

## WHAT'S BOTHERING YOU? - AIMRI MEETS IN MUNICH



The Autumn 2014 **AIMRI** conference will be in Munich on Friday, 24 October 2014 immediately following the Research & Results Show on Wednesday, 22 October and Thursday, 23 October 2014. The subjects covered will include working across different time zones and compliance procedures with technology and security.

*See pages 2 and 3.*

## MESSAGE FROM THE CHAIRMAN

June is here already, almost half the year gone and I expect that, like me, you wonder how it could have passed so quickly! I suppose it's a truism that, as long as you keep busy, time just flies by and I'm pleased to say that your alliance certainly is keeping busy.

This month we have the Marketing Week Live Show in Olympia, with more member companies than ever taking advantage of the special discount available to exhibit their products and services in the AIMRI village. If you are intending to visit the show (25th and 26th June) be sure to call by and meet some of your colleagues within the Alliance and don't forget to suggest that others should also take the opportunity to visit the AIMRI stand and discuss the benefit of AIMRI membership with Catherine and member companies.

They might even like to join us for the AIMRI dinner on the evening of Tuesday, 24 June - this will be another of our exclusive, gentle social gatherings that always provide

an excellent opportunity for discreet networking.

We are also planning to have an AIMRI lunch on Wednesday, 10 September, immediately after closure of this year's annual ESOMAR congress in Nice. Moreover, there are still some remaining opportunities for members to take advantage of a special rate to have an information point exhibit space for Congress itself.

This new 'AIMRI Village' is a very cost effective way of improving awareness of your products and services to a wider International audience. Please contact Catherine on [info@aimri.net](mailto:info@aimri.net) if you require further information.

Our final AIMRI Village of the year will, of course, be at Research and Results in Munich on 22nd and 23rd October, again please contact Catherine if you would like to take advantage of the opportunity to exhibit at that event.

This year the show will be followed by a one day AIMRI conference on the



**Tony Dent**  
Chairman

24th at a very special price of just £120 (€150) for members and £140 (€175) for non-members - exclusive of the AIMRI dinner on the evening of the 23rd. More information on this conference is provided by John Mackay, conference chairman, in a separate article. Also, please see [www.AIMRI.net](http://www.AIMRI.net) for booking attendance and other items.

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Speaking of conferences, please also take this opportunity to read the write up of the Rome conference as provided by John Attfield. As is often the case with AIMRI events, the excellent speakers deserved a much larger audience, but we all enjoyed a truly excellent set of papers which generated an unusually lively debate. Once again, AIMRI demonstrated the importance of understanding local cultures - even when using the very latest 'techniques'!

So, there will be just the two conferences this year but, planning will shortly begin on next

year's program and I am sure that our conference committee will welcome any views you members have on future conferences. How many? How long? Where? What themes? All ideas gratefully received.

Let me take this opportunity to wish you all a good summer and I hope that we might meet at Marketing Week Live, ESOMAR or maybe Research and Results - maybe all three! Whatever, or wherever, I look forward to it.

**Tony.**

## CHAIRMAN'S NOTES

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Munich, located at the river Isar in the south of Bavaria, is famous for its beautiful architecture, fine culture, and the annual Oktoberfest beer celebration. Munich's cultural scene is second to none in Germany, with the **museums even considered by some to outrank Berlin in quality.**

Many travelers to Munich are absolutely stunned by the quality of the architecture. Although it was heavily damaged by allied bombing during World War II, Many of its historic buildings have been rebuilt and the city center appears mostly as it did in the late 1800s, including its largest church, the Frauenkirche, and the famous city hall (Neues Rathaus).

## CITY OF CULTURE



We are focusing on the practicalities of the research process and discussing the 'nitty-gritty' difficulties we all face day-to-day managing projects:

- What are the technology and security policies that you need to have in place?

- Marketing initiatives - your best all-time effort?
- Cultural differences when working on international projects.
- Working in different timezones and on different days.

