

Where have all the delegates gone?

Dear All,

I recently returned from the annual ESOMAR Congress in Montreux and was struck by the reduced numbers of delegates attending this year; in fact there were less than half the usual numbers. Looking at the countries represented the UK was just ahead of the USA with the Germans coming in third. The Dutch, as usual, punching above their weight come close behind the Germans in terms of numbers of delegates and exhibitors.

Whereas in the past companies would send two or three delegates to ESOMAR this year many sent just one, the decision maker. It was good to catch up with AIMRI members from across the world and it was very interesting to meet Rafiq Kakar who had come from Afghanistan. He had some fascinating insights into the MR process in that country, dealing with the current difficult times and getting interviews. There were very few representatives from the big companies in our industry which is disappointing. This must be a sign of ever-tightening budgets and cost cutting.

There was an interesting board game presented by Blauw offering a new way to brain storm and develop new ideas. As you might expect the online world was strongly represented and we saw the emergence of a new type of panel – the Custom Panel. This a less expensive option compared to normal panel and gives companies better access to their customers and what they are thinking. In fact we

Looking ahead to Rome

have Charles Pearson from EasyInsites presenting a paper on this topic at our next conference in Munich at the end of October.

Our conference coincides with the Research & Results exhibition so there will be plenty of researchers in town. I am looking forward to welcoming members to our conference. We will be discussing **niche markets** with presentations from George Head, Sample Answers, Fritz Brandes, FBI, William Hardiman, Eurointerview, Peter Bennett, London Translations as well as Charles Pearson of EasyInsites.

For our conference in Rome in early March we will return to the theme of **panel research**. This topic has always led to lively debate when featured in our previous conferences for example in Wiesbaden, Vilnius, Roquebrune, Como, Paris, Krakow, Montreal, Athens and Edinburgh.

I see that online advertising expenditure (broadly defined) has increased by 5 % year on year while overall advertising fell by 16%. This will be good news for online research companies. We are approaching perhaps the busiest time of the year following a fairly quiet summer and I hope you have a prosperous time until we meet again.



John Mackay,
Chairman

Next AIMRI meeting

The spring 2010 AIMRI meeting for members will be in Rome on Friday, 5 March 2010. The subject will be:

“Panel research revisited”

Rome, Italy is one of the most popular tourist destinations in the European Union. Visitors come from around the world to see world-famous landmarks such as the Colosseum, the Forum and the Pantheon. Other popular sights are the Trevi Fountain, the Spanish Steps and the Piazza Navona. At the Vatican there is St Peter's Cathedral and its beautiful dome.



Rome - see page 2

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Are research panels the answer?

The spring 2010 **AIMRI** meeting for members will be in Rome on Friday, 5 March 2010. The subject will be:

“Panel research revisited”

How are panels formed and administered? What are the advantages? Can we be sure that the panel is representative? Can research methods be mixed? Problems with overlapping panels. How to retain the enthusiasm of the panellists?

Rome

Rome Italy is one of the most popular tourist destinations in the European Union. Visitors come from around the world to see world-famous landmarks such as the Colosseum, the Forum and the Pantheon. Other popular sights are the Trevi



Fountain, the Spanish Steps and the Piazza Navona.

At the Vatican City, visitors can visit St Peter's Cathedral and enjoy its fountains, statues and the beautiful dome. At the Vatican Museum, you won't want to miss the masterpieces by Leonardo da Vinci and Raphael or the Sistine Chapel.

The hotel for the **AIMRI** meeting will be announced soon.

Rome's two main airports are Leonardo da Vinci (Fiumicino) and Ciampino.

This will be another fascinating event in an unique environment. **For more**

information please contact Richard Chilton (tel +44 20 8780 3343).

Targets for researcher skills

The autumn **AIMRI** meeting will be in Munich on Friday, 30 October 2009. The subject will be:

“Understanding niche markets”

How do you reach specialised groups... a key market research activity, whether it be consumers of luxury items or enthusiasts for sports & pastimes or businessmen or whatever? The narrower the segment the greater the sampling difficulties and the more specialised the techniques.

Munich

The conference will be in the comfortable 4 star **Platzl Hotel**, located next to the famous Hofbrauhaus and within immediate proximity to the Marienplatz, the Bavarian State Opera, Maximilianstrasse and the Viktualienmarkt.

