a.i.m.r.i.
Alliance of International Market Research Institutes

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synergie

The newsletter for our worldwide community of market researchers

CHAIRMAN'S REPORT

TONY DENT

Hi everyone,

Half way through the year already and the Insight Show has passed into history, with ESOMAR and Research & Results to come. But these three annual events are just a few of the many exhibitions, conferences, seminars and straightforward networking events that compete for our attention in today's research world. It really is an art to find time for an AIMRI meeting that doesn't clash with another event. But we have managed it with our meeting in New York on 26th June to discuss a topic of particular interest to AIMRI members – The Future of International Research with a distinguished panel of speakers as described elsewhere in this issue.

Indeed there are some features on each of the other three events mentioned above as well as one on the popular Research Club - providing regular networking evenings in major cities across the globe.

But the principal value of this issue of Synergie lies in two topical contributions from AIMRI member companies. Firstly, "A tricky election" by Adam Drummond of Opinium who, in addition to recently winning an award for their International Research, have become one of the UK's leading polling companies. As such they must be partly to blame for the fact that, once again, the reliability of research data is under scrutiny. However, Adam's article mounts a successful defence by providing a fascinating insight into some of the difficulties inherent in making predictions of the outcome of future events, simply from collecting data from representative samples. I recommend that everyone should read the full article on the AIMRI web site.

Prediction is something Leslie Townsend of Kinesis Survey studiously avoids in her comprehensive review of the potential impact of smart phones on survey methods "Will Smart phones unify Global MR Solutions?". For an old AIMRI hand like me this article is a useful reminder that things are not the same in all countries and that understanding local market conditions is vital to the conduct of good International Research. At the risk of being repetitious I also consider this article to be fascinating and it's also full of statistics – many of which I am sure are accurate!

Thanks to both for these thoughtful contributions. I hope that other members will take the hint and submit articles for us all to share through Synergie and our website. Incidentally Leslie is also speaking in New York, providing the preliminary results of our survey on Training for International Research – have you completed the survey yet? The link is: https://www.trusted-opinions.com/survey/?ID=24 – please pass it on.

Finally, an early warning - we propose to repeat the success of last year and hold the next conference in Munich immediately after Research & Results on Friday, 30th October. Stephen Bairfelt has kindly agreed to chair this event so please look out for further information soon.

See you in New York? Dublin? London? Munich? Somewhere soon, I hope.

Best wishes,

Tony.

INSIDE THIS ISSUE

CONFERENCE CALENDAR

Title	Date	Location
Annual General Meeting	June 26	New York
ESOMAR	Sept 27-30	Dublin
Research & Results	Oct 28/29	Munich
AIMRI Conference	Oct 30	Munich

ESOMAR CONGRESS

DUBLIN, IRELAND

27 - 30 SEPT 2015

See page 3...

AIMRI VILLAGE at RESEARCH & RESULTS 2015

The record number of exhibitors who took part in the 2014 event speaks for itself. With every passing year, a growing number of market research companies are choosing to participate in Research & Results, attracted by its unrivaled number of end client attendees, their significant decision-making authority, excellent visitor satisfaction levels and more. It should come as no surprise that the show is now the market research industry's most important gathering – both in Germany and on the international stage.

Market research at the highest level

Become an exhibitor at Research & Results for a one-of-a-kind opportunity to address a highly influential, motivated and satisfied audience of market research professionals and buyers face-to-face. The share of exhibitors from abroad has been steadily rising to an impressive 33% in 2014. For the first time, there were exhibitors from all five continents.

Attendees want to hear what you have to offer. Participants in a visitor survey (conducted by GESS Phone & Field; n=213) cited making new contacts as their chief motivation for attending the show, followed by gathering information on market research and reconnecting with existing contacts. 85% give the show top marks.

And these visitors are in positions of authority; virtually all of them are decision-makers. Over 50% of the prospective end-clients in attendance have a decisive say in purchasing market research services, while over 40% play an advisory role.

Whatever your target market, as an exhibitor at Research & Results you are sure to hit the mark - its unique services will attract highly promising contacts to the show. End-clients and market research service providers are by far the best-represented groups.

Celebrating our 10th anniversary this year Research & Results 2015 is taking place on 28 and 29 October, 2015 in Munich.