## WHAT IS THE MUNICH CONFERENCE ABOUT?

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AIMRI MEETS IN MUNICH

AIMRI will be back in Munich for the **Research & Results** show (22nd and 23rd October) where Catherine will be manning a stand in the **AIMRI** village for members and friends to stop by for a rest and to meet fellow market research professionals attending this exciting exhibition.

AIMRI are also holding our own conference "**What's bothering you?**" on 24th October, immediately following the show, where we will be discussing the practical issues facing your business on a **day-to-day basis**.

Some of the topics we will be talking about include: managing client expectations, handling cash-flow, what to do about late-payers, data protection issues and successful marketing initiatives. So far we are pleased to announce our initial two speakers. Firstly, Ruth Stanat (SIS International) who will tell us how they manage **working across different time zones** on multi-country studies. Secondly, Jack Semler (Readex Research) will be speaking about his recent experiences going through **compliance procedures** with technology and security.

Others also interested in speaking opportunities should contact me, **John Mackay**, Conference Chairman, at the address below or email me at [john.mackay@mr-sample.co.uk](mailto:john.mackay@mr-sample.co.uk)

**John Mackay**  
Mr Sample Ltd  
Amersham UK  
Conference Chairman



We are holding the conference immediately following **Research & Results**, because the show has become one of the leading market research events in Europe, attracting more and more international visitors each year.

It is therefore a great opportunity to 'kill two birds with one stone', participate at the R&R show and afterwards meet fellow professionals at a conference addressing issues that are close to home for all of us. You can also make it a long weekend and enjoy the sights and sounds of Munich.

AIMRI is your organisation and we would love to hear from you whether or not you give a presentation or just listen to the experiences of other delegates.

We are also keen to get more members and will be happy to offer a free annual subscription to any member who successfully invites another member to attend the conference and also joins **AIMRI\***.

I look forward to seeing you in Munich.

**John Mackay.**

\*subscription credit will be applied for the following year provided the new joining member has been elected and paid in full.

## 2014 RESEARCH & RESULTS

The 2014 Research & Results exhibition will be on 22nd - 23rd October 2014 at the M.O.C. Convention Centre, Munich and will again include the AIMRI International Village.

Those wishing to take part should contact **Simone Waller-Klink** on Tel: **+49 71 51 27 08 91** or e-mail [waller-klink@research-results.de](mailto:waller-klink@research-results.de)

# REGIONAL DIVERSITY IN MARKET RESEARCH

## AIMRI MEETS IN ROME



**John Attfield**  
Attfield Dykstra & Partners  
Buchholz, Germany



By popular demand, AIMRI returned to Hotel Imperiale in Rome for its conference on 3rd and 4th April 2014. We were last at this popular venue in 2010, and this great city always retains its allure. The topic this time was "Italy is different - and so is everywhere else!" The conference was held over two days to provide in-depth exploration of factors that influence the delivery of quality international research.

"My face feels like the moon!" After welcoming the delegates on Day 1, AIMRI Chairman Tony Dent opened the conference with this intriguing title. He described his origins as a statistician in B2B market research and the quality control issues involved. Learnings from experience include the need to interview the right person in the organisation, i.e. the person who knows the answers - and to understand relative statistical probability.

He pointed to the importance of differences in national mentality: Italians tend to exaggerate purchase intentions while UK respondents tend to understate and Germans tend to be more accurate.

And the moon? Tony explained this example of differing cultural attitudes to qualitative probing. Iranian males were surveyed on their feelings towards shaving. One replied: "My face feels like the moon when I shave." What did he mean? In that culture, the answer could not be explored further. The respondent's reaction to probing was simply: "But I've just told you!"

Tony's presentation was followed by a lively discussion on the respective merits and challenges of online and F2F sampling and whether the growth of online MR together with pressures on cost has eroded standards across all forms of data collection.

The point was made that online technology has moved on with the result that data quality has improved, but there is still evidence of fraudulent respondents etc. In some Asian markets F2F is still the best, most robust and cheapest method of data collection.

