

Research to the forefront

Dear All,

Troubled times bring new opportunities! The chill winds of recession are blowing through our industry and the effects will be far reaching and sometimes quite close to home! We have seen large companies like Harris shedding staff and re-grouping. There will be more to come no doubt as TNS and the WPP group consummate their marriage. Several large call centres have closed in the past few months in the wake of consolidation and the increase of "offshoring".

In contrast we see the relentless increase in online research. It is a cheaper alternative to more traditional methodologies and appealing to clients who are also under pressure to cut costs. This is not across the board and there is plenty of qualitative and face-to-face work going on with more studios opening for focus groups. Again it is a cost effective option for clients who need to be seen doing some research. Even long established trackers are consolidating and we are seeing rival brands working together and sharing data.

More new members

AIMRI has not escaped these times with more resignations than we have seen for many years. Happily we have new members joining. Since my last piece in Synergie we have welcomed nine new members from as far afield as Afghanistan, Bulgaria, Malaysia, The Netherlands, UK and two new members from both

Russia and the USA. **Please let us make them feel welcome and included.** Send them an email and make contact, it will be difficult for some of them who are on the other side of the globe to attend our European meetings.

So much for doom and gloom, let us not dwell. In times like this research should be at the forefront steering clients out of the doldrums with new ideas gleaned from studies but sadly they tend to batten down the hatches and budgets are cut. What can we do about it? It is a good question; technology offers one answer with online solutions becoming more sophisticated and effective. There will be new ways to tackle research issues that we are unaware of at present and we need to recognise them when we see them.

Improving the website

We are making efforts to modernise the website to make it much more of a focus for our group. You will see an improvement in the appearance and functionality to be followed by an interactive feature where members can communicate more easily through a forum.

Until we meet again let me wish you all the best for the rest of the year.



John Mackay
Chairman

Making new AIMRI contacts

Next AIMRI meeting

The summer **AIMRI** meeting will be in Edinburgh on Friday, 12 June 2009. The subject will be:

"New trends in qualitative research"

Edinburgh has one of the most beautiful cityscapes in the world, making it the ideal city break destination. With Scotland's most famous castle dominating the city skyline, there is plenty to see and do including world-class museums and galleries.

The conference will be in the comfortable four star **Royal Terrace Hotel**. Facilities are excellent and include a swimming pool and gym.



Edinburgh
see page 2

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Focus on innovation

The summer **AIMRI** meeting will be in Edinburgh on Friday, 12 June 2009. The subject will be:

“New trends in qualitative research”

We expect to cover on-line focus groups, ways of exploiting web 2.0, using blogs as a research tool and examine cases where qualitative research has provided new insight.

Edinburgh

The conference will be in the comfortable four star **Royal Terrace Hotel**. Recently modernised it enjoys excellent views over landscaped gardens to the rear while the front is part of the well known Georgian terrace. Facilities are excellent and include a swimming pool and gym. The hotel is centrally placed for shopping, and visits to the castle and museums.



Royal Terrace Hotel

Edinburgh has one of the most beautiful cityscapes in the world, making it the ideal city break destination. With Scotland's most famous castle dominating the city skyline, there is plenty to see and do including world-class museums and galleries.

The high volcanic rock with precipitous sides upon which the castle is built has been a stronghold for thousands of years. It is because of the defensive value of the rock and the succeeding castles built there that **Edinburgh** became important and eventually the capital of Scotland.

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

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: Which research methods work best?”

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 five 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.

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).

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 6 March 2009	St George Lycabettus	Athens	Athens
Fri 12 June 2009	Royal Crescent	Edinburgh	Edinburgh

Subjects:

For March 2009 the subject is:

“Respondent co-operation: Which research method work best?”

For June 2009 the subject is:

“New trends in qualitative research”

2009 Insight Show

The 2009 Insight Show will be on

30 June - 1 July

and **AIMRI** will again host the International Village.- This time at Olympia, London. A limited number of places are still available.