As in previous years we are offering AIMRI members the special opportunity to exhibit in the AIMRI Village at Research & Results 2015.

For further information please contact: http://www.research-results.com/trade-show/exhibitor-information/index.html

Please send your inquires to:
Heinrich Fischer
fischer@research-results.de or
Alexandra Frank
frank@research-results.de

The registration deadline is 17 July 2015.

Heinrich Fischer

The Future of International Research

Join us for the Inaugural AIMRI Annual Conference, New York, 26 June 2015.

TKP New York Conference Center, 109 West 39th Street, New York, NY 10018.

Keynote Speaker - Gregg Archibald

Senior Partner, Greenbook and Gen2Advisors

Gregg's presentation is a review of major trends within the research industry. We will look at how these trends are impacting brands, their insights, and their supplier relationships.

Peter Milla

Consultant, US

Peter will be discussing Data Privacy and Data Security in the Cloud: Considerations for Market Research Firms.

Lured by the promise of lower costs and more flexibility than 'traditional' computing solutions, some market research firms have moved or are considering moving to the cloud. While there are many benefits, there are corresponding risks. This session will provide industry-specific guidance. Among the topics addressed:

- The concept of cloud computing (popular service and deployment models);
- Data privacy and data security (what are the respective responsibilities of the Market Research agency and Cloud provider?);
- Compliance issues (for small, mid-sized and larger firms);
- How to execute proper due diligence (knowing what questions to ask);
- The contracts and contract provisions you need in place.

Jim Whaley

Gazelle Global, US

Jim will give us a brief look at the progression of international research opportunities and the implications of Online & Technology (Social/Local/Mobile) on the future of international research logistics.

Other Speakers include:

Bernhard Whitt, Knowledge Navigators, Germany

Mike Manning, Manning Media, US

Ralph Pagan, SIS International, US

Leslie Townsend, Kinesis Survey, US

To reserve your place at the Conference go to: www.aimri.net

INAUGURAL AIMRI ANNUAL CONFERENCE

NEW YORK 26 JUNE 2015

Downtown New York

AIMRI AT INSIGHT 2015!

INSIGHT '15
29-30 April | Olympia Central | London

Opinions LTD
Remarkable Research

The AIMRI Village at the MWL Insight Show 2015 was a huge success! Mark Kikel, Chris Sluder and Iris Blaine attended and staffed the Opinions LTD stand this year. Participation in this event is a terrific way to touch base with current clients as well as the opportunity to showcase your services to meet new and potential clients.

SIS INTERNATIONAL RESEARCH

In the AIMRI Village old and new members were enthusiastically talking, discussing past experiences, putting faces to names, getting to meet the main actors in the UK and global market, as well as making new connections with local and overseas agencies.

This year 2015 has been the year of the changes, new venue, new format new market players but always the same and friendly professional environment.

The market research industry has been going through a substantial transformation, driven by globalization of markets and penetration of research technologies and data analytics tools. For this reason Insight Show, as part of Marketing Week attracted a significant crowd of professionals, vendors, clients and brands interested in understanding and talking about the latest trends and evolutions in the industry.

Having a hybrid positioning between market research and consulting, our attention was drawn especially to the massive convergence process between market research, consulting and big data analytics, driven by the new technologies.

In developed countries a sizeable amount of commerce is now online, and smart devices are gathering a much wider set of data about consumer preferences, behaviours and perceptions. For this reason the Insight show presented a diverse crowd - with traditional market research companies, big-data-tech-focused firms, and some firms that are already trying to mix consolidated market research methodologies with opportunities offered by new technologies.

THE RESEARCH CLUB

This year the annual show was back to its old name, Insight 15, with a new date 29-30th April and a new location in Olympia. After a couple of years under the umbrella of Marketing Week Live we are a separate show again. AIMRI was well represented with a 'Village' again which proved a welcome and lively focus for many members to congregate and catch up with each other again. Exhibitors with stands were, Sample Answers, SIS International, Opinions and Random Dynamic Resource.

The networking is the heart of any good show where you can make new contacts, reinforce existing relationships in a convivial, relaxed atmosphere and the Insight15 show was no exception.

