

Building the global network

This will be my last letter to you as Chairman as I will be standing down at the next annual meeting in Krakow. This will be one of two very exciting events this year. Krakow is a very beautiful old town and the conference is at a very central hotel. Covering many aspects of conducting research in Eastern Europe we have speakers from various countries and experience who I expect to lead us into interesting areas of discussion. For those coming along who have a half day spare a visit to Auschwitz is an unusual but memorable opportunity.

Preceding the ESOMAR event in Montreal we will be holding our first AIMRI conference outside Europe. This is a very note worthy activity as it goes hand in hand with the development of our membership which sees members from twenty nine different countries, thirteen of which are outside Europe.

We are getting some very strange messages from the economy at the moment, in some areas market research business seems to be very quiet, many companies are holding back on projects or just booking work at the last minute. On the other hand there are still large mergers going on (see the current GfK – TNS discussions and the interest being shown by WPP) where many obviously see the future of market research as strong in the medium to long term.

An opportunity

This is an opportunity for us to use the strength in depth of the AIMRI

**Wherever possible
..... we use the
services of other
members**

membership and help each other over the short term by making a special effort to ensure that wherever possible when conducting multi-national projects we use the services of other members. There is of course within that the implication that members, when asked to quote, will also provide the best costs they can for other members.

Suitable members

To help you do this you can of course use the AIMRI website search engine (see below) to help you identify the most suitable members but if you have any particular services you feel would be of benefit to other members now is the time to let them know. Either email your colleagues about yourself or let us know and we can put any interesting news items in Synergie or on the website.

AIMRI search engine
<http://www.aimri.net/MEMBERindex.asp>

Having now well over one hundred members AIMRI is going from strength to strength. During my time as chairman it has truly become a global rather than an European network and I look forward with interest to see in what direction our new chairman will take us.



Gerry Stacey,
Chairman

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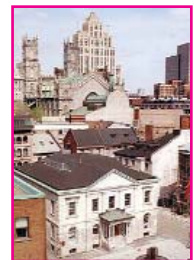
September meeting - Montréal

A survey carried out by **at random international** established that many AIMRI members would welcome a meeting in Montréal in the week prior to ESOMAR i.e. 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 etc.**

For more detail see next page or contact **Richard Chilton** (tel +44 20 8780 3343).



Montréal
see page 2



Meeting in Canada by popular demand

A survey carried out by **at random international** **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.



“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 Loews Hôtel Vogue

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).**

Arab world online

Launched officially in September 2006, Maktoob Research combines the region’s largest online consumer panel with the latest in international online research standards, to provide marketing professionals with better insights on consumer needs and expectations.

Two million Arabs covered

Maktoob Research offers a global online consumer panel covering approximately two million Arabs in the GCC (UAE, Saudi Arabia, Oman, Qatar, Bahrain and Kuwait), Levant (Jordan, Palestine, Lebanon, Syria) and North Africa (Egypt, Morocco, Sudan). Maktoob Research has many socio-demographics available, such as gender, age, occupation, industry, and also information on their members’ usage of IT/telecommunications, usage of FMCG, travel habits and media consumption.

Maktoob Research Omnibus

To know more about your campaign, ad recall or other

questions that you need answers for, add up to 10 questions including visuals to our Omnibus. This survey is running every month among 500 adults in the United Arab Emirates, Saudi Arabia, Jordan, Egypt, Morocco and other Arab countries.

Quality control procedures

We apply the same quality control procedures to our omnibus as we do for our more customised ad-hoc studies, making this shared-cost study an effective means for gathering quick and accurate feedback!

In addition to **AIMRI** Maktoob Research is a Full Member of ESOMAR, MRA – The Marketing Research Association, and an Associate Member of MRS – The Market Research Society.

Tamara Deprez
Maktoob Research,
Dubai, U.A.E.



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 20 June 2008	Grand Hotel	Krakow, Poland	Krakow
Fri 19 Sept 2008	Loews Hôtel Vogue	Montréal	Montréal

Subjects:

For June 2008 the subject is:

“Research in Central & Eastern Europe”

For September 2008 the subject is:

“Completing difficult research assignments”

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 e-mail **vanessa.norris@centaur.co.uk**

CEE Markets Are Not Created Equal

For a long time, all **Central & Eastern Europe (CEE)** countries were considered as one entity, labelled as the 'Soviet Bloc'. All were inaccessible for Western marketing, and their politics was defined by Moscow. Rare visitors from the US or Western Europe were startled to see a grey world without advertising, poorly paved roads, and crumbling infrastructure. Economies relied, or at least tried to, on heavy industry and inefficient state-run agriculture.

