

Relentless progress of online solutions

Greetings. Last June in Krakow I was elected as Chairman and I would like to thank all those who supported me and I hope I will be able to live up to the example set by my predecessor Gerry Stacey. Gerry has been Chairman for the past 4 years and has done an excellent job guiding AIMRI with a steady hand. We had a delightful time in Krakow together visiting the famous salt mines. I am pleased he will remain on the committee assisting with policy and the AIMRI website.

New members

This year we welcome new members and returning members from all corners of the Research World. I hope they will find membership of our organisation beneficial and look forward to hearing from them with any ideas they may have for how AIMRI can help them

ADVISE Ad & Media Expert advisors have joined from Argentina, OMI from Russia, Confield from Germany, Call Marketing from France, Impetus Research from India, Market Side from Poland, Itracks from the USA, and Blauw Research, Opinion Matters, fhios, Blog Research and Research@Cathrene.com. all from the UK

The industry trend remains relentlessly moving towards on-line solutions largely driven by the cost advantage over traditional methodologies which is irresistible to clients. I recall one of the liveliest debates I ever saw at an AIMRI conference was in Wiesbaden on this very topic which attracted more than 50 delegates! There are an increasing number of B2B panels for on-line solutions available and it would be interesting to hear of members experiences. Perhaps a future conference topic. Meanwhile industry

Forging business relationships

consolidation continues with GfK and the WPP group courting TNS and all showing growth in the faster growing markets of Asia Pacific, Latin America, Middle East and Africa and Central and Eastern Europe. All areas where AIMRI has members.

Our next Conference will be held in Montreal at the same time as the annual ESOMAR Congress which is the first first time in North America for both Organisations and shows the ever increasing global reach of our industry. The topic for this conference is “**Completing difficult research assignments**” something close to all our hearts with clients who are getting more and more demanding. I hope members will be able to attend and foster closer working and social relationships.

AIMRI tries to assist members with forging business relationships. I know many members are already working successfully together on international projects and I hope this will increase and AIMRI will be happy to assist as far as it can.

Marketing initiative

We have also launched a new marketing initiative this year with our sponsorship of the Research Club. This is an informal group which started in London 4 years ago and I was pleased to see many AIMRI members present. It has expanded to Amsterdam and in September is holding an event in Hamburg. Many members attend and we hope to gain new members from these events and I would like to hear members' views on whether we should continue this sponsorship.

We have an interesting programme planned for next year with conferences in Athens in the spring and Edinburgh in

the summer where I hope you to see as many members as possible.

Finally I would like to welcome our new Hon Treasurer Stephen Hughes from CfMC and express my thanks to Richard who as ever provides marvellous administration services and help to me and to the committee.



John Mackay,
Chairman

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Athens - see pg 2

A vital factor for all researchers

The early spring AIMRI meeting will be in Athens on Friday 6 March 2009. The subject will be:

“Respondent co-operation and the choice of research method”.

Whatever research method is chosen (whether online, blog analysis, qualitative, telephone, face-to-face or by mail) the question of respondent co-operation is a vital factor. For each research method how should we realise the hope of increased co-operation.

Athens

The conference will be in the 5 star **St George Lycabettus Hotel** – a well known “boutique” establishment on the slopes of the Lycabettus hill but accessible to Kolonaki Square and the shops. The hotel enjoys fabulous views over the Acropolis.



Sophisticated Athens sites include many pillars of Western history, from the Acropolis to the Temple of Olympian Zeus, as well as treasures in the National Archaeological Museum, the Benaki Museum and the ambience of the Plaka.

Athens is a city reformed thanks to fortunes brought by the 2004 Summer Olympics. Spotless parks and streets, ultra-modern metro, new motorways, and an accessible airport (with flights to all parts of the world) now greet the visitor. The average maximum daily temperature in March is a pleasant 22 degrees centigrade.

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

Meeting in Canada by popular demand

A survey by **at random international** established that many **AIMRI** members would welcome a meeting in Montréal in the week prior to ESOMAR ie on Friday 19 September 2008. The subject will be:

“Completing difficult research assignments”

Included in this subject will be topics such as ***Contacting hard to reach respondent groups, Dealing with multiple languages, Handling cultural diversity in different markets etc.***

Montréal

The conference will be in the very comfortable **Hôtel Maritime** May 1642. A group of French settlers, founded Montréal on the banks of the St. Lawrence River, on a tip of land that is now part of Old Montréal. The site would become a fortified town in the 18th century, under French control up until 1760, and then British.