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.



Our conference will come just after the **Research & Results 2009 Market Research Exhibition** (28/29 October) - also in Munich.

This will be another stimulating event in an historic environment.

For more information please contact Richard Chilton (tel +44 20 8780 3343).

2010 Insight Show

The 2010 Insight Show will be on 29 - 30 June and **AIMRI** will again host the International Village at Olympia, London.

Those wishing to take part should contact David Mallett - Sales Manager on Tel +44 20 7970 4471 or email david.mallett@centaur.co.uk

A Rolling Annual Plan

In future **AIMRI** will publish a rolling annual plan for the meetings for members.

Dates and venues (tbc = to be confirmed)

Date	Hotel	Venue	Airport
Fri 30 October 2009	Platzl	Munich	Munich
Fri 5 March 2010	tbc	Rome	Rome
Fri 11 June 2010	tbc	Amsterdam	Amsterdam

Subjects:

For October 2009 the subject is:

“Understanding niche markets”

For March 2010 the subject is:

“Panel research revisited”

Credible Research in Afghanistan

Nearly three decades of war and conflict has left post-Taliban Afghanistan with daunting political, administrative, social, and economic challenges. To overcome these challenges, particularly since the Bonn Agreement in December 2001, the utmost demand for credible and high quality research has been at its peak to provide:

- Reliable data to inform policy makers;
- Public opinion to inform decision makers in reconstructing and developing the country;
- Public views on the rehabilitation and improvement of the infrastructure;
- Public support for and expectations from the United States, NATO Forces, the International community and the Government. of Afghanistan.

In the year 2005 the dream of establishing ORCA was born in the hearts of five Afghans who possessed technical depth along with professional breadth, leadership and research skills.

On many occasions clients' expectations regarding the quality and integrity of the data were not adequately addressed. This has been the main reason why ORCA entered the Afghanistan research arena with a view to improving the situation.

Building the capacity

So far, ORCA has built up a team of over 750 Afghan men and women with the capacity to conduct opinion research surveys in all provinces of Afghanistan. They have all read and abide by the WAPOR Code of Professional Ethics and Practices.



Female interviewer in Paktia Province

Despite being an Afghan Research Company who know Afghan culture and traditions very well, we had to develop many working solutions for most of the research challenges in the country, particularly in areas that are still led by the Taliban and Al-Qaeda; where extensive illiteracy, hostility to research and strict cultural constraints exist.

Giving a voice to the people

Despite having been detained, imprisoned, injured in bomb blasts, faced with Taliban leaders and other sorts of safety risks and cultural constraints, the ORCA team is working tirelessly to give a voice to the people of Afghanistan and establish a culture of research in this country that has been through the tragedy of war, fighting, deep suffering and prolonged conflicts.

Consider how we tackle the problem of violence on the roads (some of which are controlled by the Taliban):

- We have contracted local bus / truck drivers to carry the survey instruments;
- The bus / truck drivers pack the questionnaires in hidden areas (eg. in a crate of grapes or in a mobile-oil carton);
- Our supervisors travel separately so that they have no document or proof;
- They erase their mobile phone's phonebook;
- ORCA have purchased golden serial phone numbers for all to be in touch with each other.

For other examples of how we surmount problems please see page 7.

Looking ahead

We hope for a day to toss away the weapons of war and give our children the hope of a peaceful, loving and beautiful Afghanistan and to join hands together with the rest of the world and accept one another regardless of the skin color, ethnic divisions, religious or nationality.



Rafiq Ullah Kakar
Opinion Research Center of Afghanistan (ORCA)
Kabul

Eight new members

Acorn

We are the only independent, truly Asian, marketing research group with full service operations in Singapore, Malaysia, Hong Kong, China, Thailand, Taiwan, Korea, Indonesia and Vietnam.

Since our inception in 1985 we have held one belief – we are in the business of helping our clients understand consumers.

Be it planning marketing strategies, developing new products or communications, or crafting brand architectures, our belief is that everything flows from a deep and honest understanding of consumers' complex needs and desires. Most research companies collect data but if you want consumer insights to guide strategic marketing decisions, just go to Acorn.