This perception, as most stereotypes is a very long-lived one. It is all too easy to see the CEE region as a whole and lagging behind the developed world, now maybe without Russia. It is easy to overlook that most markets have started to develop in their own way, reflecting the specific mentality, traditions and aspirations of the individual societies.



Ostrogski Castle
Warsaw

New countries were formed in place of the former Soviet Union, Yugoslavia, and Czechoslovakia; several countries joined the European Union and others are still waiting. Some, like Ukraine, may never become members. There are only two things that all these markets really share: Strong economic growth (albeit interrupted here and there by a financial crisis) and a good share of communist-time nostalgia. You may know that France is different from Germany and both are different from Italy; but who can tell what makes Romania different from Hungary and from Poland?

Now, consider this:

- We speak different languages. Some are Slavic, some are not (like Hungarian or Romanian);
- We have different traditions;
- We have different religions;
- The countries were shaped by different historical events;
- Our cultural heritage is different;
- We eat different foods;
- We have different aspirations;
- We don't even all drink Coke!

CEE countries have been graded on dimensions developed by Geert Hofstede of Maastricht University:

- In Slovakia and Romania power and social status are important values that are frequently represented in advertising. Wealthy people like to show their social position and the less successful ones accept this;
- Slovakia is also high on masculinity but Romania is not – In the latter country, values like caring for other people and emotional relationship are highly appreciated. Romania is really a 'collective' society, where people define themselves in relation to others. This strongly influences behaviour such as in clothing and attitudes towards cosmetics;
- Among six countries Poland has the highest Uncertainty Avoidance score. This makes Polish consumers likely to respond to specific kinds of communication. As consumers, they are more conservative than others;
- The Czech Republic does not stand out on any of these dimensions but the striking observation is that it is so much different from Slovakia. This helps us to understand why the two countries decided to divorce! Today, Czech society is more similar to Germany than to its neighbours;
- Last but not least, each CEE country has its own brand heritage. Some brands are so strong and beloved that no Western corporation can beat them, like Kofola in the Czech Republic. Others have found new creative ways to win local consumers after being taken over (like Dacia in Romania, which was acquired by Renault).

Advice for marketers

So what can a marketer do if she or he wants to win CEE consumers? Most of these markets are too small to create separate brands, products and different communication. One solution is to give your brand local 'touch' so that the brand is recognised by every society as their own. You definitely have to run taste tests in every country separately if your product is edible. In some categories, however, a uniform approach works well (e.g., painkillers). Therefore the advice is the same as ever: Study your consumers' behaviour and attitudes, try to understand their needs – **Do serious market research!**

Agnieszka Gornicka,
Inquiry, Warsaw
*Agnieszka is a speaker at the
AIMRI Krakow conference
on 20 June 2008*



Biggest online research event in Europe

GOR Conference in Hamburg

The 10th **General Online Research (GOR)** conference 2008, run by the German Society for Online Research (GDOF), took place at the University of Hamburg, Germany, from the 10th to the 12th of March 2008. The GOR conference is one of the activities supported by GDOF in order to enhance and improve the quality of online research.

With an attendance of over 350 people (Students, academics and market researchers), GOR 2008 claims to be the biggest event of its kind in Europe.

'Difficult to reach' target groups

The internet has allowed the market research industry to develop new methodologies and tools, in addition to increased access to target groups which would otherwise be difficult to reach. Today we can already look back on many years experience in putting questionnaires online, conducting our first online groups (NB: Take care to recruit only those respondents with >56K modems!) and developing blogs, online panels, bulletin boards and communities – Now we are able to start investigating the possibilities which Web 2.0 (a new techno-cultural phenomenon) offers us.

During this time, we have witnessed first hand the evolution in measurement and evaluation, in addition to the changes in respondents and ourselves as market researchers. Our research design in the online environment becomes increasingly more advanced – Both in terms of the tools made available to us and what our respondents have access to and are able to use with minimum effort.

Opening doors for researchers

The internet has opened doors for researchers, and as online research has moved from a text-based to a graphically-based interactive research technique, our respondents are increasingly open to sharing their opinions and experiences – If not to us directly, then to the world as a whole, as online communities (e.g. Second Life), Business/Personal Networks (e.g. LinkedIn, Xing & mrga) and blogs become increasingly present in our daily lives.