The Research Club started at 5.00pm at the end of the first day in the café area at Olympia in among the exhibition stands before moving on to the Society Bar at the nearby Hilton Olympia from 7.00 pm where almost 300 thirsty researchers networked the night away courtesy of the sponsors. The Hilton staff did us all proud and there was plenty of food and drink to sustain the hardiest research executive until late into the evening when we all disappeared into the night to prepare for the next day at the exhibition. The Research Club put on a great event thanks to their one and only Tara Mackay who was an excellent host and made everyone feel welcome. Thanks also are due to the sponsors who make it all possible.

Upcoming events for The Research Club:

London, GB - 06/08/2015 - *Special Event*
London Summer Party at The Kia Oval
Hamburg, DE - 03/09/2015 - Hamburg Networking Event
London, GB - 16/09/2015 - London MRMW Networking Reception

A TRICKY ELECTION

By Adam Drummond

Head of political polling at Opinium

Like all other polling companies we have spent the weeks since the general election analysing our data to try and determine why our final numbers failed to accurately predict the result.

Our figure for the Liberal Democrats was spot on while those for UKIP and the SNP were within one percentage point of the result although given the geographic focus of the SNP's support this error was proportionately larger in Scotland. The main areas where we made errors were understating Conservative support and overstating support for Labour and the Greens.

As a reminder of how the pollsters fared, the table below shows the final results of each member of the British Polling Council before the election.

With that in mind, this post will take you through the results of our 'exit poll' (in reality a re-contact survey of respondents who voted) and some possible explanations for what went wrong and how we can fix it.

Key lessons learnt from our review:

- There is no evidence of a late swing from our data which means the issue is who we asked and how we counted them.
- Whether because of social desirability bias, or because polls are generally answered by more politically enthusiastic people, all polls over-exaggerate likely turnout which leads to over-representation of some low-turnout groups who typically favour Labour.
- When we weight the sample of our final poll to match the demographics of the 2010 voting population – rather than the adult population as a whole - we get much closer to the actual result.
- This suggests that political polls will need to take greater account of differential turnout between demographic groups in future but this itself presents risks.
- Further issues specific to Opinium include our understating of the SNP, which most likely contributed to our overstating of Labour, as well as underrepresenting respondents aged 65+ who tend to be the most pro-Conservative.

To see the full article by Adam Drummond please go to www.aimri.net

	Method	Conservative	Labour	Lib Dem	UKIP	Green	Other	AVERAGE ERROR
GE2015 Result (GB)	-	37.80%	31.20%	8.10%	12.90%	3.80%	6.30%	-
ComRes	Telephone	35%	34%	9%	12%	4%	6%	1.52%
Opinium	Online	35%	34%	8%	12%	6%	5%	1.76%
Ipsos MORI	Telephone	36%	35%	8%	11%	5%	5%	1.76%
YouGov	Online	34%	34%	10%	12%	4%	6%	1.92%
ICM	Telephone	34%	35%	9%	11%	4%	7%	2.12%
Populus	Online	33%	33%	10%	14%	5%	6%	2.16%
Panelbase	Online	31%	33%	8%	16%	5%	7%	2.60%

ESOMAR CONGRESS 2015

This years' ESOMAR congress will take place in Dublin from 27th through the 30th September and AIMRI have reserved 'information point' booths exclusively for AIMRI members. These are available at a cost of 3,250 Euro each, inclusive of design and execution of materials (other than your own give away publicity and gifts of course!).

Booths are located in a prestige area between the coffee points and lunch area, providing a good and continuous traffic flow.

If you are interested in taking advantage of this opportunity please contact:
Tony Dent: tony@sampleanswers.com or
Catherine Harston: info@aimri.net

WILL SMARTPHONES UNIFY GLOBAL MR SOLUTIONS?

Do we share a common mobile future?

Introduction

Fielding international research has always been complicated by the discontinuity in research approaches in various regions and cultures. This often means combining methodologies across online, CATI, and in-person interviewing modes. This in turn implies longer fielding times, due to the need to work with multiple vendors and consolidate reporting, among other factors.

With the rapid global adoption of smartphones, especially in developing regions, an interesting question has emerged: Can the smartphone unify international market research?

The number of smartphone users worldwide is expected to surpass 2 billion in 2016, according to new figures from eMarketer - after nearly getting there in 2015. This year, there will be over 1.91 billion smartphone users across the globe, a figure that will increase another 12.6% to near 2.16 billion in 2016. The emergence of smartphones as the new norm is underlined by the fact that the next 1.5 billion subscribers joining the market will come from only 12 countries (primarily from developing regions in Asia-Pacific, the Middle East and Africa), compared with 34 countries for the first 1.5 billion smartphone subscribers.

