) see their professional world and some of their professional standards cast aside as irrelevant or even damaging.

For this iteration we continue to track all the trends in the industry that we have traditionally focused on, but we have made a strategic **decision to turn our sights to the future.**

Our goal with this edition is to offer insights into innovation in the market research industry, into the pace of new technology adoption, into what companies are leading the industry forward, and into what the industry may be like in the future. We think we met and exceed these goals with the help of our **sponsoring partners** and most importantly, **participants in the study.**

The report can be accessed at <http://www.greenbookblog.org/GRIT/>

You can view a digital magazine version or download a PDF of either the Executive Summary or the Full Report via that link. You can also register to be a respondent in the next wave of the study and to receive updates as they become available.

A report on industry trends together with the main findings are given below.

Industry trends

Despite a backdrop of professional pessimism, anticipated levels of future research spending are actually favorable. Nearly 60% (in the overall sample) indicate that they are either now seeing stronger growth, or expect stronger growth to occur – especially for suppliers, **where 65% are either experiencing or expecting increases.**

In terms of research mix, regardless of client or supplier side, over 1/4 claim that spending will increase more for qualitative than quantitative in 2011. About 1/2 believe that the spending relationship between them will remain unchanged i.e. flat. The positive news is that any change being reported is being fuelled by greater volume, not higher prices per se, and a shift in the mix towards qualitative is not especially uncommon, as the US economy slowly emerges from its recessionary mindset, and focuses on **new business development and topline growth.**

On the qualitative side, bulletin board (28%) or chat-based focus groups (25%), online communities (22%), and blogs (19%) are data collection methods mentioned most. Based on a pre-list of these newer technologies, **online communities and social media analytics** are becoming the two most widely adopted research approaches used thus far, with buyers more likely than suppliers to have embraced them.

Despite the more aggressive adoption of social media, mobile apps, and online communities, **less than 10% of buyers or suppliers predict they will use these methods in the near future.**

Our respondents are realists. When making decisions about data collection methods, respondents **stress four key factors: effectiveness, timeliness, quality, and cost.**

Main findings

The major structural and systemic changes being faced by those in the marketing research industry are:

- Despite a backdrop of professional pessimism, anticipated levels of future research spending are actually favorable.
- The Top 50 Market Research Firms perceived to be innovative.
- Gaps between Suppliers and Buyers, tenure in the industry, age of respondents and geographic location exist when it comes to emerging technology adoption.
- Social media, mobile, MROCs and text analytics are the newer techniques most likely to be used in the foreseeable future.
- Utilising the latest and most advanced technology is certainly important to both clients and suppliers, but the business relationship itself – personal service, responsiveness, and attentiveness – rises to the very top of the list of decision-making criteria.

International research in a cost conscious age

This year's spring conference brought us to Malaga, Spain on 4 March 2011. The old city of Malaga with its 2,800 years of history and the inviting AC Palacio hotel of Malaga created a perfect surrounding for this event. A rainy and rather cold Friday morning welcomed us at the beginning of the conference, so we could fully concentrate on six inspiring presentations on a **'Future of international research in a cost conscious age'**.

David Smith from **DVL Smith** in London started this event by asking **'Do they deliver value & drive growth in this cost conscious age?'** He inspired market researchers to go beyond the delivery of data slide after data slide. Instead he lined out seven actions to guarantee the delivery of meaningful insights to our customers. Among them is a recommended shift from conclusions only driven from statistically representative results – 'the gold standard' – towards a broader view of our customers in combining **various sources of information**, which do not always comply with the **'gold standard'**.

Wide angle lens

The researcher is therefore, urged to become the 'wide angle lens' of our customers. Only focussing on statistically representative results narrows our possibilities in such a way that only few findings are possible which also may need a longer time to develop until results can be presented. Insights will only be meaningful to our customer if they **can inspire action**.

Telling the insight story

Therefore, the insight story has to be told in a fashion that inspires actions and creates value for our customer. In order to do this we also need to recruit researchers with an entrepreneurial gene who can embrace causal and effectual reasoning. This presentation, like all others, can be downloaded from the **AIMRI** website which is highly recommended to get a full list of his **seven actions** and what they mean for our research community.

How can we adapt to cost pressures? **Ruth Stanat** from **SIS International Research**, New York, shared her thoughts with us in presenting her view of **'The era of the agile research agency'**. Dangers and also chances can come from various directions which influence today's international market research agencies. Often we are facing falling budgets as our buyers cut costs. Easy implementation of online questionnaires and trends like co-creating lead to **do-it-yourself studies** by our customers.