Presenting their experience, experiments and areas of growth in online market research, a number of leading institutes and hardware/software developers discussed in Hamburg a wide range of topics, covering methodologies,

data collection tools and trends, relevant to both today's online market research industry and the public (our respondents).

'Hot topics' presented included the role of Web 2.0 both now and in the future, access panels, online social networks, internet and mobile communication and the changing nature of the respondents. Several presentations of a methodological nature looked at survey and questionnaire design and the effectiveness of different presentations and visualisations of the same questions, and other method effects in online data collection.

A panel of specialists discussed drawbacks to online market research, in particular:

- The price deterioration in online access panels;
- Do-it-yourself or outsourcing: Do institutes lose work because of online research?
- Which high quality research projects can be provided by online surveys – and which not?



**Binnenalster
Hamburg**

These panel discussions were moderated by Holgar Geißler (Psychonomics AG).

Of particular interest was the question raised (and not for the first time, I believe!) by Andrea Gadeib (Dialego AG, Germany): We all claim to offer better quality, when our prices are higher than others, but how is that quality defined and controlled? To which, the panel had no response...

On the whole, as the majority of presentations were from Universities, the conference was very 'academic', rather than market research focussed.

GOR 2009 will take place in Vienna.



Cathrene Rowell
(consultant) Northwich, UK
see page 5

New members

ADVISE Ad & Media

Advise is a qualitative & quantitative market researcher. Combining seriousness, professionalism, personalised attention and permanent guidance to our clients, we introduce a new way of working, not only as testers but as partners, operating together throughout the whole process to meet every objective.

Our experience allows us to solve almost any marketing questions using our research tools, but we believe that the greater added values of an agency is given by their people.

Adolfo Gaffoglio, (Manager Director of Advise) was account manager of Ipsos Argentina, he directed studies for Visa, Nokia, Reckitt Benckiser, P&G, Nestlé Purina, SC Johnson, Renault and many more in Latin America.

Our team, has designed, processed, directed, and analysed hundreds of studies for clients of diverse categories. We are proud of having felt useful and to have been valued by all our partners.

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Blauw Research UK

Blauw Research is an independent market research agency that wishes to be the best but not necessarily the largest of its kind. Our approach is based on a commitment to using our expertise, experience and ingenuity to work with our clients with a view to achieving innovative research solutions and marketing intelligence.

Blauw Research acts as a partner to its clients. We are always looking for new ways of achieving the best approach, either by using online data collection, dedicated panels, digital information distribution or new qualitative and quantitative models and methods or simply by adopting a creative and original approach to the problem. But our underlying strength is always our no-nonsense, down-to-earth approach of going straight for the best solution. This approach appeals to clients, who regard Blauw Research as a pleasant and reliable partner. Started in 1993 the firm has quickly become one of the prominent market research agencies and the company now has a workforce of over 130 researchers in Europe.

Blauw Research has offices in London, Rotterdam, Amersfoort and Nürnberg, and conducts a wide range of studies from small scale local projects to large multinational projects.

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Research@Cathrene.com

Research@Cathrene.com, formed in July 2007 by Cathrene Rowell, offers two primary areas of expertise. Firstly, with a panel of over nine million UK residents, we can offer specialist panel building in the UK, and in addition in other European countries.

Secondly, we work closely with overseas tourist authorities and bodies interested in attracting and researching British tourists by researching and analysing their plans and requirements in terms of travel and tourism.

With an in-house translation company, and a team of dedicated freelancers (all specialists in their fields) a wide variety of market research methodologies can be conducted on a competitive budget, on an international scale.

See also page 4 - Online Research Conference in Hamburg

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OMI - Online Market Intelligence

Online Market Intelligence (OMI) provides high quality online fieldwork in Russia, Ukraine, Belarus and Kazakhstan. With OMI online panels you can access over 150k consumers and 6000 IT professionals recruited from a wide variety of local Web-portals and IT-specific sites.

Why choose OMI:

- Panels are in full compliance with ESOMAR, CASRO and EU Safe Harbor standards for online research;
- Clients receive real-time fieldwork reporting through online portals;
- Deep profiling and accurate targeting are available;
- Advanced quality control procedures have been implemented, including regular removal of fraudulent panelists!
- Response rates are as high as 50%.

In addition OMI provides:

- We have different aspirations;
- Questionnaire translation and localization;
- CATI and Phone-to-Web data collection;
- Data processing, coding and cross-tabulation;
- Recruiting your proprietary panels in Russia and CIS countries.

OMI - Online Mark Int.