The heart of the metropolis was built in the early 20th century, symbolised by the head offices of banks on St. James Street. The historic city centre is still thriving thanks to restoration designed to preserve the city’s heritage.



This will be another impressive event in a stimulating environment.

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

A Rolling Annual Plan

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

Dates and venues:

Date	Hotel	Venue	Airport
Fri 19 Sept 2008	Hôtel Maritime	Montréal	Montréal
Fri 6 March 2009	St George Lycabettus	Athens	Athens
Fri 12 June 2009	tbc	Edinburgh	Edinburgh

Subjects:

For September 2008 the subject is:

“Completing difficult research assignments”

For March 2009 the subject is:

“Respondent co-operation & choice of research method”

2008 Insight Show

The 2008 Insight Show will be on **18 - 19 November** and **AIMRI** will again host the International Village. A limited number of places are still available.

Those wishing to take part should contact Vanessa Norris - The Event Sales Director on Tel +44 20 7970 6444 or email vanessa.norris@centaur.co.uk

When wider sources are needed

In March 2003, we presented a paper at the **AIMRI** meeting in Bacoli, entitled '**Exploiting new information sources**'. At the time we argued that the research industry was facing unprecedented pressure to deliver faster, cheaper and more insightful findings.

We also argued that two types of research provider were emerging – the high volume, low cost data cruncher and the added value research consultants. The added value consultants faced their own challenges, one of these being that it was becoming increasingly unrealistic to expect single source data (ie a qualitative or quantitative research project) to be enough to provide effective solutions to complex business problems.

New skill sets were required. This included the ability to make better use of internal client data to support and enhance research findings. It also included the ability to shift from the traditional research perspective of looking at the past and the present to developing a more future orientation. And it required the skills to be able to draw on a number of different disciplines to provide greater understanding of consumer behaviour.

Five years on, we have been asked to bring our original paper up to date. Were we right with our original predictions? What new technologies are available? What are the new challenges for the research industry?

Firstly, we are firmly of the view that we were right in our prediction about the emerging nature of the two types of research provider. What we probably underestimated was the impact of technology on this development and the type of organisation which was going to take the lead on the data side.

The nature and pace of **online development** also took us by surprise. In 2003 online research was starting to making its mark. Nowadays it is as acceptable as any other form of research methodology. The new paradigm is Web 2.0 incorporating blogs, wikis, social networking, multimedia sharing, online communities, co-creation and podcasting.

Then there is the shift of power to the consumer. No longer a passive information seeker, consumers are now active participants on the web, creating and publishing content at will. This presents new challenges for market research professionals in a more complex and dynamic research universe.

Web 2.0 not only incorporates a wide range of new and interesting developments, it also provides researchers with further sources of customer and consumer information. But to exploit these sources is neither simple nor straightforward – finding the golden nuggets of insight from vast amounts of data and information has always been a key challenge for researchers. Finding insight from these new sources is even more of a challenge and has to be tackled in a different way.



Naples near Bacoli,
where this topic was discussed

Further challenges

The emergence of Web 2.0 presents the research industry with further challenges. Not only does it have to get to grips with the new technologies and adapt to the culture of Web 2.0 it has to find cost effective ways of operating in a world of no rules communication and templateless dialogue with the jungle of words, opinions, debates and emotions being expressed online.

Some of the more specialist market research providers picked up on Web 2.0 in late 2005 and we soon saw a range of initiatives and the adoption of the term Research 2.0, a term which embraces techniques such as blog-mining, respondent blogs, research forums and various innovative uses of mobile phones.

New companies have emerged which seem to have the technological ability to exploit Web 2.0 capabilities and clients are generally not afraid to use them. Traditional research companies, including the new breed of technologically savvy researchers seem in general to have been relatively slow to embrace these new information sources, either because they are difficult and expensive to reach or because they don't have the right skills and capabilities.

To hear more about these new challenges for the research industry and to appreciate the wide variety of information sources which researchers must now embrace, Stephen will be presenting his paper at the **AIMRI meeting in Montréal on Friday 19 September.2009.**



Stephen Bairfelt,
Purple Market Research
Hounslow, UK

Research in Central & Eastern Europe

The summer AIMRI meeting took place in the beautiful Polish city of Krakow on Friday 20 June 2008, on the subject of “**Research in Central & Eastern Europe (CEE)**”. The somewhat disappointing turnout of members from Western Europe was compensated by the excellent attendance of market researchers from Poland and other CEE countries, for most of whom it was their first – but hopefully not last – AIMRI conference.