Malaga

Furthermore, new entrants in the research community and competing companies who differentiate their offers can be observed. Research companies can react in different ways, as they can keep their prices or lower their prices, and also keep their costs or lower their costs. All combinations have their pros and cons but being more effective e.g. operationally or technically can **lead a way out of the current deadlock**. After the crisis **innovation and leadership** are needed as well as talented and more productive staff. All initiatives have to be sustainable to lead the research agency in the new era.

Calling Nordic countries from Spain

High salaries and high taxes make fieldwork in the Scandinavian countries relatively expensive. **Johnny Heinmann** from **Analysegruppen** in Silkeborg, Denmark, showed one possible way to cut cost in 'Calling Nordic countries from Spain'. A group of roughly 30,000 Scandinavians are constantly living in the vicinity of Malaga

which made it feasible for Martin Wenzell to establish the fieldwork agency **Infonordic** near Malaga. Often young people from Scandinavia take a time out to go to Spain for about a year to enjoy the warm climate. Due to the low costs of living they can work for reasonable wages in the **CATI studio of Infonordic** which on the other hand can cover all Scandinavian languages **with native speakers**. No other region in the world outside Scandinavia can offer these services.

Paolo Rossi from **Lorien Consulting**, Milan, followed in presenting **'Alternative sources for recruitment and research'**. His company developed strategies to recruit respondents efficiently for online access panels tailored to the needs of specific customers. Their innovative, customised and convenient approach makes it possible to install feedback systems which are also affordable for the often smaller and medium sized companies in Italy. Examples were reported where the new approach created not only more cost efficient results but outperformed also former CATI studies in **delivering more meaningful insights**.

Comments of traveller on the web

An example of Web 2.0 as a source for market research in the travel industry was outlined by **Nicos Rossides** from the **MASMI Research Group** in Cyprus and London. Often, marketing managers solely rely on traditional sources like mass media for their marketing decisions. The various comments of travellers which can be found on the web are widely ignored.

AIMRI meets in Malaga

Feedback of customers

On the other hand, the feedback of customers is a source which is used by a lot of travellers to plan their next holiday and which, therefore, has a significant impact on their decision making. Especially comments about the price-performance ratio of an area or a hotel can be found in the statements. In order to learn from this the **MASMI Group** has established a system to use these feedbacks for brand building in the travel industry. In his lively presentation, an example from the travel industry in Cyprus was given to illustrate the benefits which can be gained from this approach.

Fieldwork in Portugal

Contrary to the prior announcement the last paper was not presented by Antonio Salvador from **Intercampus**, Lisbon. Because of illness he was replaced by his colleague **Maria Retorta** who presented insights in **“Responding to challenges”** in the fieldwork in Portugal. As in other parts of Europe, Portuguese fieldwork agencies face a decreasing market for field work. New data privacy guidelines, a small coverage of landline telephone lines across the country, reluctance to take part in surveys and an ageing society create an environment where interviews are more and more shifted from CATI to online. Some special interest samples

are built to even cover hard to reach target groups like doctors.

The conference closing dinner was held in the Parador restaurant uphill in the vicinity of the historical site of the **Castello de Gibralfaro** which was once a Moorish castle. From there one has a fantastic panoramic view over the city and the harbour. An excellent dinner with stimulating discussions convinced again that as in 2008 it was worth while coming to Malaga.



Ralf Zacharias
MAIX Market Research
Aachen

New members

Opinions Ltd

Opinions Ltd was founded in 1998 with one basic principle: to provide quality data collection services with personal attention to every aspect of the research process. Our staff are well versed in every facet of data collection, whether it's face-to-face, telephone or our online panel. Our main objective is to be your strategic partner whenever, and wherever, you may need us - providing consistent, accurate, timely and cost effective data collection.

Our facilities are strategically located to provide the very best demographic makeup that represents the United States. Data collection is comprised of mall intercepts, focus groups, in-store intercepts, ethnographies, large CLT, pre-recruits, sensory research, national recruiting, and online surveys. Our corporate hub coordinates all of our locations and national staff as well as providing additional services such as programming, coding, data entry and analysis. With one call we have covered from coast to coast.

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Schmiedl Marktforschung GmbH is a prestigious, independent German fieldwork company. We are a one-stop provider for all our clients' needs – nationwide in Germany, as well as pan-European. Our Berlin, Munich and Frankfurt studio facilities offer quantitative and qualitative market research and are also equipped for CATI.

By making the most of our strategically valuable locations, and by co-operating with carefully selected partner companies based all over Germany as well as abroad, we are able to provide comprehensive, tailor-made market research services.