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AIMRI in Paris - further report

The last AIMRI meeting in Paris was held on October 12th 2007. The Hotel de Castiglione is situated in one of Paris' most charming quarters. Next to the Place de la Concorde and La Madeleine the hotel offered an impressive setting for an exciting **AIMRI** event - Convincing by the rich diversity of different subjects. under the main theme "**Global trends in the 21st Century**" The speeches were accompanied by lively and inspiring discussions about this subject. This is the second part of the report by **Noëllie Büsselberg**.



Palais de Chaillot

EX.TEN.SO

With EX.TEN.SO **Jacques-Pierre Mariot from ACME Consultants** introduced a tool, which allows us to get to know the world of tomorrow with its designs for life, expectations and new patterns of behaviour. To get to these astonishing results EX.TEN.SO is based on classical psychology cognition and on the cooperation of experts, insiders and decision makers, who already know a lot about the trends in their field of expertise. The tool divides our environment of today into 16 socio-economic territories and depending on the research question experts in these fields are asked to elaborate future-oriented scenarios. With all this analysis and concentrated knowledge the future has already begun with **EX.TEN.SO**.



Place des Vosges

Beyond the developed world

After an excellent lunch with very entertaining conversation, the meeting continued with **Allen Cooper's** contribution about media utilisation in the developed world. I must admit that I had not thought about the technical, media and communicative opening of the developing countries so far.

That is why Allen's remarks were all the more interesting to me. I was especially surprised by the large amount of studies

InterMedia has conducted regarding this topic. Since we had heard about problems in "normal, international" fieldwork, we could easily imagine what kind of challenge it must be to do international fieldwork beyond the developed world.

Modernisation in the developing world

One has to look at modernisation in the developing world with a high level of differentiation: There are important differences between countries in Africa and Asia, but in general one can say that the distribution of modern techniques such as internet and mobile phones clearly depends on the country's urbanisation. That is why you can easily find internet cafés in Kabul, but you will encounter difficulties in reaching an inhabitant of the Hindu Kush by cell phone. But, nevertheless, the accessibility of information is getting easier all over the world and now it is all about taking advantage of this development.

Unfortunately, this interesting day could not be closed with **David Young's** speech about "**Market research in a virtual world**". We all had looked forward to it. But thanks to all of you who took part in lively discussions about the other speeches the extra time was filled in a very agreeable manner.

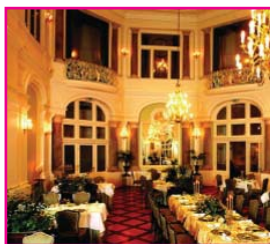
Noëllie Büsselberg
MAIX, Aachen, Germany

New markets to the East

The summer **AIMRI** meeting will be in the beautiful Polish city of Krakow on Friday 20 June 2008. The subject will be:

"Research in Central & Eastern Europe"

For this region we will examine the retail scene, IT progress & markets and the organisation of market research together with economic prospects, and research techniques in use.



Conference venue

The conference will be in the Grand Hotel - The best 5 star hotel in the old city, over a century old but lovingly restored.

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

The business information revolution

AIMRI meets in Malaga

Several attendees gathered in the AC Malaga Palacio hotel lobby on 28 February 2008, the evening before the conference. The relaxing atmosphere allowed fellow **AIMRI** members to reconnect and share travel stories. To the authors of this report, these conversations helped us to better understand cultural differences and underscored the value of the relationships among **AIMRI** members.

Demand for business intelligence is increasing

Gerry Stacey opened the conference with a review of the day's agenda. With no waste of time, **Sam Perkins of SIS International Research** was introduced as our first speaker. Sam challenged the group to think about how collecting and analysing competitive and business intelligence might impact our market research businesses. He suggested that demand for business intelligence is increasing and market research firms may be well positioned to provide this service. After all, we are in the business of providing information and business intelligence may be a natural extension of what we are already doing.



Malaga

Revealing hidden opinions

Our next presenter, **Herbert Höckel** discussed Web2.0 and blogs as a new way to collect and analyse opinions. From his perspective, it's a way for his business (and perhaps other similar businesses) to engage respondents. Rather than turning away panel members when a survey is closed, his approach is to invite these individuals to participate in a topic blog. He demonstrated **mo'web's** blog analysis tool (BLOGiQ), which reveals hidden opinions about brands, products and topics.

Post coffee break, **Adam Gac from Healthcare Landscape** introduced ResBlogs. Using respondent-generated content is an exciting way to extend the power of MR and ResBlog is aimed at just that Getting into patients' heads and capitalizing on their inherent passion about a topic. He described the many benefits to the client this blogging approach has, and detailed items we as researchers need to keep in mind.