Perhaps not surprisingly, the majority of growth in the market research industry over the next few years is anticipated to come from developing regions as well. Smartphones are already spearheading innovation in these areas by providing access to education, healthcare, e-commerce and governments – allowing for political transformation. It is not unreasonable then that smartphones hold the potential to create a unified approach to data collection as well, which would significantly reduce fielding costs and delivery times. To the extent that it moves data collection online, increased access to smartphones could solve these two unchanging determinants of market research feasibility.

The mobile landscape

When the research industry refers to 'mobile', it means many things. To understand whether smartphones can deliver global solutions, it is important to understand the context in which it is defined. Rapidly evolving mobile solutions are 'the new online' for our industry, providing everything from unintended consequences to 'old school' trackers - to big data solutions. All techniques are used to one degree or another, but not necessarily within all global regions.

The mobile landscape, segmented:

- Traditional online Unintentional Mobile Respondent (UMR):
  - Includes surveys, communities, and other types of projects;
  - Project may or may not be mobile-enabled, mobile-friendly, or mobile-optimized;
  - Wide agreement that there needs to be greater consideration of this respondent pool and that many firms continue to ignore the implications of not doing so.
- Intentional Mobile Respondent:
  - Includes surveys, communities, and other types of projects;
  - Whether via apps or browsers, an increasing number of projects REQUIRE a mobile device for in-the-moment research;
  - Targeted for mobile-only respondents.
- Location-based and event-based triggers:
  - Generally require / best implemented with an app.
- Passive metering / mobile-enabled passive data collection:
  - Some dedicated apps, some data collected by wearables, third-party apps, and a wide array of sources.
- Micro-polls:
  - Essential with beaconing, wearables, and favorable for other non-recruited app approaches.

Approximately half of online traffic from respondents through Kinesis' applications is generated by respondents utilizing mobile devices. In online panels, 15% to 25% of panelists are recruited via mobile devices, depending upon the region and the type of panel. This means that about 20% of panelists encounter their first touch point with their research provider via their smartphone, and from that first encounter, the likelihood that the respondent will engage via smartphones only increases.

However, those figures are largely derived from economically developed regions in which traditional online research preceded the use of mobile devices by research respondents. We could potentially experience even higher percentages, respectively, for regions that have essentially skipped the desktop experience.

In regions where research has been more likely to occur face-to-face or via CATI (such as in Latin America), the cost and time savings associated with the adoption of mobile research are very pronounced. As use of mobile devices greatly outpaces that of desktop devices globally, the trend is especially apparent in regions such as Asia and Africa where data collection was highly fragmented in the past.

In addition, there are predictions within the industry that within two to three years, 75% of surveys will be mobile, and by necessity, shorter and simpler. A rapid global migration to mobile surveys could make

Limiting factors for the global adoption of a standard

1. Connectivity

Undoubtedly the greatest limiting factor for global adoption of common research methodologies is the underlying acceptance rate of technologies themselves. Not only the adoption of smartphones, but the availability and speed of network connectivity are also of critical importance.

According to a study by We Are Social, internet connection speeds can vary significantly around the world from an average of more than 25 Mbps in South Korea, to barely 2 Mbps in India.

Moreover, while faster mobile internet access is growing, it is not growing equally across regions. The ability to get online quickly from a desktop or mobile device certainly has an impact on the ability to gather data.

2. Adoption and use of apps

The adoption of apps, the utilization of messaging services and how different audiences prefer to communicate are also factors in the equation. However, cultural differences, especially as they pertain to the adoption of technologies, play an almost equally important role.

For instance, the potential for data acquisition via beacons offers an exciting new data collection mode for regions such as North America and Europe, but may be premature for other regions, especially with the uncertainty in data privacy regulations. So, while retail beaconing may be the next area of major experimentation in market research, it may be less interesting on a global scale.

Mobile research adoption is complicated by the need for multiple approaches: one, a browser-based approach and the other an apps-based approach. The browser-based approach is more rapid and less expensive to deploy, but cannot readily support some functions that are easily supported within an app (i.e. geo-location, beaconing services, bar code scanning, passive metering etc…).