Richard Sheldrake, Managing Director of Perspective Research Services, followed with a paper on data protection in Germany and the impact of changes in EU privacy regulations (see below).

For the next paper, "The Transatlantic View", a special internet link was set up enabling Peter Milla (privacy consultant at Peter Milla Consulting, USA) to present his talk remotely online (see report on page 6).

The first day concluded with an open discussion on data privacy and its impact on MR, followed in the evening by a most enjoyable Gala Dinner at the Ristorante Moma, just a few minutes walk from the conference venue.

Day 2 opened with a brilliant keynote speech by Cristiana Valenti from MPS Marketing Research, Italy, on "Surviving the Euro Crisis - The Italian Way", a panoramic view of how recent economic difficulties have impacted Italian society. She presented data generated from a multi-client study designed by MPS to track and interpret how the economic crisis was influencing consumers. The study is conducted twice per year based on eight focus groups plus 3,000 CATI interviews. It has generated a wealth of information which is analysed by MPS based on two qualitative scales:

**Self-efficacy scale:** Omnipotence / Positivism / Realism / Survival / Impotence.

**Strategy scale:** Static / Rigid / Flexible / Erratic / Chaotic.

# DATA PROTECTION IN GERMANY

Report on the Sheldrake presentation

Germany has led the way in the promotion of data protection and privacy legislation - with the result that German regulations are much **stronger than in other EU countries**.

European MR bodies such as Esomar and EFAMRO are working to prevent Germany's stricter data protection rules from being adopted across Europe. The aim is to preserve the special nature of MR vs. direct marketing e.g. to ensure that cold calling remains legal for telephone MR.

Different EU countries operate different rules for telephone sample management

e.g. "do not call" lists. **Current laws in Germany require positive 'opt in' for marketing activities**, but fortunately MR is exempted from this. In the UK; the key legal issue is protecting consumers from so-called 'sugging' (selling under the guise of market research).

Grey areas still exist e.g. regarding pulse checking of RDD samples from abroad. Discussion after Richard's paper also focused on the handling of online samples, where double or even triple opt-in may be recommended.



With the euro crisis, Italian households have experienced severe reductions in income, leading over time to a sharp drop in perceptions of self-efficacy i.e. a reduced perception of one's own ability to master events, and ultimately to rage and frustration. Households have experienced erosion of savings; growing uncertainty about the future raises the need for defensive strategies and making sacrifices: product categories previously seen as essential have become 'dispensable'. In 2012, Cristiana said people were still 'excited' about the challenge of coping with the crisis, but now the mood has turned into frustration and exhaustion.

The crisis has led to a deterioration in relations between the citizen and institutions of all kinds, with a loss of trust in the ability of politicians and managers to manage e.g. in public transport, health, education, public safety, and even the media. Citizens feel abandoned and politicians are viewed as careerist and incompetent.

Cristiana concluded, Italians are optimists. They are able to see sacrifices as coupled with benefits e.g. instead of going by car I use my bike and keep fit; I feel proud of fixing defects in the home by myself, mending my own clothes etc. **Expectations for the future are relatively positive:** "It can't get any worse!"

The conference continued with a paper on multi-country research by **Federica Sacchi and Stephanie Echeverria from SIS International Research:**

**"Local Methods Provide a Global Perspective"**. The two research executives described their experience in running global projects. All countries are different, culturally and socially, and methodologies may vary greatly from country to country.

For example, Europe takes a more formal approach to organising projects than the US where the main priority is quick response. In Asia it is very important to have all the details of a project settled before any action is taken. Africa by contrast is very communicative and flexible in trying to overcome field obstacles, while Latin America is more laid back; everything takes longer and there is no 'go-getter' approach.