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

AIMRI meeting in Montreal

In the light of this year's annual ESOMAR congress in Montreal, Canada it was suggested by some **AIMRI** members that a one day meeting in the previous week could be convenient for many members. A telephone survey conducted by **at random international** established that a significant number of members would be attending ESOMAR and most would also be interested in an AIMRI meeting in advance.

Thus, on Friday September 19th 2008 **AIMRI** hosted its first member conference outside of Europe on the topic of **"completing difficult research assignments"**. The conference was very well attended and proves that the world is globalising at an astonishing pace. International markets are becoming ever more important, even for predominantly European focussed research agencies.

This one-day conference allowed us to attend highly interesting and unique papers on the perils and dangers of international research with a specific focus on research in difficult markets and hard to reach target groups. Abstracts of all papers presented in Montreal can be obtained from the authors directly or by contacting the **AIMRI** offices (info@aimri.net).

The morning sessions were started off by **Stephen Bairfelt** of **Purple Market Research, UK** speaking about **"when wider sources are needed"** and the importance of alternative data sources such as Web 2.0, internally available data and observations play in today's insight generation. Stephen pointed out that in order to provide added value services and to stay at the forefront of customer knowledge many market research agencies need to learn new skills and look at new or untapped sources of information.

The second morning paper was presented to us by **John Mackay** of **Sample Answers, UK**, focussing on the difficulties associated with **"finding the perfect B2B sample"** and what to look out for. Sampling difficult target groups can be harder than finding the holy grail and there are many things along the way a thoughtful research manager needs to heed. In essence, John concludes we need to understand the target audience fully and provide clear and complete specifications. We need to obtain realistic sample counts, verify all details and ideally conduct pilot surveys with subsamples to gauge feasibility. And when we have checked everything and contemplated all eventualities, we need to double check!

We then heard a paper by **Alan Grabowsky** of **ABACO Marketing Research, Brazil**, on possibilities and limitations of **"conducting market research in Brazil"**. Whilst learning interesting and amusing facts such as Brazil being the worlds number one exporter of soccer players, top models and chickens we also saw an impressive presentation on the need for localised research services and the importance of local market expertise. Rigid project specifications or methodological limitations can often lead to poor research results when conducting research in Latin America. Alan concluded it is vital for research to be "tropicalised" if it

is to be successful, productive and insightful and that a plan B or even C is advisable...

Neil Sandin for **SIS International Research, USA**, presented an insightful and very informative paper on the possibilities and dangers of **"research in Africa & other developing countries"**. Neil's paper presented the obvious cultural, technological and infrastructural barriers facing market research in emerging markets, but he also went on to point out some of the less obvious issues and gave actionable advice on how to conquer these. The bottom line being, when conducting research in Africa you need to key in to the local culture and be flexible in order to get the job done.



Montreal

After a delicious lunch in the conference facility of the Maritime Hotel, Montreal we went on to be the audience for an interesting paper about **"researching attitudes and media behaviour in Muslim societies"** presented by **Dr. Haleh Vaziri**, of **InterMedia, USA**. Haleh explained the importance and effect of tragedy, trepidation, taboos and Taarof on

conducting research in Muslim societies. Haleh goes on to point out that there might not be a perfectly scientific way of conducting research in restrictive or post-war societies, but it's better than doing none at all and if we listen closely and embrace the unexpected, we are able to give a voice to the voiceless.

Finally, to close the conference, **Pieter Paul Verheggen** of **Motivaction International, Netherlands**, spoke about **"reaching Muslims in the Netherlands"**. With the Netherlands being the most multi cultural society in the Western world, it seems self explanatory that a Dutch market research agency places importance on listening to ethnic minorities, urban youngsters and first generation immigrants. Pieter Paul provided valuable insights on what can be called a truly representative sample.

