

synergie

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The newsletter for our worldwide community of market researchers

WELCOME FROM THE CHAIRMAN

Welcome to the first Synergie of 2014, successfully demonstrating the continuing vitality of **AIMRI** by providing details of recent new members and heralding next months' **Rome conference**.

Meanwhile, behind the scenes there have been a number of changes to our administration, the most important being that, at the end of 2013, **Richard Chilton** stood down as chief executive after over 20 years of wonderful service to the Alliance. **Catherine Harston**, for long Richard's loyal assistant, has taken over all the details of our administration whilst Richard continues to work for the Alliance as editor of Synergie. So there's no retirement party as yet!

Moreover, I am hopeful that Richard will shortly start work on a new online publication designed to provide useful hints on '**how to research in different countries**'.

Covering the globe from Afghanistan to Zimbabwe, I am hopeful this online tool will eventually become a must look up, whenever anyone is thinking about a new research project in a different country.

The type of hints we are looking for are that mobile phones are the best means of getting a national survey in either of Afghanistan or Zimbabwe – even for business research! Another example was provided by **Ricardo Modolo of Uniquist, Brazil** at last year's London conference, when he advised us that for telephone research in Brazil you need to provide a sample of 15-to-1 for each response required in the major cities, whereas 5-to-1 is sufficient for the countryside.

I guess that might be a similar fact in other countries. Anyway, what's your hint for your country? Would



Tony Dent
Chairman



Catherine Harston



Richard Chilton

you like to sponsor this online publication by advertising on the web site (**only £100 per annum, €120 or \$150**).

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REGIONAL DIVERSITY IN MARKET RESEARCH - AIMRI MEETS IN ROME



The **SPRING 2014 AIMRI** conference will be in Rome on Thursday, 3 April and Friday, 4 April, 2014. The subject will be:

"Italy is different - and so is everywhere else!"

See pages 2 and 3.



Indeed the reality that different countries often require a different approach to a research project as a result of cultural, geographical or even technological differences provides the theme for our forthcoming conference - *“Italy is different - and so is everywhere else!”*

With papers including coverage of data protection in the EU and the US, the use of games in mobile research and a case study covering Africa, Latin America and Eastern Europe, plus a keynote speech on *‘Surviving the Eurozone Crisis’*, this is a must attend conference that provides delegates with the opportunity to understand many of the factors that influence the delivery of quality International Research.

Conference proposals

There is, of course, major competition within the area of conferences and seminars and we have now introduced a new committee to recommend the way forward on these for **AIMRI**. Under the chairmanship of **Jack Semler** (Readex Research, USA) members are **John Attfeld** (Attfeld, Dykstra and Partners, Germany), **Federica Sacchi** (SIS, EMEA, UK) **Tariq Mirza** (Kinesis, UK). Members with ideas on dates, locations or themes please contact one or other of them or the office (or me).

Now - back to our administrative changes. These include the fact that we have now engaged **Perfect Business Solutions** of Windsor in England to handle all our accounts information and we have moved our registered office from Richard’s private address to: **AIMRI, 3a Rydings, Windsor, Berkshire SL4 4HF, UK** and we have a new **AIMRI** telephone number: **+44 (0) 20 30 111 303**, which either Catherine or accounts will answer.

New members

As a final note, I am pleased to welcome all our new members and, in particular, to congratulate **Opinium** on their award from the MRS for best International Research for a UK company!

That just leaves one thing to say – please support your alliance by recommending it to fellow travellers whoever they are and wherever they are. Also, why not come to Rome? **It will prove invaluable.**

My last plea is to those who have not, as yet, paid their membership fees for 2014 - please now do so!

All the very best to you all, Tony.

CHAIRMAN’S NOTES

... continued from page 1



St Peter’s Rome



Tony Dent
Chairman

The Rome conference on **regional diversity** will take place on 3-4 April 2014. Here are some of the points to be discussed:

- Differences in conducting **international research** between the United States, Europe, Asia, Africa and Latin America.
- The **data privacy** question – views from Germany and the United States.