Also, types of apps, app usage and operating system preference (which determines app store and consequently app availability), are inconsistent across regions and constrain the possibility of a standard global adoption.

3. Culture and customization

Cultural differences within generations and across regions, mean that approaches to inviting respondents are always evolving and may never coalesce to a single approach. Mobile respondents are increasingly being given greater control over the communications they wish to receive – both through apps and through operating systems – as part of the movement towards providing a more customizable experience.

Precise indoor location sensing, combined with mobile apps (not market research apps), are enabling a new generation of extremely personalized services and information that is tailored to the what, when, and where people wish to see it. Since mobile devices are already the preferred mode of receiving communications of all types, this has broad implications for how we communicate with respondents when we are requesting information, but it does not necessarily mean that we will all opt-in to the same approaches.

Likewise, there are significant differences in the approaches to social media within various regions. Extent of networking, depth of communications (lightweight such as Twitter, versus more in-depth sharing via apps like Facebook), desire for privacy, and changes to the popularity of social media apps themselves are just a few of the factors that indicate that communications practices will continue to vary from region to region due to cultural differences. For example, the saturation level of active social network accounts (i.e. active accounts on the top social network in each country compared to population), can fluctuate greatly based on the region – from 66% in Singapore to 7% in Nigeria. In addition, research conducted by GlobalWebIndex found that the average number of hours a person spends engaged on social media can vary greatly by region too. The difference is as vast as 4.3 hours a day in Argentina to less than an hour a day in Japan.

4. Rapidly evolving business models

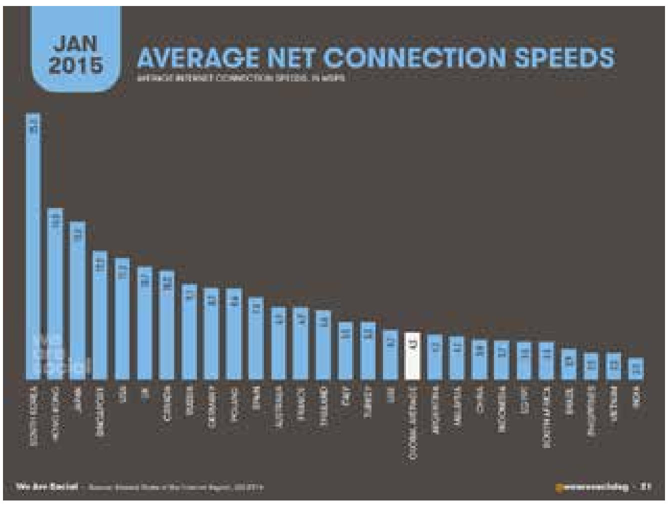
The business models for data collection are also changing, and regions will differ in what is allowed from a privacy and data security standpoint. Regardless of region, the collection of data will be increasingly meshed with the overall business of the technology landscape and eventually the Internet of Things landscape.

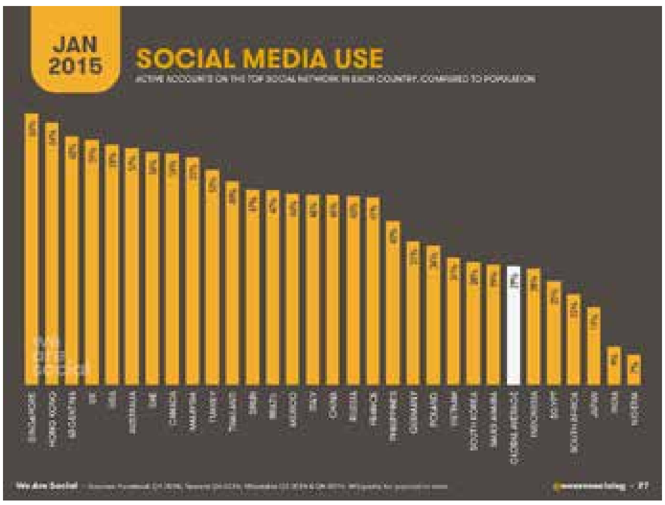
Content and technology vendors will increasingly have the advantage in data collection. Regardless of region, respondents may pay for devices and personal data will become part of an intrinsic reward mechanism. For instance, in exchange for sharing data, you understand how many calories you have consumed. It is the communities themselves – using that term in a broader sense than it might typically be used in our industry – that will become important in compensating research participants – whether active or passive – whether they know they are research participants or not, or when data is just a byproduct of other things -- in new forms.