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The Global Talent Crunch

One of the most daunting challenges in today's global economy is the 'Talent crunch' and challenges in scouting, recruiting, and growing talented people in your firm. Ageing societies are struggling to find the 'right' people to run complex and high technology processes.

According to Softscape's **"State of Global Talent Management"** market research report in February 2009 survey of 200 HR professionals:

- The HR organisation is considered strategic by a majority of companies - 78% of companies.
- HR professionals (59 %) still believe their workforces are not adequately prepared to meet their companies' future plans.
- More than 70 % of companies are still primarily paper-based in two or more of their key talent management processes, with smaller companies lagging significantly behind.
- Technology-enabled automation of discrete talent functions is providing significant opportunities for cost containment. Explosive growth in the use of more 'strategic' cross-functional HR metrics leveraging workforce analytics was expected.
- Two-thirds of the companies surveyed - and 76 % of large enterprises - believe that it is very important to measure and communicate the impact of their HR programs with metrics, key performance indicators, and workforce analysis.

Spotting Talent

A robust Talent Management function, within a company, hires beyond the traditional model of looking only at skills; instead, they hire by 'talent'. Focusing on defining the talent needed to reach organisational goals, and building a plan to make certain you have the talent available is the crucial first step in a robust TM function.

Their approach goes beyond an external approach. Managers need to be able to know their own talents, requiring a great deal of introspection. A secure leader has no problem in hiring people better than themselves.

As part of a company's long-term Talent Management procedures, much of the scouting process involves getting both managers and members of Generation Y on board.

Generation Y has fundamentally different objectives in their behavior, outlook and interaction in the workplace. Generation Y, as a baby boom generation, is widely considered one of the most important generations in advancing a rapidly ageing workforce.

Advantage of Integrating Generation Y into Companies

SIS International has built a model that proactively integrates very talented members Generation Y in creative development, strategic planning and research. Essentially, the goal is to harness both the strengths of older and younger generations, while minimising the intergenerational tensions that often arise in corporate settings.



New York

Embracing Generation Y is one possible method. For example, at SIS managers fully embrace the youth. We provide them with an uncommon opportunity for experience and confidence to allow them the opportunity to thrive, and through their

perspectives, we have considered many new initiatives that have contributed to our success, our commitment to innovation and ability to provide high degrees of client value. But, what works in our company may not work in others. It is a matter of striking the right balance between strategy and culture.

A War for Talent After the Recession

The war for talent is going global, due to cost efficiencies and an understanding of the **dramatic shift of emphasis and economic growth from the West to the East.**

I predict that the global financial crisis and recession is wreaking havoc on global talent management. I have said, **"Tons of articles lecture companies on layoffs, but many managers are concerned with survival and solvency, or put bluntly, their jobs will be in jeopardy. This is a very important consideration for recruiters. But, they need to track the market for signs of recovery. When the economy comes back in the future, I expect a war for talent due to seismic changes to the workforce happening right now."**

Alignment with your Culture

The Talent Management function certainly considers necessary skills and the candidates' ability to grow their skills, applying them to core business processes and leading change. Talent Managers analyse the candidate's ability to fit within the corporate culture - viewing corporate culture as a valuable competitive advantage.

Talent Crunch continued ...

For certain companies, integrity, responsibility and character are important in ensuring that the company's long-term interests will be fulfilled. For example, many financial services firms look to ensure that their new talent are group-oriented to minimise self-serving behavior that could potentially endanger their firms.

Aligning talent with corporate culture is not fluffy marketing jargon. A strong corporate culture with employees on board contributes to strong competitive advantages in companies like Southwest and Apple.

In corporations with rigid organisational structures, there can often be significant numbers of talented people. But, it is often the case that talent do not feel valued, respected or do not feel a sufficient amount of **freedom to conceive and implement creative ideas**.

Maximising Value in Talent Management

Many companies push to build environments that cultivate robust relationships with talent acquisitions. This is because of the sheer value of the talent in the company's operations and the competition that could arise if the talent acquisition is unsatisfied. Also, companies want to ensure that their talent will thrive, even if the corporate culture is rigid. Many companies consider the best way to do so is by creating for their talented staff a network of robust relationships based on truth, reliability and trust.

I wrote in my book *"The Intelligent Corporation"* about the need to share information prior to the Information Revolution and provided a framework for doing so back then. Now, the

need is even more evident. Companies like Accenture and IBM have integrated complex knowledge sharing systems to get their consultants in contact with talented experts throughout the corporation to immediately disseminate high level technical knowledge. The take-away here is in implementing processes allowing the company to harness and make use of their talent immediately.