After so much intellectual stimulation the day was concluded by a delicious nine course dinner at the Europea restaurant, which had us enjoying extravagant inventions of modern cuisine such as liquified green salad or a beef espresso machiato. The restaurant itself is the result of the shared vision of two French chefs who have worked for some of the finest four-star restaurants in France. The charming and intimate setting provided the perfect location for a delightful evening of interesting conversation along a culinary journey. With such a wealth of professional insight and culinary extravagance amidst the vibrant multiculturalism of Montreal what more can I say than **"La belle Vie"**.



Herbert Höckel
mo'web research
Düsseldorf



Nine new members in

BIA Research

In today's digital world, the internet has changed the way we communicate – email, text messages, chat rooms and VOIP are now part of our everyday lives. So our approach to research uses these new communication channels to get to the heart of what our audiences really think.

We help clients evaluate the effectiveness of their marketing activity through online quantitative research and provide insight on how to make their communication programmes and marketing activities more effective using online qualitative techniques.

Our fully integrated services include research design and analysis through to brandsaction consultancy - advising clients on key actions to develop more effective marketing and communication campaigns.

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G3 Translate

You've gone international. Your materials have been directly translated into at least a dozen different languages. Unfortunately, you've focused so much on the content of the language you've sacrificed crucial attention to context. In fact, some of your material is translated directly verbatim from your source language to your audience's target language without a thought to local customs, dialect, slang, and colloquialisms to name only a few of the things that impact context.

That's why extra attention to local customs, symbology, dialect, and even web page color and iconography is so very important to the whole translation process. At G3 our teams of native expert localisers and quality control specialists are tasked to ensure that each and every G3 translation assignment is a crystal-clear, transparent exact copy of the source material in not only content but, more importantly, in context. Your message is what matters, not the words or characters. The more invisible the language, the more effective your message. That's the goal of superior localisation.

We're here to assist you in every way possible to make that invisibility happen. We are part of the **Gazelle Globalization Group**.

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Establish a clear competitive advantage over your competition with Net-SB! In today's global market research environment nothing is more important than lowering your operating costs without sacrificing quality and speed.

With operations located in Bulgaria's capital city, Sofia, Net-SB provides an exceptional value while delivering deep industry knowledge and superior programming, field management, and data processing skills.

By partnering with Net-SB your business will be enhanced by some of the most highly trained and skilled programmers and project managers in the world.

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Ocucom

Provider of unique solutions. Our overall approach of how we think regarding programming, hosting and managing Internet projects -This is our focus and business.

What we will do, is to understand the research design and data collection methodology, and then take various components of the ocular software solutions we have developed, and mold them together so as to fit your needs and methods. Our business is just not about programming and hosting in a production environment. We are a solutions provider, not a tool provider. We solve problems with solutions. We do not just sell tools.

At Ocucom we have extensive experience in assisting our clients with designing and selecting different types of samples depending on their unique project specifications. The design, evaluation and selection of sample can involve client provided lists, established panels, and/or samples from various other sources. Ocucom™ will also ensure the sample is balanced on a true real-time basis during interviewing as a means of achieving a final sample distribution that is consistent to your project's overall initial sample design.

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Details of another new AIMRI member - Van Hellemond (Netherlands) are on page 7

ers in seven countries

ORCA

ORCA (**Opinion Research Center of Afghanistan**) is the first and the largest full-service Afghan research center operating in the areas of opinion, market and media research.

With ORCA, you have access to a multi-ethnic and gender-balanced team of over 600 experienced interviewers, 34 provincial field supervisors, 100 local monitoring agents and 34 monitoring supervisors in all 34 provinces of Afghanistan.

Through the last six years of research experience in Afghanistan, we have established well-tested working solutions for most of the research challenges in areas where extensive illiteracy, hostility to research and strict cultural restrictions on access to households heavily exist. In addition to this, we managed to develop unique working solutions for most of the research challenges in insurgents/Taliban-led areas. We ensure high quality field work in all provinces of Afghanistan taking in to account each province's unique situation so that each has significant impact on methodologies and weightings applied and the strategic and tactical analysis in the research projects. This therefore, guarantees the best quality of findings/results for our clients.