Held in the heart of the Old Town just a stone’s throw from Krakow’s famous Cloth Hall, the conference was housed in the elegant and luxurious Grand Hotel, described as the best 5-star hotel in the city, over a century old and lovingly restored.



Session 1, “Understanding Central & Eastern Europe” was kicked-off by **Ruth Stanat**, founder and president of SIS International Research, New York, with a paper on “**CEE as a market opportunity for international clients**”. Emphasising the dangers of a one-size-fits-all approach, she presented the results of detailed in-house research into the various CEE markets, pointing to potential business opportunities on a country-by-country and sector-by-sector basis. She concluded that B2B is the largest current growth area for market research in the region due to the lack of reliable business data and the need for international clients to understand the market landscape.

“**CEE markets are not created equal**”, by **Agnieszka Gornicka**, of Inquiry sp, Warsaw, provided an entertaining and enlightening look at the cultural factors driving differences in consumer behaviour in the region. Taking the powerful Hofstede Model of cultural dimensions as her frame of reference, Agnieszka described some of the differences in consumer attitudes, illustrating her talk with video clips of commercial TV spots from various CEE markets. She concluded by emphasising the importance of understanding consumer mind-sets when approaching the region.



Ostrogski Castle, Warsaw

Sessions 2 and 3 covered the changing background of market research in CEE and the development of online research in the region. **Jens Krämer**, of *at random international, Hamburg*, answered his own question: “**Poland and Germany, where is market research more acceptable?**” by reference to a specially-conducted CATI survey on attitudes to market research in the two markets.

The survey covered for example. perceptions of whether there is “too much” research, willingness to participate in surveys, and expected incentives. A surprising discovery was the lack of differences between the two markets, despite their very different backgrounds.

David Wieseltier, from Cint AB in Stockholm, spoke on “**online research in Russia and throughout CEE**”. Despite his conviction that “the future of research is online”, David pointed out that Russia still has very low internet penetration and online panels are not yet really representative except for younger age-groups.

Nevertheless, telephone surveys also face problems such as declining response rates, and David sees a big future for online research in CEE, for which his agency is preparing by acting as a point of access to a range of local online panels.

AIMRI meets in Krakow

Speaking on “**the qualitative dimension in online research**”, **John Storey**, director of Blog Research, UK, conveyed his “passion for qualitative research” as well as his conviction that “the future for qualitative research is online”. He described how his agency has extended its reach by setting up blogs – including in CEE markets – enabling respondents to participate in research in their own language and at times convenient to them.

Session 4 after lunch dealt with the Polish scene. We were privileged to hear **Professor Jan Jerschina**, of CEM Market and Public Opinion Research Institute, Krakow, one of Poland’s most distinguished market researchers, speak on the development of the industry in Poland and the phases of economic transformation and modernisation in “the critical years: 1990 – 2000”. He drew attention to current challenges facing the industry due to the development of online and mobile technologies, and problems of falling response rates. He suggested that greater emphasis may need to be placed on qualitative approaches in future rather than relying on quantitative interviewing.

In the day’s final paper, **Maciej Bartminski** of Market Side, Warsaw, introduced delegates to “**The retail market in Poland**”. Since the fall of communism this has passed through phases of explosive growth, entry of foreign

operators, and a current phase of concentration & expansion. Yet surprisingly, over 90% of Polish retail outlets are still small stores of below 100 m2. Despite consolidation there is still room for new players, Maciej concluded.



Grand Hotel, Krakow

After the conference papers, **AIMRI’s** Annual General Meeting was held at which the Council for the coming year was elected as well as a new Chairman, **John Mackay** of Sample Answers, in place of retiring Chairman Gerry Stacey. The AGM was followed by an Open Council meeting.

In now traditional fashion, the conference was rounded off on Friday evening by a Gala Dinner for members and their guests in the excellent **Cyrano de Bergerac restaurant** – voted sixth best in Poland and the best in Krakow. Many delegates were able to stay for the weekend to enjoy the sights and tastes of this fascinating and historic city – and to hope that this will not be the last **AIMRI** event to be held in the emerging markets of Eastern Europe.