A long-term perspective

Talent Management is a long-term process, with three potential ways to continually cultivate their talent:

- **Retrain** – have to retrain people and ensure that they have the right resources to execute.
- **Reposition** – do not discard antiquated talent, but help reposition them periodically according to their strengths to the company.
- **Retire** – plan with your staff their retirements and futures to build goodwill and loyalty.



Ruth Stanat
SIS International
Research, New York

Client use of research

... Continued from page 2

Even once that data has been captured the researcher should be presenting the findings in a way that can be clearly understood and best interpreted in a language they can understand.

Now more so than ever, **corporate expenditure needs to be justified** and suppliers will be challenged to demonstrate value. The threat to the market research industry increases as self service research tools become more commonplace, allowing anyone to become a self proclaimed research professional in minutes. Through inexperience a client may design a questionnaire using unintentionally poor wording. Any restricted thinking on what can be gleaned from each question may lead to lost opportunities and wasted money if the subsequent findings are **too limited or cannot be used at all**.

The market research industry now **needs to demonstrate value** in its expertise by not just delivering mere data tables and charts but also taking ownership of translating the data into a format the **client can instantly use**. The benefits of carrying out research ought to span across several elements of a business to provide insight for a **variety of purposes** from business and commercial perspectives through to communications and product or industry development.

We have two ears and one mouth so that we can listen twice as much as we speak. Time is at a premium and we need to recognise when a client has no interest in the finer arts of statistical analysis and research methodologies when they are only looking for what they want, when they want it and **in a way that they can use it**.

Nik Harta
Opinion Matters, London

Too much information or too little

International research supports decisions that tend to be **more risky than those relating to a single home market**. Researchers now face two major challenges: the first is how to deal with **information proliferation**, the second, is how to cope with **absence of information** in specialist niches.

Globalisation of business is the source of these two related issues. With the major structural shift in economic development that is assigning much of the **growth to the Asian region**, large, and not-so-large companies are having to learn about new geographies and relationships either to collaborate / compete with established players or to discover and develop new niches where little or no demand already exists. **One research technique is becoming rapidly re-habilitated, a second is being rapidly developed**. I propose to present two 'mini-cases' to illustrate this.

In the first case we may have to detect the 'signals' from the 'background noise' in a well-developed business sector in which there is ample data. The sector is insurance; the product group is commercial property cover. The extent of public data on this business is truly amazing and in addition there is a vast store of multi-client studies and medium-priced open-market publications.

The problem is too much information and it is presented on a national or regional basis – starting from the value of assets insured in a given geography. The problem with this is that globalisation has fundamentally altered the way in which we have to look at commercial property insurance. What matters strategically is not the insurance of geographically-based assets but the value of all decisions made in a country.

Many, if not most, multinational and global operations negotiate their business centrally and in many countries the **'decision value'** is vastly greater than the earnings from assets insured in the country in question (Singapore and Hong Kong are extreme examples of this).

Our problem is how to convert and re-locate the basic conventional premium statistics into **'decision values'**. It is impossible to build this bottom-up - we need a top-down approach. We return to the well-known technique of top-level face-to-face interviewing amongst insurers, with guaranteed anonymity and avoidance of disclosure of individual company data. The executive interview technique has fallen into unpopularity in recent times, globalisation and decision value migration have **brought about a re-habilitation**.

In the second case we may be opening new opportunities for companies of varying sizes – involving new products / services in new markets for which **no data exists**. Recently, I researched a 'non-existent' market – specifically specialist plant hire in a mainland European country. There was no equivalent of my client's business in this market.

Having checked that there were no legal constraints, it was simply the case that nobody had yet thought of building a business in this highly specialist field. There was, however, a healthy and growing crane hire and plant hire sector. The economic structure was amenable to the type of branch-based activity that characterised this broader business – but no data on which we could make a go / no go decision.

The biggest problem would be pricing and speed of business build to break-even, since the capital cost of the equipment range would be very high relative to first-phase turnover and operating cost.

Analogue modelling came to our rescue. By comparing price levels for several types of crane and a number of items of contractor's plant, the ratio of daily / weekly / monthly rates in the new country compared with the United Kingdom was exceptionally closely correlated across the product types – in fact 1.9 to 2.2:1.

This gave us the basis for a financial calculation on which the go / no go decision was based, along with other factors such as a qualitative assessment of the risk of emulation by other companies. Sector and geographical priorities were relatively easy to rank on the basis of the very detailed data on economic structure and prospects for the sector.

Dr Daniel Park is a multi-lingual economist who has undertaken projects in 57 countries worldwide. He is a former honorary professor of economics.

Dan Park planned to give a paper on this subject to the **AIMRI conference in London on 1 July 2011** but has been called away on client business.



Dan Park
MASS Consulting Group
Manchester