a.i.m.r.i.

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WHAT'S INSIDE

St. Paul's Cathedral, London - see page 2

DATES & VENUES:

Date	Meeting at	Venue	Airport
Mon, 3 Jun 2013	CNA Conference Centre	**Paris**	Paris
Fri, 11 Oct 2013	Perspective Research Conference Room	**London**	London

SUBJECTS:

For June 2013 the subject is:

"Meeting the challenge of difficult research assignments"

For October 2013 the subject is:

"What is happening in qualitative research?"

REACHING OUT TO THE DEVELOPING WORLD

I hope you are all well and business is good. I am looking forward to the summer here in London after a winter that seemed to go on and on.

We were all pleased to see some sunshine in Barcelona at the beginning of March where we discussed **"Getting ahead in the battle for global growth"** hosted by our friends Estudio Silvia Roca and Netquest who are based there. We had delegates from the UK, Germany, USA, Sweden, Italy, Spain and Portugal and a new member from Nigeria who gave an illuminating talk on MR in his country and the particular obstacles he had to overcome.

It is with great reluctance that I am relinquishing my chairmanship of **AIMRI** after five years and I would like to thank my council and members who have ably supported me over these years. Particular highlights have been our first meeting in the USA in April 2012, Munich after **Research and Results** in October 2011 and dinner in Montreux during ESOMAR in September 2009.

We have also launched our new website which I hope you will find much easier to navigate. There have been so many other events where I have been privileged to meet members from around the world and hear interesting papers. It has been a pleasure.

It is more important than ever that in these difficult times we should promote ourselves harder than ever by encouraging new members to join and ensure the long term future of our unique association.

Over the last year we have gained 13 new members from 10 different countries - i.e. Brazil, France, Germany, Ghana, Nigeria, Sweden, Thailand, UAE, UK and USA. This is an impressive list and it is encouraging that the **developing world is well represented.**

Our next event will be in Paris on 3rd June where we will be discussing **"Meeting the challenge of difficult research assignments"** which promises to be an exciting affair and we are planning a social event alongside the conference, watch out for the details on the website.

Following Paris we will be back in London in October where our treasurer Richard Sheldrake will be hosting a conference focusing on **qualitative research** which we have not touched for several years.

Once again, I would like to thank Richard and Catherine who do all the work behind the scenes making it all possible.

I have had a most enjoyable five years and wish my successor all the best and hope he enjoys his term as your chairman.

John Mackay
Chairman

QUALITATIVE RESEARCH REVISITED

The AUTUMN 2013 **AIMRI** conference will be in London on Friday, 11 October 2013. The subject will be:

"What is happening in Qualitative research."

Among the topics to be explored will be the following:

- Current best practice in online qual
- Selecting the most appro priate methodology
- Handling national and regional differences in qualitative research
- Qual on the move: new applications for mobile research
- Trends in ethnographic and observational research
- Social media, blogs and online communities
- Combining qualitative and quantitative approaches

With new techniques and methodologies, the increasing use of online platforms and the emergence of mobile applications and social media research, a lot is going on in the world of qual. While traditional focus groups and in-person IDIs continue to dominate, qualitative researchers now have an **ever-wider range of approaches** at their disposal to provide insights for their clients.

The conference will examine current trends and examine some of the opportunities and challenges presented to the qualitative market researcher.

The conference will be supported by the **Independent Consultants Group.**

Conference location
The conference will be held in the conference room at **Perspective Research** in Holborn, London**.**

We will select a conference hotel in the same area - convenient for visiting the British Museum and the Tower of London, for example.

This will be another stimulating event in an unique environment. For more information please contact **Richard Chilton (tel +44 20 8780 3343 email rtchilton@virginmedia.com).**

Tower Bridge, London

DIFFICULT RESEARCH ASSIGNMENTS

The SUMMER 2013 **AIMRI** conference will be in Paris on Monday, 3 June 2013. The subject will be:

"*Meeting the challenge of difficult research assignments."*

Among the topics to be explored will be the following:

- Finding ways to cut costs
- Using mobile research in India
- Complications from the mixing of research technologies
- Finding difficult to research respondent groups
- Use of CATI in difficult situations