- A project to detect, interpret and monitor **how Italians feel** about the social and economical environment in which they live.

- Will India lead the way in **adapting technology** to suit their culture and demographics.

There will be **open forums** in which delegates can discuss the issues raised in the presentations.

WHAT IS THE ROME CONFERENCE ABOUT?

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INSIDE THIS ISSUE

DIFFERENT CULTURES & ECONOMIES

Colosseum, Rome



The SPRING 2014 **AIMRI** conference will be in Rome on Thursday, 3 April and Friday, 4 April, 2014. The subject will be:

“Italy is different - and so is everywhere else!”

Some of the points to be discussed are outlined in the panel opposite.

Rome

Rome Italy is one of the most popular tourist destinations in the European Union. Visitors come from around the world to see world-famous landmarks such as the Colosseum, the Forum and the Pantheon. Other popular sights are

the Trevi Fountain, the Spanish Steps and the Piazza Navona. At Vatican City, visitors can visit St Peter's Cathedral and enjoy its fountains, statues and the beautiful dome. At the Vatican Museum, you won't want to miss the masterpieces by Leonardo da Vinci and Raphael or the Sistine Chapel.

The hotel for the **AIMRI** meeting will be the Imperiale on the Via Veneto.

This will be another stimulating event in an unique environment. For more information please contact: **Catherine Harston (tel +44 203 0111 303 email info@aimri.net).**

STETHOSCOPE - FEELING THE ITALIAN HEARTBEAT



Cristiana Valenti
MPS Marketing
Research Bergamo, Italy

“**Stethoscope**” is a research study designed by **MPS Marketing Research** three years ago. Its purpose has been - and still is - to detect, interpret and monitor how Italians feel about the **social and economical environment** in which they live.

“Stethoscope” aims to go beyond consumer behaviour and understand how Italians’ perception of the country’s social economical and political situation **moulds them as consumers**.

The study begun in early 2011, when the 2008 European financial crisis was rationally acknowledged but dismissed by my co-nationals. The extent to which the crisis would have affected their own individual life was yet to strike them to the fullest extent.

However, the reason we at MPS decided to carry out this study, one encompassing Italy as a whole, was not the Euro crisis itself but the feeling that consumer perspective was **changing rapidly and for good**. To do so, we started with 16 focus groups in 2011, followed by another set of 16 coupled with 6000 quantitative interviews in 2012 and 2013.

A large scale **qualitative and quantitative study** was necessary as we wanted to examine the Italians’ lifestyle in regards to several areas. The full list of areas is comprised of:

- Household finances: management of resources, savings, sacrifices

- Changes in consumption habits
- Employment
- Public services: healthcare, transport, education.
- Security and safety
- Means of information
- Relationship with institutions and authorities
- Expectations for the future

In each and every of these categories our life has undergone a **major transformation** and not for the best. Regardless, true to the Italian ‘art of resourcefulness’, we have developed **strategies to cope** with the challenging times we are faced with. The strategies, together with an overview of the Italian heartbeat will form the core of my **keynote speech** on 4 April 2014 at the **AIMRI** conference in Rome.

One final word to thank the sponsors who made the study possible: While it was partly financed by ourselves, the gargantuan task required more than our own expertise and finances. A substantial share of the capital needed was covered by a major Italian national radio organisation, **RDS**, a web company belonging to an international insurance group, **Quixa**, and a well known local retailer, **LD Market**.

Thank you for your time, I hope to see you all in Rome.

NAVIGATING GLOBAL DIFFERENCES



Federica Sacchi
SIS International
EMEA Region



Stephanie Echeverria
SIS International
LATAM

ABOUT THE AUTHORS

There are a number of differences in conducting international project management and fieldwork between the United States, Europe, Asia, Africa, and Latin America. Different assumptions on project start dates, approaches, deadlines, methodologies, analytical tools and forms of communication.