John Attfield,
Attfield Dykstra & Partners,
Hamburg

A new member was speaking:

Blog Research (part of Category Consulting)

Category Consulting is a Retail & Shopper focused research company, most research being conducted for Supermarkets offering in-store Focus Groups & In-store Observation & Surveys. Category Consulting also has its own Viewing Facility (AllinOneView) and Respondent Recruitment Service for researchers. **Blog Research** is our Internet Focused service, offering Research Blogs, Bulletin Boards & On-line real-time Focus Groups & Video Chat along with Internet Surveys on an International basis.

This is the most low cost and efficient way to collect opinions. We get to new social & cultural networks & hard to find respondent groups.

See also back page “**Qualitative dimension in online research**”.

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New members

Confield Research

The present Confield Research is one of the successors to the previous company of the same name who were formerly members of **AIMRI**. The present organisation (refounded in 2007) has been assisting clients to achieve their research objectives across Europe and worldwide - mainly in fieldwork.

In Germany we are skilled in both Qualitative and Quantitative research, Our services include: Product testing (speciality), In-home interviews, Advertising testing, CAPI, CATI, CAWI, Customer satisfaction, Focus groups, Hall tests and In-depth interviews.

Internationally, Confield works through a network of partner companies. Confield Research is also a member of ESOMAR, Global Market Research, and BVM.

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fhios

fhios is a leading international research company, that provides customer experience research and design services to provide its clients with the insight to understand customers needs, goals, habits and satisfaction levels when they engage with them and their competitors. **fhios** has evolved a number of different strategies and research services to measure, validate, benchmark, compare and explore the customer experience to ensure that its clients have the best insight into their customer needs and behaviours across any touch point.

fhios provides a number of point-in-time research services covering areas such as usability, eye tracking, concept testing, brand perception and competitive benchmarking to help answer key business issues. Our services provide our clients with the insight to understand customers needs, goals, habits and satisfaction levels when they engage with them and their competitors.

In addition to evolving current offerings, Companies are constantly introducing new brands, concepts, and products to remain competitive. Companies need to place the customer at the heart of their business strategy and take the time to measure, analyse, and understand the goals, needs and aspirations of their customers to provide the kind of stellar experience that they now expect.

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Market Side

Market Side is an independent marketing research company based in Poland. We offer both quantitative and qualitative research. In 2007 we completed 55,000 interviews in over 30 projects of different types, from just two focus groups to samples of a couple of thousand respondents in single quantitative projects.

We have our own CATI studio as well as the access to viewing facilities in all major towns across Poland. We work with over 500 interviewers across the country.

We are the reliable data provider for a number of foreign partners – from Czech Republic, Germany and US.

We combine extensive experience with an excellent academic background. Maciej is a sociologist and economist by education, he also graduated in the Principles of Marketing Research at Georgia University. He has been in the research business since the early 90's. Gosia, our qualitative expert, has got nearly 15 years experience in research. She designed, completed and reported hundreds of qualitative projects in many categories.

If you consider any project in Poland we will be your best choice!

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Opinion Matters

Opinion Matters is in the business of understanding people, from the boardroom to the school playground, and importantly we understand the wants and needs of our clients.

Much of **Opinion Matters'** success was founded upon speed and efficiency and is one of the main reasons why clients keep returning to us. We consistently deliver fast, accurate results allowing us to continue competing (and beating) 'traditional' research agencies on speed and quality.

Creativity is at the core of everything we do - we find that our clients are inevitably engaged throughout the entire research process and are highly motivated by the ideas generated. The momentum of our projects ultimately leave our clients with a real sense that they are moving in the right direction - often leading to a 'call to action' for themselves and their company

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Why Do People Participate in Surveys?



Many people, including professional marketing researchers, simply do not understand what motivates individuals the world over to participate in surveys. And in the case of online surveys, to spend 10 to 15 minutes of their valuable time completing a questionnaire about shampoo, travel, insurance or some other subject likely to be of minimal personal interest, is hard to conceive.

A recent study conducted by Survey Sampling International (SSI) designed to analyze the motivating psychological factors behind survey participation examines a new psychological premise called **self-determination theory or SDT**.

As an industry, we need to continue to learn more about why people take part in research and why they do not. While we pride ourselves on being able to formulate questions and research studies to describe and explain the manner of specific consumer activities and behaviors, we obviously cannot force someone to answer a survey who has no desire to participate.