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EasyInsites

EasyInsites is a new and exciting full service online research agency focused on offering our clients a range of easy yet innovative online tools to meet their research needs and to allow them to conduct more research at a lower cost.

One of our key products is EasyPanel, our custom panel product with which clients can easily conduct research on their customers, consumers or markets. Our EasyExchange platform is at the heart of our EasyPanel product offering. One of its main features is the ability for clients to monetise their panellists by opening their panel to other researchers, with all appropriate restrictions and limitations set by our client as the panel owner. Panel owners then receive payments each time their panellists are used for other research projects.

These payments are substantial enough to reimburse them for a considerable portion of their own research spending.

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Forbes Consulting Group

The Forbes Consulting Group was founded in 1985 to pursue the application of psychological theory and analysis to the solution of strategic business problems. Over the past 20 years, we have become a valued resource for Fortune 500 companies globally.

Our mission as a company is to offer our clients deeper, more profound levels of insight about needs and motivations – and to help them gain strategic market advantage on the strength of this insight.

Our international research experience at Forbes is built upon a strong sensitivity to how cultural differences affect research and business strategy. A long track record of mounting large, complex international projects has also taught Forbes how to meet the logistical challenges of your global learning needs.

A 96% client retention rate is perhaps the best testament to our success. Excellence at Forbes is not a goal, it's a standard.

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Market Dimensions

We are a full service market research company, specialised in Quantitative and Qualitative Research studies. Our clients have recognised us as leaders in Ethnic and New Canadian Research Services. With the help of 10 senior research executives that individually have over 10-15 years of market research experience in diversified disciplines, we execute and deliver studies in English and French across US and Canada.

We maintain a large database of Chinese and South Asians and have the capacity to conduct interviews, recruitment and moderation in Mandarin, Cantonese, Hindi, Urdu, Punjabi, Bengali and Arabic. Also, we house two state-of-the-art focus group facilities in Toronto with video streaming service.

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See also the back page - a preview of the Munich conference, where Charles Pearson is speaking.

in six countries

Rahbargroup

RAHBAR is a full service independent marketing research company, with its primary market based in IRAN. It was established in Tehran in 1997 and has grown to become one of the leading IRANIAN research agencies with over 35 full time employees, over 40 casual employees and offices in Tehran and other major cities.

Clients include Shell, Philips, Samsung & Unilever.

Rahbargroup

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Susan Bell Research

Susan Bell Research is an independent consultancy based in Sydney, Australia with extensive research experience in financial and professional services, food, the arts, community attitudes and toys. Sue herself is also a highly experienced conference / workshop presenter. She presented at the Australian Market and Social Research Society (AMSRS) 2009 Summer and Winter Schools, and has delivered highly-regarded papers at six AMSRS Conferences.

Sue blends extensive on-the-ground experience with a deep interest in the theoretical side of qualitative research. Twenty years ago, she pioneered the use of semiotics in research. These days, she is exploring how researchers can benefit from discourse analysis and pioneering the use of qualitative research methods for financial disclosure testing.

Sue is the Chair of the NSW Division of AMSRS and sits on the AMSRS National Council. She is past Chair of the Independent Researchers Group and past AMSRS Conference Chair.

Sue was born in England, and graduated from the University of Reading with Honours in English and Linguistics, and later gained a Graduate Diploma in Psychology from Monash University.

As a member of AMSRS, Sue complies with the AMSRS Professional Code of Behaviour.

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2Europe Ltd

2Europe was established in 2004 and developed from Resource Marketing Research which the owner, David Bacon, ran from 1992 to 2004.

The key benefit of 2Europe to **AIMRI** members is the international CATI support. The CATI call centre is now located in Scotland and 2Europe is proud of the fact its European CATI costs today are about the same as they charged in 2004 with their former in-house CATI centre in Barnet, North London. Today the CATI quality control is exceptional with quite complex business to business, financial and healthcare projects regularly taking place in addition to high volume consumer studies.

2Europe has two separate business streams: enterprise clients and agency / consultant support services. The support services include research design; field support throughout Europe; translations; data support; analysis; reporting and project management.

In effect, 2Europe provides a single point of contact for all quantitative marketing research support throughout Europe.

2Europe Ltd

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AIMRI meets in Edinburgh

The AIMRI meeting held Friday, 12 June 2009 took place at the Royal Terrace Hotel in Edinburgh. The topic of the conference was “**New trends in qualitative research**” which was covered through seven interesting sessions.