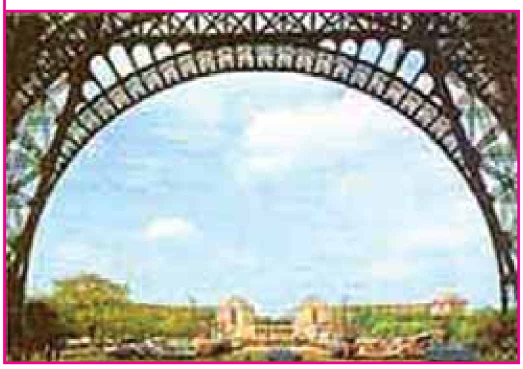
Paris
Everyone who visits Paris probably has the same list of major attractions to hit: The Louvre, Notre Dame, The Eiffel Tower, etc. Just make sure you leave some time to wander the city's grand boulevards and eat in as many cafes, bistros and brasseries as possible. Plus, don't forget the shopping - whether your tastes run to Louis Vuitton or the flea market, you can find it in Paris.

Happily, many of Paris' most famous landmarks are relatively close together and there are a variety of ways to see the most well-known sights. The Seine River flows through Paris and is treated almost as if it is an 'avenue' of the city.

Conference location
AIMRI has selected the very elegant **CNA conference centre** (Cercle National des Armées) as the conference location. This officers' club has now opened up its facilities to other organisations.

This will be another memorable event in an agreeable environment. For more information contact **Richard Chilton (tel +44 20 8780 3343 email rtchilton@virginmedia.com).**

Eiffel Tower



MOBILE RESEARCH TECHNOLOGY IN EMERGING MARKETS

90% of the market research data in India is still collected with paper and pencil. Only a few companies work with mobile technologies. But Indian market research companies can benefit a lot from the use of mobile survey software.

Doing market research in India is very demanding: the country's geographical size, heterogeneous target groups scattered over thousands of kilometers, the great variety of languages and cultures and the very different level of education make representative market research very challenging.

Market Xcel Data Matrix Pvt., **(AIMRI members** and one of India's biggest market research agencies), show how mobile market research technology helps to overcome India's major stumbling blocks in the market research world. While about 90% of the domestic data collection work in India happens through face-to-face paper and pen based approach, there are pioneer companies who have been using mobile technology for the last two years and now benefit from **better data quality, easier to manage fieldwork, lower costs and faster results.**

Specialized in face-to-face data collection using quantitative and qualitative approaches for consumer goods, retail and automotive industries in India and abroad, Market Xcel wanted to test how the advantages of mobile market research could be used in the Indian market. To keep the hardware costs at manageable levels the software had to be available for Android devices. Market Xcel settled for **mQuest**, a market research software developed by the **German cluetec GmbH.**

More efficiency and control

Market Xcel is currently using over 450 tablets and the advantages of the mobile technology are very clear: managing fieldwork over large distances became easier and the quality of data could be enhanced. Functions like GPS tracking, time stamps built into the questionnaires or the obligatory photography-upload improved the control of the fieldwork.

The ability to transfer directly the gathered data to the research agency's server via online interface accelerates data availability and permits permanent field control. The questionnaires can also be filled out much more comfortably compared to paper and pencil, and also the data aggregation is more effective. Moreover, the fact that gathered data can now be transferred easily via online interface directly after finishing the interview or the survey helps to solve a logistic problem as courier services are not very reliable in India. So the mobile technology has helped to cut down transit time and improved the process overall.

Offline capabilities to be independent from 3G network

In order to be suitable for the Indian Market, the mobile solution needed to be used offline and online. Just like in other emerging countries, there are still white spots in terms of 3G coverage or WiFi hotspots in India. So it was of the utmost importance to Market Xcel that data could be gathered and saved offline and independent from internet access. As there is no Indian provider that offers complete coverage over the entire country – which results in the necessity to have contracts with various providers and high roaming costs even for domestic usage – a big infrastructural problem could be solved.

Technology abandons traditional work flows in India

Mobile research technology brings high potential and a lot of room for improvement to make India's market research industry more successful and competitive. Moreover, mobile research solutions provide research data of higher quality for the Indian market. This is not only valid for India but also for many emerging countries. Compared to the traditional work processes in India, market research projects benefit tremendously from using technology. Market Xcel is now committed to the advantages of mobile market research and plan to extend the usage of the technology.