Summary

Considering the differences in the adoption of technologies, the preference for apps, differences in social media consumption and an evolving business model - a common global research approach remains elusive. However, mobile technology may still have significant impacts on fielding times, with adoption promising that many regions will have a wider array of acceptable online solutions for more rapid analytics.

Leslie Townsend, Kinesis





SAMPLE ANSWERS GOES WANDERING:

Ton Paans and Mark Dent report on three international events.

The Netherlands – 4th to 5th February

The MIE (Marketing Information Event) is a joint effort between MOA (the Dutch Marketing Research Association) and NIMA (the Dutch Institute of Marketing). Originally a traditional MR trade fair with papers, the show has gradually developed into an event that has found its identity as a very contemporary 'Insights show' with a noticeably younger attendance than most of its equivalents abroad.

This year's edition, held in Utrecht, was extremely well attended with 2800 delegates (30% up on the previous year) and a jam-packed programme of papers, presentations and workshops. With old school MR very much on the fringes, this is all about the latest online developments and marketing trends with social media the focus of attention.

France – 16th to 17th April

This year the relatively new annual exhibition 'Printemps des Etudes' was, guess what, very French! But it has now established itself as 'the' French show and attendance is slowly becoming more international (not dissimilar to what has gradually happened in Munich with Research & Results - although they're a fair way off yet. However, the lay-out and feel inside the otherwise wonderful location remains oddly cramped and small-scale, which gives the show a claustrophobic quality.

AIMRI is planning an AIMRI Village at next years Printemps, please contact Catherine Harston if you are interested in a space.

Brazil - 26th April to 28th April

Esomar Latin America convened at the Hilton Morubi close to the Octavio Frias Oliveria Bridge over the Rio Pinheiros, Sao Paulo - a very suitable venue with good spaces for both presentations and exhibit booths: catering was equally good.

Nevertheless it was a relatively small event with 55 speakers providing 28 presentations, three Keynote speakers, six sponsors and 13 exhibitors. All enjoyed by just 230 delegates from 20 countries supported by seven ESOMAR staff to ensure everything ran smoothly.

Sunday 26th was a day of preparation for the exhibitors and registering for the show followed by reception drinks in the evening in the main exhibition hall.

Proceedings started at 9am on the Monday with presentations under the subject of World Festival, Latin Parade and Glocal Business Fair – Part 1 provided plenty of discussion points for a well deserved lunch. The afternoon continued with Glocal Business Fair – Part 2. The late afternoon session included the guest speaker Philipe Campello, Subsecretary of Tourism for Rio de Janeiro, who focussed on the pending Olympics, thus continuing the theme of sport. In the evening the networking dinner, sponsored NetQuest, was complete with Samba dancing. All in all it was a long, interesting day.

A few tired faces were visible the following morning whilst innovation was the name of the game with various sessions under the name 'Latinovation', firstly two sessions on Latinovation:Digital Fiesta. Then, after presentations under the tag Latinovation: From Digital to Mobile to Multiscreen. The final session looked at cross disciplines with key note speaker Senta Slingerland, the Director of Brand Strategy at Lions Festivals; followed by the farewell fiesta drinks in the exhibition area.

NEW MEMBER

MARKET PULSE

Market Pulse is a full service market, media and social research agency formed in 2006 by two directors with over 25 years combined experience, both on the agency and client side. Based in Nairobi – Kenya, the company operates throughout the Sub-Sahara region specifically in Kenya, Uganda, Tanzania, Rwanda, Burundi, Ethiopia, South Sudan, Sudan, DRC Congo, Nigeria, Cameroun and Ghana etc. With experience in both qualitative and quantitative research, the company has over the years gained experience in various sectors including telco, FMCG, government, media, pharmaceuticals, white goods, energy, banking, mobile handsets and executive interviews.

We are able to handle qualitative projects (FGD/In-depths) from recruitment, moderation, transcription and reporting. In quantitative studies, we utilise PAPI or CATI data collection methods for the markets that we operate in. Our facilities are able to handle multiple country projects efficiently and on time. For any projects in Sub-Sahara Africa contact Market Pulse.

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