The first paper “**Online qualitative groups, blogs, online research communities, bulletin boards... what do they mean?**” was presented by **Jo Densley from EBOX, Scotland** and **Robin Shuker, BIA Research, London**. Jo and Robin started off by giving us an overview of the recent developments in online research methods. We saw examples of how user-friendly bulletin boards can be used to gather data from hard-to-reach respondents and other target groups. The growth and role of online communities was discussed. And it was explained how and why online focus groups can be an excellent alternative to traditional focus groups. Jo and Robin offered to conduct one online focus group for free for AIMRI members.

Session two was about mixed methods “**Combining telephone interviewing with online focus groups.**” **Clare Wade from Mindspace, Scotland** told us how she has obtained good results by combining telephone and web. On the phone, respondents and the moderator can hear each other and there is no delay on the audio as it is often the case with web-based calls. While the telephone meeting is going on, the web is used to show pictures and complete tasks presented by the moderator. Clare also raised the question whether the research industry is more excited about new methods than the clients who often prefer to do it the traditional way.

After the coffee break **John Clay from Research 4, UK**, presented a paper on social media platforms and asked the question: “**Can they complement research?**” Things don’t stand still and social media like **Facebook** and **Twitter** have seen a tremendous growth in number of users. It is a fact that there is a shift towards online research methods. John showed examples of how for instance **LinkedIn** can be useful for competitive intelligence, and how social media is another valuable tool to enhance market and customer insight if used appropriately.

In session four **Adam Gac from Healthcare Landscape, London** talked about the topic of blog analysis in healthcare “**It’s not rocket science – it’s relationships...**” **Herbert Höckel from mo’web research, Düsseldorf** should have been co-presenting this paper, but unfortunately Herbert had problems with his flight connection so Adam had to cover the presentation on his own, which he did well. Adam explained how they have developed a system in which respondents who are screened out are invited to take part in a blog on the same topic. Also, a new tool for blog analysis, **BLOGIQ**, was demonstrated. It is used to illuminate the hidden facets of brands, products or topics. Adam concluded that blog research is an insight rich and now robust methodology.



Edinburgh castle

It is always good to learn from real cases and **Neal Sandin from SIS International Research, New York** presented one under the title “**A successful project for a budget retailer.**” Step by step Neal took us through all the phases from methodology overview to conclusions and recommendations. It was interesting to hear about the challenges that SIS had to face in the process and how they were dealt with in order to fulfil the purpose of the project.



Royal Terrace Hotel Edinburgh

After a nice lunch in the hotel restaurant, **Jo Fawcett from George Street Research, Edinburgh** presented a paper on “**Research among financial advisers and other business contacts.**” Jo identified the different barriers a researcher had to confront in order to do proper research among financial advisers and other professional audiences. The use of rewards and benefits for participation was discussed and results from a real case study showed the motivation factors and benefits for each stakeholder in the research: the respondents, the client and the researchers.

To end the day AIMRI member **Michael Zhao from CBC Marketing Research, Shanghai** gave us an insightful presentation on “**How qualitative research is developing in China.**” The current spend on MR in China was estimated to 750 million USD in 2008 and a growth of 12-15% is expected in the future. 83% of the research