As the world becomes more globalised and with the **rise of emerging markets**, these factors will increasingly impact and influence the course of research projects.

But how are projects best approached amidst all of these differences? For example, while in one region flexibility and practicality may be key points of emphasis on a project, formal processes might be priorities in another. Whereas, for example, in some cultures a hierarchical project structure may be seen as best, a 'flat' project structure might be seen as better in another.

With the rise of emerging markets, these differences may become even more pronounced. This can raise interesting questions as they relate to market research projects.

In Asia and Latin America, for example, if clients or field teams emphasise harmonious relationships over cost and deadline priorities, how do European and Western companies balance their priorities?

In Africa, where some methodological issues may exist, how can methodologies and expectations adapt while achieving the project objectives?

How are differences, if they emerge, best handled?

Stephanie Echeverria and Federica Sacchi bring new perspectives on international and multinational projects. From their **experience in different regions** and in international projects, they provide their perspectives into **cultural, historical, and social differences** in Market Research.

They provide insight on how international researchers can balance factors amid cultural differences, and insights on how to achieve communication and understanding.

Sacchi and Echeverria examine how companies approach the methodological and cultural differences in the same project and the challenges and opportunities in bringing together **different skillsets and approaches** to maximise the research outcome.

They also explore the diverse backgrounds, attitudes toward flexibility, methodologies and intercultural communication strategies that help support **effective project execution**.

Federica Sacchi is currently the Managing Director of SIS International Research's EMEA Region, which is headquartered in London, UK. She is responsible for the management and sales of market research, market intelligence and strategy solutions across Europe, Middle East and Africa.

Stephanie Echeverria, is the Manager of the LATAM at the New York headquarters, and brings perspectives from the Americas and other regions.

In 1984, **SIS International** was established as a market research firm in

New York City by **Ruth Stanat**, an early member of **AIMRI**. Over 30 years, SIS International has conducted projects in North America, South America, Europe, and Asia, and has offices in many of these regions. SIS provides fieldwork, data collection and strategic market intelligence solutions worldwide. The company has a focus group facility in New York City.

Federica Sacchi and Stephanie Echeverria will speak on this subject at the AIMRI conference in Rome on 4 April 2014.

INSIGHT SHOW 2014

The 2014 Insight Show will be on 25 - 26 June and **AIMRI** will host the International Village - again at Olympia, London. **Those wishing to take part should contact: David Mallett - Sales Manager on Tel: +44 20 7970 4471 or email david.mallett@centaur.co.uk**



Opinium Research, the full service market research agency offering quantitative and qualitative marketing research and consultancy across a range of sectors, picked up the International Research Award at the MRS (Market Research Society) 2013 awards dinner, held on 9th December 2013.

They won the award for their work with the London School of Economics, entitled “**Inside the Mind of a Voter**”. The project directed by Dr. Michael Bruter, and Dr. Sarah Harrison at LSE and carried out jointly with Opinium Research breaks new analytical and methodological borders in our understanding of the **relationship between citizens and their political systems**.

It also pushes boundaries in opinion research and offers unprecedented ethical care in studying one of the most intimate aspects of human behaviour, **their electoral choice**.

To better understand the psychological mechanisms at stake during the moment someone casts their vote, the project relies on the super-imposition of quantitative and qualitative methods including, multi-wave, multi-year, multi-mode surveys (over **15,000**

respondents so far in twelve countries); in-depth narrative interviews; spot-interviews (“in just one sentence, tell us what went through your mind whilst you were in the polling booth”); lab experiments (e-voting, social media campaigning, and an unprecedented **visual experiment** that filmed the shadow of voters through the curtain of a polling booth).

Also involved were ‘natural’ experiments (on postal voting, advanced voting, etc); election diaries where voters recorded their daily thoughts throughout the election period; and direct observation in polling stations by official election observers.