ORCA helps you make better decisions!

ORCA

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Quality Panels Asia

QPA (2005) is THE fieldwork specialist in South East Asia, with it's HQ in Kuala Lumpur Malaysia and offices in Singapore and Vietnam. Focusing purely on fieldwork as the basis of research, we believe in honest opinions from genuine consumers. QPA = the linking pin between researcher and consumer.

QPA is managed by Lee Joo Lee (with over 15 years of quantitative experience at Nielsen Malaysia) and Sandra van Hellemond (who set up her first qualitative fieldwork agency in Amsterdam in 1997).

Why work with QPA? Besides the fact that we are very experienced and have local knowledge, we always go the extra mile. Can we prove this? Yes, we can: Our clients keep returning and referring us.

Whether you need on-or offline, qualitative or quantitative research, we are your fieldwork partner! We do CATI, CAPI, CAWI, CLT tests, fgd's, idi's, obb's in-home visits, video diaries, product placements & have state of the art venues.

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Socis MR Russia

SOCIS MR Russia is a research company covering the full scope of market research. However our primary focus is fieldwork. In close cooperation with a network of 1200 interviewers and supervisors all over Russia we routinely conduct challenging B2B and B2C projects. Since 1997 we have been successfully using a wide range of research techniques and methods:

- Door-to-door interviews, hall-tests, mystery shopping, desk research.
- We offer our clients a well-equipped call-centre with 60 CATI stations.
- Online surveys are provided by us as well. Our company has access to target groups across a wide socio-demographic range (on the whole 200 000 panelists in Russia).
- Socis MR Russia has a comfortable studio specially equipped for focus group discussions.

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Tochka Rosta Research

Since 2000 we have provided our clients with reliable solutions to make proper marketing decisions. Our methodologies embrace all the classical methods (qualitative and quantitative methods, including hall-tests, focus-groups and in-depth interviews) and innovative original approaches, which take into account the peculiarities of Russian business. Our agency has a large staff of competent interviewers that allows carrying out full-scale research of both Russian and CIS/GUS markets.

We take a disciplined approach to our work, based on scientific standards and best practices.

Tochka Rosta Market Research operates in strict compliance with the ESOMAR International Code of Marketing and Social Research Practice, and observes all recognized principles of impartiality and confidentiality.

We are a member of:

Gildia Marketologov (Russian Guild of Marketeers)
ESOMAR

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Financial services at the crossroads

On behalf of AIMRI I attended the second day of the Marketing Week Conference on **Retail Financial Services** on 19th – 20th January 2009 at the very pleasant Thistle Hotel Marble Arch London. **Jonathan Wheeler** attended the first day and will report in the next edition of Synergie

The topic was very apropos. Indeed on the second day we had news of the collapse in the share prices of all our major UK banks. This did not faze our dogged researchers who carried on as normal with some very interesting papers looking at the retail aspects of financial services.

Day two began with a presentation from **Heather McGlinn** from **Wells Fargo**. She outlined some tips for researchers to optimise the development of new ideas through to execution via the “ideation pipeline” assessing the attraction, alignment and attainability of a business idea. The novel idea they demonstrated was “Settle Up” a way of tracking joint expenses of a group of people so they know where they stand and pay their share of the costs. The premise being that people are generally embarrassed asking for money.

Sharon Rees from **TNS** brought us up to date with state of the economy and pointed out the differing attitudes between the ages with younger groups **far more optimistic about the future** and the attitude drivers being the media and word of mouth contributing to the depressed state we have arrived at. Sharon echoed the previous speaker saying that money is an emotional topic, and therefore financial institutions need to engage better with consumer’s and their employee’s minds through brand image and customer/employee experience.

Colin Buckingham from **Rainmaker** started by asking us how well we knew our databases! Sadly the answer was not very well and he outlined three case histories firstly showing how to get more insight from the data “village” already available by taking it a step at a time and applying relevant solutions in different markets. Secondly, how to develop new segments within a market looking for the ‘Achilles heel’ within companies and talking to stakeholders at all levels. Lastly by defining commercial applications for research; in a difficult year it is important to think differently and react to changes in the market place.