Market Xcel describes in a very detailed way how technology changed their work positively:

http://www.cluetec.eu/references/case-studies/mobile-research-india/

Jan Schöttelndreier will talk on this subject at the AIMRI conference in Paris on 3 June 2013.

Jan Schöttelndreier
cluetec Gmbh
Karlsruhe, Germany

THE BATTLE FOR GLOBAL GROWTH:

AIMRI MEETS IN BARCELONA

On Friday, 8 March 2013 the day started at 09:30 in the hotel NHCalderon situated in the heart of Barcelona, close to Catalunya Square. The delegates arrived and everything was ready for an interesting **AIMRI** meeting called **“Getting ahead in the battle for global growth.”**

Conference Chairman **Michael Stanat**, coming from the USA, welcomed the 20 delegates to the conference and introduced the first lecturer, **Martha Llobet.** She has a wide experience working for different market research companies such as TNS UK and Millward Brown, and is now working for **Estudio Silvia Roca (ESR)**.

Her presentation was about the importance of **“Taking the global view”** and she focused on the region of Latin America. Moreover, she added some interesting facts about countries in the region, such as: Peru is one of the leading countries in the fishing industry, Colombia supplies 90% of the world production of emeralds, the first World Cup was won and hosted by Uruguay... And so, she said that we do not have to assume similarities in between those 19 countries that compose South American. Martha presented Mexico and Brazil as the two most relevant Latin America countries in the Market Research industry, detailing that they are in the 12th and 8th places of international research markets, respectively.

In addition, she explained some peculiarities about Mexico and Brazil. On one hand she said, Mexican people are very concerned about security and that’s why up to 70% of respondents fail when answering questions about personal information (post address or telephone number). Another relevant fact is about the cell phone penetration in the country, which is really high, although it is still expensive. Apparently, only 17% of the total Mexican population are able to log on to the internet.

On the other hand, Brazilian people are optimistic, love to feel important and think high incentives are needed. With them only short surveys should be conducted (no more than 20 minutes long) but a researcher can easily get useful information and access to many different sectors of population.

The next presentation came from **Catherine Delcin**, who is Managing Director of **Delcin Consulting Group** headquartered near San Francisco. Her subject was **“Policing the bargain of outsourcing.”** There are opportunities for the market research industry in this area. In order to ensure the financial health and continued growth of our economy we need to recognise trends such as outsourcing and maximise their benefits utilising our existing systems for market research. Trends indicate that outsourcing has become a prevalent means of managing costs. Generally, it involves relegation of a company’s perfunctory or specialised obligations to a third party.

Catherine explained the importance of the Life Sciences sector which includes Pharma, Biotech and Med Devices she added that last year Life Science firms spent 30% of their annual income on legal settlements. The main industry trend in this area is the rising demand for new drugs in Asia Pacific and Latin America.

Catherine added a quote from the writer Stephen Covey which says “Management is efficiency in climbing the ladder of success: leadership determines whether the ladder is leaning against the right wall”.

The following lecturer was **Michael Stanat**, the Conference Chairman, who is Global Research Executive at **SIS International Research** (Asia Pacific) and an expert in China’s market as we can deduce from his authorship of the book called **"China's Generation Y: Understanding the Future Leaders of the World's Next Superpower"**. Stanat started his speech, called **“Global transformation: how research can meet the needs of a rising Asia”**, with China’s most important facts and trends: the world’s 2nd largest economy, the emergence of the middle class, the reduced growth, the new emphasis on consumption, the growth of 18% in the luxury market… He emphasised the opportunity in China’s e-commerce as it is increasing thanks to the Internet penetration; it is the world’s biggest smartphone country, the social media is in right now and there exists a consumer loyalty.

“Be not afraid of growing slowly, be afraid only of standing still”

Barcelona

AIMRI MEETS IN BARCELONA CONTINUED

However, there are still difficult challenges to go through in this Asian country. The economy is improving, but its evolution is slow. There are cultural and traditional norms which are real barriers for market researchers. And there exist many HR hurdles such as: intellectual property, ageing society, domestic competition…

In conclusion, China's economy is in transition, with increased development. In the end, Michael cited a Chinese proverb "Be not afraid of growing slowly, be afraid only of standing still".