SDT offers a broader approach than the behavioral axioms that have ruled marketing research for decades, such as behaviorism, cognitive dissonance, and free choice paradigm.

SDT assumes that people are active organisms with innate tendencies toward psychological growth and development who strive to master ongoing challenges and integrate their experiences into a coherent sense of self. In this way, SDT distinguishes between intrinsic motivation — doing something because it is inherently interesting or enjoyable, and extrinsic motivation — doing something to satisfy an external demand. Tasks completed as a result of intrinsic motivation are characterized by high quality, creativity, and enjoyment on the part of the respondent.

Seeking Personal Fulfilment

According to Cape, under the SDT model, people elect to serve as respondents — particularly in online sampling — because the experience is personally fulfilling.

Of particular significance is the finding that rewards, such as cash or cash proxies, points to be redeemed for cash or gifts, can actually undermine intrinsic motivation because rewards undermine the feeling of autonomy associated with this type of behavior.

A study undertaken during the latter half of 2007 by SSI to test this part of the SDT model proved it to be true. To conduct the survey, SSI completed 1,423 online interviews in the UK across all age ranges and both genders.

Improving the interview experience

For this reason, SDT holds interesting implications regarding how research should be positioned — before and after the interview. The industry-wide decline of survey response rates can be slowed by a dedicated effort on the part of respondent providers, such as SSI, to improve each participant's interview experience.

Such improvement relies in large measure on the respondent provider's ability to use survey language that appeals to the person's goodwill, sense of social responsibility and courtesy, and self-esteem. This should be accompanied by careful and effective survey approaches and questionnaire design to increase panelist satisfaction. Ensuring each interview fosters a positive emotional response will encourage the respondent to continue to take part in research activities.

However, the SDT model also shows researchers must be prepared to go beyond the traditional "thank you" and conventional closing phrases currently used, and provide actual feedback on the individual's survey performance — if they expect him/her to agree to participate in future communities.

To download a copy of the full research paper, "Understanding Respondent Motivation," go to http://www.surveysampling.com/quality_white.php.



Pete Cape
(global knowledge director)
Survey Sampling International (SSI)

Web 2.0 - the qualitative dimension in online research

John Storey spoke at the AIMRI conference in Krakow (see page 4) and this has already resulted in a successful collaboration with another AIMRI member. We asked John to share some of his ideas with a wider audience:

Web 2.0 research is the latest industry buzz word, but the reality is many are talking it up to promote their businesses, but few are actually doing the real thing! . Web 2.0 Research for me is a step change in research where user (respondent) generated content is used to generate new insights and ideas. This has the effect of making a respondent a 'participant' (contributor & creator of research content and subjects). In many ways Web 2.0 is **a return to the original internet crusade** for freedom of expression.

So how does this all relate to Blog Research you might ask?....

The latest trend in our industry is to develop and use internet communities for research. The great thing about a blog is that communities can live in a blog space and interact and socially network better than in some of the more traditional internet spaces used for research such as forums or bulletin boards.

Eureka moment

What actually happened was I became frustrated by paper diaries as I used them a lot for pre-focus group product trial and shopping experiences. I'd also tried audio diaries, but again they were cumbersome and needed transcribing and sorting into a consistent format for research analysis. Being a bit of an IT geek and self confessed hacker I thought I'd try using my blog.



To my surprise, this worked a treat! There was no retyping, the responses were immediate and time & date stamped, consumers were already familiar with this format, thanks to MySpace & Facebook and you could post new questions & probe particular responses during the period.

But the real Eureka moment came when I started to realise I was getting new and better insights, opposed to the regular focus group which often just delivers the same old thing or verification of the expected.

This led me to wonder, **why was this happening?** Well respondents, for a start would tend to rant and rave more on a blog and express their frustrations. They feel anonymous and freer to express their honest & true opinions. This is very unlike a focus group, where they're responding to the group, the moderator, and the secret people behind the glass. Just look at many social networking sites and you'll be amazed how much participants have become used to sharing their most intimate details.

What's most interesting is when they're expressing their frustrations and problems, and other participants start consoling one another, and share their solutions and ideas. You often get the statement **"why can't they do.....?"** This has led to many new ideas and innovations and in my view beats the 'brainjuicer' type techniques hands down.

We will continue this article in the next edition of Synergie.

See company details on page 5

John Storey
Blog Research
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