Adam Samuel, an independent consultant, tried manfully to encourage interaction with the audience for his presentation about compliance which he described as a dull subject but inescapable. He advised that there were some poor quality products out there

and some of them were just plain bad and should not be sold. He made surprising disclosures about some products that were not what they appeared to be.

A panel discussion followed featuring **Glyn Perrett** of **Nationwide**, and **Tim Francis** from **Research International**. The discussion ranged from “understanding customer needs”, the pointlessness of differentiation if the business fundamentally does not work and **“trust, clarity and value” as the keywords** for the next few years. Managing customer expectations and broadening research to encompass the variations in different products customers are buying.

There followed a paper from **Adam Elliott**, **Head of Insight** at the energy supplier **Eon**, who are the largest privately owned energy supplier in the world generating sales of €56bn a year, and the largest energy supplier in the UK. Adam took us through this marketplace that has a churn rate of 15-20% and examined the reasons – Why do people change energy suppliers. We, as a society, **break down into**

two groups, pro-active and re-active and this is reflected in the way Eon’s approach to sales. Re-active customers responded to sales campaigns while pro-active customers responded to changes in price, neither group showed any emotional engagement with their energy company and PR played a larger part in driving the market than advertising. A very interesting presentation.

Nigel Spencer introduced us to **Aviva**, a name we may not be familiar with now but we will within the next six months. Yes it is the new name for Norwich Union. He gave us a view on the rebranding of arguably our most well known insurance company in the UK talking about Customer Councils, focus groups held in well chosen venues and **responding to customer concerns**.

We all went our ways... heads buzzing with insights.



Hyde Park, London near Thistle Hotel

John Mackay
Sample Answers
London

Adding value and creating trust in financial services

Marketing magazine have organised a half day Powerhouse conference on Tuesday, 28 April 2009 at the New Connaught Rooms in London.

What do consumers prioritise when they are buying financial services and what is important to them? What do they trust, and how have their needs changed? How can your brand marketing reflect and deliver these demands?

Take just half a day out of the office to hear how marketing directors from companies such as AXA UK, Zurich, Royal & SunAlliance, and National Savings & Investments are regaining consumers' faith in the stability of financial brands at *Marketing* magazine's inaugural half-day conference.

Zone in on building brand engagement and trust, discover how to reach consumers with messages of security and protection without providing cause for concern, and debate what value means to your customers; whether it is a matter of pricing; or the products and protection that your brand offers. Benefit from:

- Comprehensive powerlist – Take home an exclusive 10-point powerlist compiled by the afternoon's speakers to help you implement your financial brand's future marketing strategy back at the office.
- Five director-led sessions – Focus on the essentials of building financial brand trust, communicating confidence, engaging consumers, retaining financial consumers and more.
- Price versus value debate – Deliberate the true meaning of value for consumers and identify means of emphasising your brand's value, whether that means pricing or other types of value.
- Split focus session – Choose between a focus on safety and security, or on promoting protection to consumers.

For further information, including details of all sessions and the speaker line-up, visit our website where you can register online at www.marketingfinancepowerhouse.com, saving £50 if you do so before 19 March.

Marketing

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Gallup Honours CfMC for Software and Service

The Gallup Organisation has awarded **AIMRI** member CfMC Software its 2008 Gallup Premier Partner Award.

John Selix, a Gallup Systems Administrator, remarked, "We use CfMC software for our US operations, but also for those US-based operations in Brazil, Bangkok, Singapore, Hong Kong, Beijing, Shanghai and Guangzhou, China.

Gallup's Budapest operation uses CfMC WebCATI software to interview across 34 countries and in over 40 languages in Europe, including a large contract of

studies for the European Union.

Because of the high level of CfMC's daily support, Gallup cannot imagine a world without CfMC."