Lecturer **Joaquim Bretcha**, Sales Director Europe at **Netquest** came after Stanat. Bretcha started working in the mass consumer sector (Carrefour, Auchan and Aecoc) and later on he developed his professional career in market research companies such as TNS and Synovate. His presentation **"Keys for a real takeoff for online research in LATAM"**, was focused on the Latin America region and he introduced it saying that Brazil, in this region, in terms of market research, is equivalent to Italy in Europe, as the Portuguese speaking country has more than the 40% of the total amount of market research industry in the Latin countries.

Mexico is equivalent to Sweden, covering 20% of the industry and Colombia to Turkey, which is in the 3rd position in the ranking followed by Argentina. Despite these positive facts, there is a huge challenge in this region which is: **online market research.** In order, Argentina (66,4%), Colombia (59,5%), Chile (58,6%) and Brazil (45,6%) are the top four countries in terms of Internet penetration in the last year. Internet is getting slowly to the region but online market research is not advancing simultaneously.

All of this leads to a kind of 'the chicken or the egg causality dilemma': no panel means no local demand, no local demand means no panel. Foreign online-experienced researchers are currently demanding online samples in Latin America but, without higher local demand, Latin American panels cannot deliver hard-to-reach targets. Bretcha then revealed the four things that could break the current dynamic: tackling the 'social class' problem recruiting low social class population, mixing methodologies, invest in growing the panel to promote demand later and taking advantage in the definite takeoff of mobile Internet (solving at the same time the lower class access to the internet).

His ending was to get to these different countries through local knowledge, because Latin America is a region, but not as 'uniform' as we think so a deep knowledge about the region is needed.

After the Netquest exposition delegates gathered in the hotel's dining room to have lunch and exchange opinions about the industry.

At 15:00 they returned to the conference room to listen to **Sola Akinnagbe**, Group Managing Director at **Market Research Consultancy Ltd**, Lagos. The Nigerian expert started his speech joking about Africa and saying it was not a country. He added that the 7.8% of the world's Internet users are African people, where the top Internet countries are: Nigeria (45%), Egypt (21%) and Morocco (15.6%). Afterwards, Sola made his observations about the Nigerian consumer: 86% of the Nigerian population (120,000,000 people) are in the low social class, 60-65% are rural population and nearly 51% do not have daily access to TV.

All of these facts shape the habits and trends in the country, where shopping behavior is more concerned about volume than quality, and the consumers will search for acceptable quality at a reasonable price taking advice from the retailer. Nigerian people like to chat and gossip with neighbours, love to enjoy social gatherings and follow the recommendations of opinion leaders. They are very religious too and respect the opinions of the religious leaders.

The major challenges in the African country are: cultural differences (religion, ethnicities, traditions, gender equalities and marriage…), diversity of languages, infrastructural ways of communication and environmental hitches… The current situation though is that face-to-face (CATI) surveys have already started to take place, printing surveys is too expensive and there are lots of difficulties in making surveys on phone due to a lack of lines.

Continued on page 6...

"In the LATAM region... online market research is not advancing very fast"

Joachim Bretcha
Netquest, Barcelona

Finishing with the last presentation called **"Respondents are people too!"** by the hand of **Nik Harta, Director at Opinion Matters** coming from the UK. Nik began his presentation talking about the importance of the technology as it has allowed people to cross borders. Moreover, he said that we are now facing another cultural change, as the technology enables us to save time and money, enjoy more choices and broadcast our opinions… In the EU there is a 57% smartphone penetration, which is increasing speedily.

Nowadays, respondents (consumers) have the power and that is why we ask for instant access, positive experience, customer service and instant engagement. In fact, we are creatures of habit as we always re-visit the same five or six websites and we are so 'predictable' even when evolving.

Harta, added that as the phone companies puzzle over their future business model, pollsters are starting to wonder about their own ability to continue in a world without land lines. He also said it was so relevant to look for different ways to engage the audience through hobbies, sports, news, socialising and creating a tone and style to match your target audience. Nik Harta concluded his speech with a last consideration **"Don't be afraid to innovate and try new things**, ensure it works and hope the audience has enjoyed the experience... **leave them a reason to return and say thank you"**.