Using a case study of an **automotive project in eight countries**, Federica and Stephanie showed the need to consider local differences while finding ways to 'standardise' the approach to multi-country projects. It is essential to ensure that quality standards are maintained and not sacrificed, but there are many different routes to achieving the standard. The presentation was followed by an interesting discussion about the special features of working with clients from different countries e.g. Korea.

After lunch, **Anumita Sharma, Managing Director of The Third Eye (UK and India), spoke on "Technoculturally Global / Local?"** Aided by data from Anuja Sharma, Chief Diversity Officer at TechMahindra, India. Anumita discussed how culture and

demographics impact technology adoption and therefore research (see below).

In the final paper, **Roy Patel, Managing Director of Cubic Index Ltd, UK**, asked "Will the World Play the Game?" The concept of "gamification" has swept across the marketing industry and is also of interest for MR. The game is on!

A game, he said, is defined as any activity that we do for fun. It is based on a set of rules, the exercise of skill and / or effort, and reward. Technically, all MR surveys are games, just rather dull ones! How, Roy asked, can one 'gamify' surveys to make questionnaires more fun? **Why not make questions into games?**

He presented an exciting new approach to gathering consumer data via truly engaging games e.g. prediction exercises. He showed us a mobile app called **Pryz Manor developed by Upfront Analytics**, in which MR content is embedded seamlessly into the gaming experience. Given that a high % of Smartphone owners play games on their devices, high user retention rates can be achieved. The app can be compared to social media mining: a large volume of data is generated, but with directed instead of unstructured dialogue. The app applies a strict code of practice: no marketing is involved and respondent anonymity is assured.

## CULTURAL DIFFERENCES & TECHNOLOGY Report on the Sharma presentation

Anumita analysed country differences based on a range of cultural dimensions: power distance vs. equality, individualism vs. collectivism, masculinity vs. femininity, uncertainty, pragmatic vs. normative, and indulgence vs. restraint. She discussed these in relation to the UK, India, China, Russia, Brazil and Germany, finding that Russia and China have very high power distance (nothing happens unless the man at the top gives the okay) and high collectivism, while the UK has high individualism, masculinity and indulgence but low power distance.

India and Germany share a low level of indulgence - i.e. a feeling that restraint is virtuous and indulging oneself is wrong - while Brazil has high indulgence: they like to enjoy life, have fun and spend money.

Anumita asked, what is the impact of technology on power distance? This led to a discussion on technology and its impact on MR. In the UK, more research is being done online and technology is very advanced. In India, technological development is less pervasive but a small percentage of the population are very tech savvy. Currently, surveys among the mass of the Indian population can only be done F2F. Only the educated and wealthy have access to the internet and social media, but mobile phones are also becoming widespread. Anumita concluded by showing a video about Dharavi, a slum in Mumbai, and local people's efforts to present the vitality and creativity of their community.

# MEMBERSHIP DEVELOPMENTS

## OLD LINKS WITH SOUTHERN AFRICA CONFIRMED AND NEW LINK WITH IRAN ESTABLISHED

### GfK South Africa

Longstanding AIMRI member in South Africa African Fieldwork Services has been taken over by GfK -- a worldwide MR firm based in Germany with branches in many countries including Portugal where AIMRI member Intercampus is a GfK branch.

GfK South Africa has 51 members of staff, maintains offices in Durban and Johannesburg, and achieved sales of EUR 3.4m in 2011. They have provided clients with data from a total of 33 countries right across Africa.

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### Pars Advanced Research Scholars

Pars Advanced Research Scholars (PARS) is a leading independent full service research and consulting company headquartered in Tehran, Iran. Drawing upon the expertise of a diverse composition of distinguished scholars and professionals, PARS is recognised as an innovative and dynamic firm that delivers high-quality services at competitive prices. Unlike most consulting firms in Iran, PARS is particularly unique in that it does not have any specific sociopolitical orientation, is not affiliated with any social or political/governmental entity, and is proud of its commitment to preserve its independence, professional integrity, and scientific objectivity.