The team co-operated on the project design, fieldwork logistics, and followed a stringent ethics protocol aimed at ensuring **full anonymity** and the secure handling of sensitive data, to ensure absolute methodological transparency.

Opinium Research was also a finalist in the **Best Agency** category.

A full summary of the “**Inside the Mind of a Voter**” project can be found here - <http://www.opinium.co.uk/research-services/case-study/mind-voter>.

Opinium have recently joined AIMRI and more details appear on page 6.

INSIDE THE MIND OF A VOTER



James Endersby, Managing Director, Opinium Research, commented: “We are delighted to have won this **industry accolade** and to have been shortlisted for best agency. The outcomes from this project have already had a **significant impact on policy making**; it has been discussed by Peers in the House of Lords on the EU bill and has been presented in a report on youth participation at a meeting in the European Parliament.”

“Our work with the LSE showcases the scope of work we can offer clients, and breadth of our research capabilities.”

Dr. Michael Bruter, LSE says: “This extremely prestigious Best International Research Award that our LSE team and Opinium Research have jointly received from the Market Research Society tells the story of a **wonderful collaboration**

between our two teams. The MRS philosophy is that **'evidence matters'** and our project shows that big ideas, innovative methods, and impeccable fieldwork are all needed to come up with ground-breaking evidence.

“I think it is fair to say that we are proud of working with Opinium as they are of working for and with us, and that says a lot about their **exceptional commitment** to their clients.

“Finally, it is important for me to thank the **European Research Council** which is funding our research: the MRS committee praised the way our project re-engages citizens with the electoral process, and this shows how intelligent public funding of cutting-edge research can genuinely improve the lives of citizens.”

COMMENTS ON THE SURVEY

NEW MEMBERS

Kinesis Survey Technologies

Kinesis Survey Technologies LLC is the industry leader for **future-proof** market research solutions. Kinesis provides the industry's most comprehensive market research product suite for the market research professional.

Kinesis solves all of your data collection requirements in one solution -- from surveys, panel management, and communities -- and across all browser and device types. Kinesis is committed to **advancing innovation in both desktop and mobile research**. Delivering intuitive, state-of-the-art applications, Kinesis software products can be effectively utilised **without deep programming knowledge** yet are robust enough to perform the most complex of survey and panel functions.

Kinesis offers product versions for both the market research industry and enterprise business organisations and proudly supports next-generation research applications worldwide. Kinesis has provided **mobile survey technologies for over 10 years and is a global leader in this domain**.

Tariq runs the London office and is an **AIMRI** Council Member. The head office is in Austin, Texas.

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Konkret Marktforschung

Konkret is a market research agency based in Germany conducting research for national and international clients. Since 1995, we are offering quality market research services in the following areas:

- **Field Services:** Qualitative and quantitative, in Germany or all over the world, in-home, in-hall, by phone or online – we provide a **wide range of data collection methods** with more than 2,800 interviewers in Germany and Austria and with world-wide cooperation partners. Our experienced field team organises your researches smoothly, accurately and in time – even for hard-to-reach target groups and challenging time schedules.
- **IT Services:** Our own software solution **Onquest** offers maximum flexibility and enables us to set up your research individually according to your and/or your clients' wishes and needs.
- **Fieldwork & Full Services:** We accompany our clients, national and international companies, **throughout the whole research process**, from concept development to presentation of the results.

We are looking forward to cooperating with you in the future.

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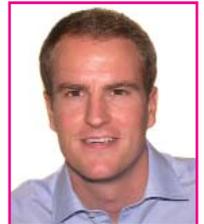
Robert Schulze

Opinium Research

Opinium Research is absolutely delighted to have joined **AIMRI**, especially right after winning the MRS award for International Research for our work with the London School of Economics and the European Research Council in **12 countries**, and as finalist in the best UK agency under £20million, 2013 (see also page 5).