AIMRI MEETS IN BARCELONA

...Continued from page 5

Review by Joachim Bretcha

Barcelona Port

NEWS FROM BRAZIL

Brazil has an influx of new US, Euro, and Asian B2B and B2C firms, attracted by imminent mega-events (2014 World Cup, 2016 Olympics...), 10-digit infrastructure projects, and the country's **mushrooming middle class.**

ABACO Marketing Research in São Paulo reinforced its International Research Department by adding two multilingual researchers: **Sarah Frick and Angelica Salado.**

New membes: FGUK Research

We have grown rapidly in recent years as a company but we are still committed to setting the standard in qualitative market research recruitment, treating each project as if it were our first and last.

We have undertaken work for a wide variety of UK and International agencies and also independent clients - working on many projects on a variety of products and services. With a strong background in research, we bring expertise and understanding to your projects and will seek to add value wherever we can.

From recruitment to report writing, study management to moderation, transcription to translation, Focus Groups UK are a market research agency providing all the professional market research services you need to uncover what your customers think, what they want and how they feel.

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NOGAR Marketing Intelligence

NOGAR-Marketing Intelligence is a full service custom research provider of both qualitative and quantitative studies. We deliver clear, actionable and creative analysis, with senior level involvement on all projects.

NOGAR works with online platforms that enable effective geographic coverage and multiple profiles, with more than 700,000 internet users registered with the study.

In tune with new world trends in the market research field, **NOGAR** has invested and aligned with internet studies in Brazil.

Our expertise extends to consumer research, and B2B research, including studies with top level executives. We work in both domestic (Brazil) and Latin America. Quantitative specialties include A&Us, concept/product and copy testing, market sizing, price elasticity, tracking and customer satisfaction.

We are experienced in all quantitative methods including online, phone, mall intercept and mail. Qualitative specialties include focus group moderation, triads, and one-on-ones (phone and in-person).

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REVIEW OF THE GRIT REPORT

4th quarter of 2012

New York

Methodology

GRIT respondents are recruited by email from lists of research providers and clients contributed by GRIT cosponsors and by invitations delivered via social media channels.

For this report, the analysis is based on 1,375 completed interviews. The mix of respondents has varied over the ten years of the trends study, but within fairly narrow bands. For this edition of GRIT, we hold steady at 84% of respondents identifying themselves as Suppliers and 16% as Clients, broadly consistent with the last several waves of the study

The report can be accessed at:
http://www.greenbookblog.org/grit/

Introduction by Leonard Murphy

We know that the research professional is under **immense pressure to deliver value** and measurable business impact. We see new technologies and research models less bound by traditional precepts of best practices gaining traction. We see new models of human capital emerging that have a broad impact on the future of both suppliers and client organisations.

GRIT is the vehicle that we use to quantify these trends and share the information with the research industry so that we can all **adapt and thrive**. **GRIT** continues to track trends that it has traditionally focused on, including the **adoption of emerging technologies** and methods. **GRIT** studies the extent of the beliefs about change in that the market research industry is changing, the sentiment around that belief, and its **impact on your business**.

For the first time we will be delving specifically into how **social media analytics** is impacting the industry, with a particular focus on which technologies and providers are driving change.

Degrees of optimism

Respondents report comparable levels of revenue across the four more recent **GRITs** for both experienced and projected estimates. Looking at clients and research providers separately shows two very different pictures, however.

Fall 2012 results for suppliers show a **refreshing upward trend** in optimism, with 59% expecting an increase in the demand for their services. Client positives (based on spending intent), however, remain at 38%, exactly where they were in the Spring and down 20% from 2011. Additionally, **20% of clients expect a decrease in spending for the year.**

What seems certain is that although the industry as a whole seems to be **recovering at the same rate as the overall economy**, **GRIT** respondents are still not ready to declare that they are out of the woods just yet.

Qualitative research

Now these days when we say “qualitative research” and most people visualise the old stand-by, the **in-person focus group.** And that remains the primary qualitative research methodology, with 60% using a focus group in the past year compared to the second most-popular qualitative technique: **traditional IDIs** (In Depth Interviews), performed by 45%.