Surmounting difficulties in Afghanistan

Challenges	Solutions
Outdated Census: <ul style="list-style-type: none"> Annual updates by the Central Statistics Office are used by Government. and the international community 	<ul style="list-style-type: none"> It is the only available official census The Government. is trying to conduct a new census ORCA is trying to raise funds to conduct such a census
Lack of capacity: <ul style="list-style-type: none"> Nearly 70% of the population is illiterate 80% of women are illiterate 	<ul style="list-style-type: none"> Recruit Afghan men and women who have at least 12 years of formal education We prepared standard interviewers' training manuals in local languages Gain experience with multiple nationwide surveys every month Questionnaire design and wording should be as simple as possible
Violence in the Government influenced areas: <ul style="list-style-type: none"> We estimate that around 60% of the country is under Government control 	<ul style="list-style-type: none"> ORCA was granted an official letter by the Ministry of Interior to all Police HQ to support our field teams
Violence in Taliban influenced areas: <ul style="list-style-type: none"> We estimate that nearly 40% of the country is controlled by the Taliban to a considerable extent Interviewing is considered a suspicious activity and armed Taliban discover it immediately through their local channels 	<ul style="list-style-type: none"> ORCA has established contacts with tribal leaders who are respected by both the Government and the Taliban ORCA implements small development projects (eg. provision of education to disadvantaged children) out of 10% of our profits Being pleased by our social services, the tribal leaders obtain clearance from the Taliban
Ethnicity / Language: <ul style="list-style-type: none"> Very diverse country dominated by Pashtuns but non-Pashtuns are more powerful today Many ethnic rivalries and enmities within provinces and regions 	<ul style="list-style-type: none"> The field team is multi-ethnic and multi-lingual. They are local and belong to the same ethnicity as their respondents Within a particular province, ethnic rivalries are taken into consideration
Gender: <ul style="list-style-type: none"> Serious cultural constraints on access to women Easy access to households (men) 	<ul style="list-style-type: none"> ORCA's field network includes nearly 300 experienced female interviewers ORCA's interviewing is gender specific with female interviewers interviewing only females and males interviewing only males

Notes provided by Rafiq Kakar - see also page 3

continued from page 6

conducted is quantitative, 15% qualitative and 2% other. Focus groups and In-depth interviews are well established and widely used qualitative methods. Online research is not popular yet. Of a population counting 1.3 billion people only 240 million had internet access by the end of 2008 and 640 million had a mobile phone.

In the evening we had the pleasure of dining at the **Royal Overseas Club on Princes Street** with a great view to the impressive Edinburgh Castle. As usual this was an

excellently arranged **AIMRI** meeting with a lot of good presentations, Q&A sessions, informal discussions and networking between members.

Johnny Heinmann
Analysegruppen
Denmark



Building panels in niche markets

Niche markets typically require a custom panel solution, in large part because these markets are low incidence and it is often difficult to recruit and engage individuals in on-going research. Some examples include expectant mothers or mothers with babies and young children, high net worth individuals, specialist or high level professionals such as IT decision makers and C-Level executives, ethnic minorities and those who have specific dietary requirements.

How does one begin to build these types of panels? There are several key elements that need to be considered when pursuing this goal.

Source for recruitment

When building a panel for a niche market, there needs to be a source for recruitment. This is typically a website that is frequented by that particular market, or a database that has been built by a company who provides products or services to that market. **The panel should also be built and owned by the owner of the source for recruitment.** This reinforces the relationship and contributes to better response rates and lower attrition.

Without the source, the costs for finding and acquiring these people will likely make the panel build cost prohibitive.

Customised panel look, feel and language

By definition, these panellists will be unique from the general population and have a lot in common with one another. A generic approach to the look and feel and language will not work well, these panelists will want to feel a part of something that is relevant to who they are, their core needs and their expected mode and style of communication. The colours and images used throughout the process of inviting, profiling and interacting with them should be familiar and consistent with how they live their lives.

The solution for many niche market research problems

Relevant engagement and research opportunities

It is critical that the types of research these panellists are expected to complete are primarily focused on the reason why they joined the panel in the first place. For example, if the panel is comprised of expectant or new mothers, sending them surveys on travel for single adults or sports cars is not likely to be of interest or consistent with their reason for joining this panel at this time in their lives. In this example, the primary focus for research directed at these panellists should be associated with the products and brands needed for raising their children or managing a household with children. Even cars and financial services products that are closely aligned with this particular niche market would not be very appropriate as research topics.



Munich

Not necessarily expensive

Building panels in niche markets is not necessarily an expensive endeavour. If you own a list or have a database of customers, consumers or a website that attracts those who meet your desired niche profile, then this is an excellent starting point for building a panel. With a Panel Exchange approach where the panel is made available to

other researchers to use, there is also

the opportunity to monetise these panellists thereby providing a revenue source for you as the panel owner to help compensate for the cost of building and maintaining the panel. With niche markets, these panels typically command a very high CPI (cost per interview), so there is likely a money making opportunity for panel owners that can also help fund your own research program.

Charles Pearson will be speaking at the AIMRI conference in Munich - 30th October 2009 - for EasyInsites see also page 4.



Charles Pearson
EasyInsites
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