Opinium is a research and insight generation agency based in London. We help organisations get to grips with the world in which their brand operates by ensuring we develop the right approach, methodology and questions to deliver robust insight, targeted recommendations, and address specific business challenges.

We own and manage our own UK consumer, small business, investor and **financial adviser online panels**. We conduct quantitative and qualitative research for clients, supported with secondary research from our Market Intelligence team, all combined with advanced analytical approaches, to ensure we provide results our clients can use, and in a format they can easily digest.



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PLM Market Research

PLM Market Research is a full market research company and works in France with offices, call centers and moderation rooms in Paris and Agen (nearby Toulouse) but also in the rest of the world with offices in London and São Paulo. We have built an international network of market research companies in **Europe, North and South America**. All of them are ESOMAR members.

During the Last 27 years **PLM Market Research** has proved to be a very creative company. Indeed we have set up 12 new original methodologies.

This is mainly due to the help of Philippe Lespinet who is a specialist in creativity techniques based on the american **Synectics set up by William GORDON**.

We mainly perform in techniques combining the observation of the consumer when shopping and the declarative attitude when explaining his shopping act. (Obserview® In-Situ) using glasses equipped with a micro camera.

We now cross what consumers say in classic focus-groups with what they tell us in online questionnaires (Creative Jump®).

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REVIEW OF THE GRIT REPORT

4th quarter of 2013

New York



Methodology

GRIT respondents are recruited by email from lists of research providers and clients contributed by GRIT partners and by invitations delivered via social media channels. The sample size for this latest wave was larger than for any previous study (by almost 1000 completes). The global composition of the sample was also broader than ever before, with much more robust subsets from Europe and Latin America.

For this report, the analysis is based on 2,229 completed interviews, although for some questions base sizes may be higher or lower due to skip patterns, rotations, routing, and other factors. The mix of respondents has varied over the 12 years of the study, but within fairly narrow bands. We hold relatively steady at 80% of respondents being suppliers and 20% being clients, broadly consistent with the last several waves of the study.

The report can be accessed at:
<http://www.greenbook.org/grit>

Introduction by Leonard Murphy

Welcome to the 14th edition of the GreenBook Research Industry Trends Report, using data collected in Q4 of 2013. 2013 was a pivotal year for our industry as the long-predicted wave of change finally began to hit and we are cautiously adapting to the pressures of our environment. We use the **GRIT Report** to quantify these trends and share the findings with the global research community.

GRIT explores the beliefs held by those who know the industry best, the sentiment around those beliefs, and the impact of change. **GRIT** continues to track trends that it has historically focused on, including the adoption of emerging technologies and methods.

We showcase the **GRIT Top 50 companies** perceived to be most innovative and dive deeper into what makes a company innovative. For the first time we use cognitive neuroscience to understand the views of **GRIT** respondents.

Also new in this edition is a series of thought-provoking commentaries, providing a deeper context for the report's findings.

Adaption to change

Notably, there is a common theme among suppliers (33%) that clients are spending more on in-house technologies, while clients (38%) see themselves doing more with the same resources.

Only about a fourth of clients (24%) plan to invest in new technology while 30% of suppliers plan on significant investments in the near future. This may be due in part to the relatively slow conversion of suppliers to mobile-based platforms.

While clients have become more adept and efficient within smaller budgets and smaller staffs in 2013, they also continue to manage more chronic issues such as **declining response rates, limitations with self-reporting, and the need for faster execution**. As a result, many client organisations have chosen to exert more control and have transitioned a significant amount of data collection to in-house platforms.

While client researchers have displayed a strong preference for customer centric research, the role of behavioural insights is **potentially the most significant factor** in their decision process.

As researchers become more accustomed to benefits and limitations of communities, new techniques will likely enhance the learnings associated with interactive response, data analytics, and community dynamics rather than new methods of stated data extraction.

Qualitative Research

While many Focus Group facilities are expanding their support for other activities, including mock trials and product testing, researchers still value this technique more than any other qualitative approach, with 59% of respondents using the technique in 2013, virtually unchanged from the year before. Likewise, IDIs (In Depth Interviews) still maintain their strong appeal.