The in-person focus group remains the primary qualitative research methodology. The original alternative to focus groups, telephone focus groups, was the **least used technique**, used by 10% of respondents, compared to 25% who used chat-based online focus groups and 15% who used online focus groups with webcams.

Alternatives to focus groups that required a **longer commitment** from participants rounded out the Top seven qualitative methodologies: 22% usage of bulletin board studies and 21% usage of online communities.

In contrast to different types of focus groups, when it comes to different types of IDIs, the **preference is telephone**.

Quantitative research

Online surveys continue their domination of quantitative research, with 78% of participants in the GRIT study having engaged in online surveys in the past year.

Given continued concerns about the representativeness of online research, it’s no surprise that telephone surveys, despite their high cost, are used next most often: 44% were involved in a CATI (Computer Assisted Telephone Interviewing) project and 7% were involved in an IVR (Interactive Voice Response) project.

Face-to-face techniques come in third and fourth: 38% use face-to-face surveys, and 25% use CAPI (Computer Assisted Personal Interviewing). Breaking into the top five are mobile surveys, used by 24% of respondents.

See conclusions on the back page...

EMERGING RESEARCH PATTERNS

Conclusions of the GRIT Report - **see also page 7**

The bottom line is if you are a market researcher, and especially if you are in a senior role within a supplier organisation, you must adapt and get **ahead of the curve** or face marginalisation and eventual irrelevance.

To bring that idea full circle we believe that what we'll see evolve over the next few years is a set of **four broad insight approaches** that collectively will fuel brand relationship development:

1. Advanced analytics fuelled by 'big data' models that will tell the bulk of 'who, what, where and how' consumers think, feel and act. We include in this group many different data channels, such as CRM, POS, search, social media, mobile, geolocation, video, facial scanning, media metering, and macro-polling/ratings. Panel companies that embrace social may fit here as well, as will social listening and text analytics. Not much of this will come from the insights space, although some traditional researcher skills will be appropriate for the data synthesis and analysis aspects in the model.

2. Traditional research (quant/qual) to fill in gaps of information among specific groups or on topics that a deeper dive is necessary to help get closer to the 'why.' This may largely be delivered by companies like Google, Facebook, Twitter, and a variety of DIY applications. Companies that have proprietary data, specialised techniques, niche experience, or data currencies will also fit into this category.

3. Firms that develop methods for estimating the 'representative' nature of insights emerging from various big-data sources. Decades of scientific scrutiny have ensured that **traditional methods** – most notably the sample survey – produce findings that can be projected to larger populations. How will the same oversight be applied in these new spaces so that decisions can be made with confidence?

4. The rise of the **Insight Consultancies.** These firms will be a mix of strategy consultancies for high level enterprise planning and more specialised organisations that focus on creating business impact via insight-fuelled consumer relationships.

Ultimately these companies will answer the 'why' informed by the big data and research channels. They will be the true conduit for generating **competitive advantage for brands**, and will hold a position of influence and prestige within client organisations.

We don't own the process or the access anymore; it has been **democratised via new technology platforms** that can do much of what we do cheaper, faster, and yes, even better in many circumstances.

While that may all sound grim, the reality, in our view, is anything but. We foresee the role of research likely to **increase in importance** in this new data-driven future.

That said, the business model and value proposition is **likely very different**. On the business model front, we will likely see a meaningful **decline in traditional** quantitative research revenue over the next three-five years. The sample survey as the key driver of revenue will certainly be replaced in settings where **observational methods** can provide many of the insights that 'ask-based' survey methods have long supplied. Why ask hundreds, or even thousands, of consumers to expound on their behaviors and motivations when well-conceived analytical tools can derive the same insights from existing, readily available pools of data?

That means that the future business models of suppliers will be largely driven by emerging approaches and qualitative research combined with the **'insight consultancy' position.** That is good news for many small to mid-size suppliers but not so good news to today's larger players. It will be a sea change for us all and the shake-up is starting already.

We will continue to use the **GRIT** study as a central means of testing our hypotheses and tracking these potential shifts. If you are a market researcher, you must adapt and get ahead of the curve or face marginalisation and eventual irrelevance.

New York - home of the GreenBook

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