CfMC EU Director Stephen Hughes remarked "CfMC has worked in partnership with Gallup globally for more than 20 years. This award is the culmination of these efforts and although all our clients tell us much the same on a regular basis, it is very rewarding to be officially recognised by Gallup."

For more information contact Stephen Hughes on 44 1223 364 836.

Van Hellemond Another new AIMRI member

Van Hellemond & Co is the linking pin between market researchers and consumers. We recruit consumers for qualitative research and operate four unique research locations in The Netherlands.

When it comes to recruitment, one method does not fit all. Your project is unique and so is your target group. How do we cast the right consumers? With creativity, determination and an open mind. The only given is the outcome – You can trust us to always arrive at the perfect group for your purpose.

Conveniently located in Amsterdam and Amersfoort, our facilities are also ideal for meetings and creative brainstorm sessions. **Our goal is to create an environment in which consumer, researcher and client feel equally at home.** All locations are equipped with advanced viewing and recording technology: Remote-operated cameras, ceiling microphones, stereo sound, flat screens, wireless projectors and magnetic whiteboards.

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Web 2.0 research - Two AIMRI members co-operate

John Storey spoke at the AIMRI conference in Krakow (June 2008) and this has already resulted in a successful collaboration with another AIMRI member - Carrick James Market Research. John explained his ideas in the last issue of Synergie. Here we reprint the summary and then gives Carrick's account of the collaboration.

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 and creator of research content and subjects). In many ways Web 2.0 is **a return to the original internet crusade** for freedom of expression.

But don't take my word for it, here's what a researcher client (Carrick James) said...

AIMRI conferences often produce **nuggets of inspiration** which one itches to put into operation. John Storey's talk at AIMRI Krakow on blogs and internet qual surveys was happily followed by a Client enquiry about doing an internet forum and on-line group among young people. With John's advice on our proposal we got the go-ahead and started on quite an adventure.

We recruited eligibles from our panel of co-operating young people and within days the blog was underway. Over two weeks with new questions every few days and at least five visits each, the participants provided lucid, open-minded and insightful comments on a lot more client questions than we had anticipated. Participation rate was about 80% of those who started. But this did involve us sending frequent reminders to participants by email and telephone, and upping the incentive. The beauty of the blog is that clients can look into what is being said, can take copies of quotes (no typing needed) on specific topics, and think of useful follow-up questions.

Some of the snags included difficulties in logging-in, reminder emails being blocked by hotmail if sent in bulk, and more questions than we ourselves (and hence participants) expected.



Krakow

On-line focus group

From the bloggers we invited lucid people to take part in an on-line group. seven of these did so, and went to a special website at a fixed time, together with invisible client observers (who could send secret messages to the Moderator) and invaluable helpers from Blog Research. The Moderator was able to feed in pre-printed questions from the discussion guide, or probes typed in. Picture prompts or verbal concepts could be loaded when required and asked about.

The responses, as typed in by participants, needed to be pasted into Word at intervals. Transcripts were available at the end of the Group. We used and needed three people in our office to keep pace with the activity. It was **great fun and very productive...** though one misses the visual clues and observations of a face-to-face group.

Comments

The comments below are from people who took part in the blog when we finally asked about their reactions to taking part in the blog.

"I think it was an interesting and fun way to complete a survey and I'd like to do it again. I found it very interesting because I have never done anything quite like

this before. I like the fact that you can see other people's reactions and that you can take part in your own time and also do other things whilst taking part."

"I found the blog kinda fun and interesting as it was such an unusual topic and I hadn't done a blog before... It was interesting as it was just so very different and there was such a wide variety of questions to answer. I liked the variety in questions, it was not boring, like a normal survey. I could also do other things at the same time, like msn or that! and it didn't take much time up!

John Storey concludes as follows: **"So my passion for quality has gone on-line as it brings a new dimension to research, new insights, and fast innovation."**

Carrick James,
Carrick James Market
Research, London

John Storey
Blog Research
Elstree, UK