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## THE TRANSATLANTIC VIEW Report from Rome on the Milla presentation

Peter spoke authoritatively about privacy and data security regulations in the US and their implications. Privacy and respondent confidentiality are a core concept in MR and are included in industry codes and guidelines. But in the pre-online era this was thought of primarily as the protection of survey data. Now the digital era has raised new concerns about privacy of communications, etc. There is a symbiotic relationship between privacy and data security, Peter said - they are not synonymous: **'security' is about confidentiality and integrity of data; 'privacy' is about preventing misuse of data.** Companies are required to enact data security policies, but security is a means to an end which is data privacy.

There are different laws and regulations in different jurisdictions. In the EU, privacy is seen as a right that is equivalent to other freedoms; in the US it is seen as a commodity - it is regulated by the courts and **claimed invasions of privacy must demonstrate tangible harm.** The US lacks a comprehensive regulatory framework on privacy - some regulations are Federal, some at state level, some by the FTC or other agencies.

Peter described the various forms of US regulation impacting on data privacy. Some have a direct impact on MR e.g. the **Federal "Do Not Call" registry** which currently applies to telemarketing but some states are pushing for it to be extended to MR. **"Safe Harbor" rules for the handling of personal data** were developed by the US Department of Commerce in cooperation with the EU Commission and are enforced by the FTC. "Safe Harbor" is a way for US companies to avoid legal challenges in the EU. It impacts on the collection and transfer of data on respondents in the EU by US firms.

He concluded with a summary of the factors that MR companies must **consider with regard to data security.** Perhaps inevitably, the subsequent discussion centred around the NSA and its activities. Peter commented that the problem with the NSA is its wild collection of data on the basis of claiming to protect national security. But he added: "At least there's one part of the government that actually listens to you!"

**MWL '14**  
Marketing Week Live  
25-26 June 2014 | Olympia Grand | London

## AIMRI Village larger than ever at MWL 14

### From the organisers

MWL welcomes 3Q Global, GMO, GfK (sub sahara), G3 Translate, Inter@ctive MR, Kinesis Survey Technologies, mo'web, SIS International and Sample Answers to this year's AIMRI Village within the Understand Zone, part of the 2014 Marketing Week. We at Centaur Communications are always pleased to have AIMRI's support for this leading marketing event which attracts over 12,000 visitors from all over the world. For further information go to [www.marketingweeklive.co.uk](http://www.marketingweeklive.co.uk)

### From the villagers

**G3 Translate** is pleased to be participating in the AIMRI Village again this year at Marketing Week Live in Olympia. We not only enjoy seeing our fellow AIMRI members in the village, but have found that being present offers the opportunity to develop strategic partnerships with them. In addition, having a stand allows us to meet a good number of international researchers who may not have otherwise found us. Therefore, we will continue year after year to support AIMRI and remain 'villagers' so long as they will have us.

Why are **Sample Answers** taking advantage of the AIMRI Village at the Insight show? Because the Village offers a higher profile and better value for money than having a separate stand. Also, as chairman of AIMRI and chairman of Sample Answers, it's good to be able to combine responsibilities in a congenial manner to everyone's advantage!

We at **GMO Research** are very excited to be part of AIMRI, this Partnership provides us with great opportunity to develop our business not only by getting connected with other members but also with fellow professionals worldwide.

## 5 MARKETING TRENDS & HOW MR MUST RESPOND

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([www.quirks.com](http://www.quirks.com))

**Brian Fletcher**  
Insights in Marketing



### Article Abstract:

Insights in Marketing LLC conducted research on research to create a list of potential MR trends for 2014. The author outlines five predicted industry trends and discusses how researchers can make the most of them.

As 2014 rolls right along, it's filled with great promise and opportunity, as well as great challenges. With advances in technology, psychology, data collection and the manner in which we understand consumer behavior, it's important, as marketing researchers, that we do more than just track buyers. We need to make it a priority to understand the industry as a whole - and that includes understanding ourselves.