In-Store/Shopping Observations made up twice the proportion of qualitative projects in South America and the Middle East/Africa (~12%) as they did in North America, Europe, and Asia/Oceania (~6%). Focus Groups and In-Person IDIs were the number one and number two techniques regardless of region.

Quantitative Research

Online surveys continued their growth, rising from 78% of respondents using online surveys in the prior year to 82% in 2013. Mobile surveys showed also increased by 4%, reaching 27% usage in 2013. Both techniques are cannibalising CATI (Computer-Assisted Telephone Interviewing), face-to-face interviews, CAPI (Computer-Assisted Personal Interviewing), and mail surveys.

Online and mobile surveys make up nearly half (49%) of all quantitative projects worldwide, representing 61% of projects in North America but only 28% of projects in South America and 23% in the Middle East and Africa.

See conclusions on the back page...



SEARCH FOR INSIGHTS

Conclusions of the GRIT Report by
Leonard Murphy - see also page 7

The **GRIT** Report tries to fill in the information gaps with data so that stakeholders can make informed decisions with a higher probability of success.

There are only a handful of us around who are not in the business of market research any longer but are making the market research industry our business. In essence, that means that I talk to a lot of people, I read a lot about topics important to MR, and I have the privilege of being asked to help many folks solve their business issues as they relate to insights. What I learn forms my own context, so when I read **GRIT** it's through the lens of what I know to be true from my own experience.

Here are some of the lessons I learned in 2013 that impact my view of **GRIT** data. Perhaps it will be useful as you put your own pieces together.

1. Insights are beginning to be sexy for investors: As more and more of the mechanics of research shift toward scalable technology and IP, **investors are beginning to find our industry interesting.** Every week now brings news of new investments in analytics, data collection channels, and insight-enabling technology. Often those businesses don't fit into the traditional definition of market research, but make no mistake: they are insights plays and **money is pouring in at an accelerated rate.** That is good news for those embracing tech and looking for growth capital, not so good news for service-based businesses operating in an increasingly competitive and margin-squeezed environment.

2. Clients are taking the bull by the horns: More and more client organisations are becoming very actively involved in transforming the industry. Dozens of global brands are engaged in some type of future-proofing of their insights capabilities. Whether through funding innovation labs, startup accelerators, or direct investment, brands are taking **an aggressive role in helping create the solutions they need to fuel insights-driven competitive advantage.** Single-source data, neuroscience, Big Data, image analytics, wearables, 3D printing, interactive visual displays, virtual reality, and omni-channel media engagement is where their interest lies.

3. It's about relationships but cheaper, faster better are important too: Since I am often asked to help brands identify and engage with new suppliers, I know the cheaper, faster and better factors are paramount. Suppliers need to understand that the same old ideas are just not acceptable anymore, no matter how good you think your relationship is or how captive the client is to your trackers or norms.

I believe that the future is bright, just different. In a world driven by data and characterised by complex human behavior we can and should be the heroes if we can let go of the past and embrace the possibilities of the future. If you take nothing else away from this edition of **GRIT** I hope you'll hold on to this: As long as we stay focused on delivering business impact, value, and innovation, MR will be just fine.

New York - home of the GreenBook



Adoption of new research methods

This section looks at the adoption, by clients and suppliers, of new research methods, and the barriers to adopting new approaches. In evaluating the current picture and changes from the previous year it should be noted that two new research methods have been added to the survey this year: Big Data Analytics and Micro-Surveys.

Micro-Surveys have entered the table at just under halfway up, with 19% saying they already use them, and 38% considering them. Micro-Surveys are an essential element of the new type of market research that many are predicting, so it will be interesting to see if their ranking is even higher next year. The other new entrant is **Big Data Analytics**, with 31% saying they already use it and 38% having it under consideration.