This year, as in past years, Insights in Marketing LLC committed to taking stock of what we, as marketers, learned in 2013. By delving into all of the data swirling at our fingertips, we've applied it to the future and devised a list of the top five trends impacting the marketing research world in 2014:

#### 1. Less is more

The Internet is changing how we consume information. Whether you think the Web is making us smarter or dumber, one thing is certain: Consumers prefer simple messages to in-depth screeds. Easily-repeatable messages and powerful images work better to tell stories while also

increasing consumer engagement and sharing in digital and social media.

Marketing researchers must help marketers address this trend by identifying the briefest, most compelling and most motivating messages about a product or service. To support this objective, research projects themselves must be more focused and more flexible, driving directly to the heart of the issue. By designing studies with fewer respondents, smaller focus groups and shorter surveys, researchers adapt flexibly and nimbly to changing needs while providing streamlined information.

#### 2. Content marketing becomes evermore useful

Content marketing - the process of providing information online to drive traffic, inform and engage consumers - is growing in importance in nearly every industry. This type of marketing provides information and guidance without a blatant sales push. Content moves customers down the marketing funnel, providing the necessary information at each step to increase interest, answer questions and overcome objections. Because content marketing and traditional selling are so vastly different, marketers often struggle to find the balance between the two.

Continued on back page 8 ...



## 5 MARKETING TRENDS & HOW MR MUST RESPOND

... CONTINUED FROM PAGE 7

Wilmette  
Illinois



Brian Fletcher  
Insights in Marketing



Marketing researchers must help marketers understand what content is helpful and engaging. MR also needs to identify what content is needed at various points throughout the purchase process and pinpoint what moves consumers most effectively to make a purchasing decision. Whether you're sharing survey results or telling stories uncovered in qualitative research, content marketing provides helpful and engaging information to consumers.

### 3. The integration of social, digital and traditional marketing grows in importance

A decade ago, it wasn't unusual to find marketing and Internet activities managed by entirely different departments within a company. Those days are long gone, as technology and marketing integrate to **create more effective programs for consumers. Providing the correct message through different channels can be the difference between success and failure.**

Marketing researchers must help marketers understand how consumers process information from all of the various channels to make purchase decisions and imprint the image of a brand. Research and tracking models and methodologies must adapt to include new communication channels and purchase behaviors, as well as help define new metrics for measuring success.

### 4. One size does not fit all

As new marketing tools and techniques emerge, **marketers must continually evaluate and use each to their best advantage**, incorporating them within their overall marketing strategy and mix.

**Marketing researchers must stay current and well-versed in all of the tools available to marketers.** Traditional marketing research techniques and methodologies must evolve to accommodate these new marketing tools. Today, no single

approach will suffice and often several approaches are combined for maximum impact. **'Little data' must work with big data to turn numbers into insight, and insight into action.** Mobile research must be used to understand the dynamics of mobile as well as traditional marketing, while taking advantage of **video, geo-location and photos to help consumers convey their in-store experiences.** Continual innovation in new technology in the application of our tools and techniques is a critical success factor.

### 5. Context is key

It is no longer enough for marketers to understand consumer demographics and purchase behavior. To achieve a stronger competitive advantage, marketers must go below the surface to find **strong connections with consumers.** The **traditional demographic and attitudinal models marketing researchers have used to segment and understand consumers are no longer sufficient.**

Marketing researchers must uncover new and innovative insights into consumer behavior that are **more predictive of buyer behavior and indicative of consumer motivations.** New methods for going deeper to understand consumers' underlying values, habits and personalities (which are unlikely to change much over time) will steer us beyond demographics and establish a clearer picture of who the target consumer is, as well as enable marketers to create breakthrough messages. New views into consumer motivations for purchasing will deliver **deeper insight and optimise consumer engagement, sales and loyalty.**

### A clear focus

As we move into the thick of 2014, it's obvious that an integrated digital approach that has a clear focus is crucial to success. As always, that focus should be on insights - and the consumer.