Another view of Malaga

Pete Cape of Survey Sampling International, also the boss of Veritas Restaurant (see what you learn by attending an **AIMRI** meeting?), posed this question, "Does social media

research need to be done online?" The answer: Maybe yes, maybe no, but not if you don't want to. If you want to, be sure to ask the right people the right questions and make sure you understand their answers. This may not be considered "perfect" research and may require you to accept "good enough" research.

The charming **Alberto Rojas** wrapped up our morning sessions by detailing the research SOPDE Malaga conducts on behalf of the Tourist Board of Costa del Sol. The Board relies on the information gleaned from this project to track tourism trends and plan promotional activities. Alberto shared with us the challenges of coordinating in-person interviewers in various locations throughout the region who are collecting data via PDAs in multiple languages.

Generating ideas

After a delightful lunch and walk in the sun, **Jack Semler of Readex Research** started our afternoon by explaining how his firm was affected by a rather significant drop in planned revenue without corresponding cuts in expenses. A spirited discussion followed, with the group generating ideas on how to handle such things as employee communications, budget adjustments and bonus payments during more difficult times.

The gala dinner is always wonderful and Malaga was no exception. After being transported high up the hillside to the Parador Malaga, we gazed at the spectacular view of the city while enjoying pre-dinner appetisers, cocktails, and conversation. Dinner greeted us with a bountiful array of tapas, a beautiful sea bass, and assorted desserts with after-dinner drinks. Upon return to the hotel, many of us gave in to the temptation to venture out on foot into the city's streets and experience its night life. All in all, a delightful meeting in an inspiring host city.



Theresa Cabak,
Readex Research



Jack Semler,
Readex

Exploding retail market in Poland

During the last few years Poland experienced an economic boom including an increase in consumption. In 2006 retail sales grew up by over seven per cent and in 2007 the fifty top retailers reported over 20 per cent growth in their businesses. The annual value of the total retail market was over €130 billion.

Highly fragmented

The retail sector in Poland is highly fragmented in terms of the number of outlets. According to official statistics at the end of 2006 there were 395 thousand different types of outlets. Approximately 120 thousand were general food stores, usually small sized, independent ones. Less than two per cent of all the outlets exceed 400 sqm sales area, However hypermarkets and big supermarkets accounted for half of fmcg sales.

This structure is the effect of natural changes of the market after the decline of communism. In the old times of the centrally planned economy there were not more than 200 thousand outlets across the country. Shortly after the market opened up at the beginning of the 90's this number doubled. By 1995 over 400 thousand Poles operated their own outlets!

Foreign investors

This was the time foreign investors entered the market. One of the first hypermarkets was Auchan in Piaseczno (Warsaw agglomeration) opened in 1995. The other new players were Carrefour, Geant, Leclerc, Real and Tesco, accompanied by non-food chains. Poles liked to shop in new chain stores, contributing to their fast growth. Nowadays there are over 400 hypermarkets in Poland, three quarters of them selling fmcg, and the remaining quarter specialised at DIY and electronics. During recent months the big players sought new growth areas by entering smaller formats (Carrefour, Tesco) or considering sales of more and more varied goods and services, such as mobile or insurance.

Still seeking new growth areas

Today the biggest retail operator on the Polish market is the German Metro Group, with turnover at €4.5 billion and 94 hypermarkets (fmcg – Makro Cash&Carry, Real, electronics - Media Markt, Saturn). The second biggest is Portuguese Jeronimo Martins operating 1050 discount stores named Biedronka, with turnover at €2.5 billion, followed by British Tesco with sales at €2.3 billion and 290 outlets of different sizes. The biggest Polish players are the Eldorado group and the Lewiatan franchise network.

Big towns are fairly saturated with modern trade space, although new ideas offering a good concept can still do well. An example is Zlote Tarasy (Golden Terraces), a

new mall opened in 2007 in the heart of Warsaw, which had over 13 million of visitors in the first year of operating. However, the most dynamic growth is in smaller towns.



Arkadia - shopping mall in Warsaw

Two new shopping malls

Let's take a local perspective. Bialystok - A town in East Poland with less than 300,000 inhabitants. Of big outlets it had only one Auchan and one Makro Cash&Carry by 2006. There was no big, modern shopping mall and

only two cinemas operated there. In 2007 there opened two shopping malls with 150 outlets (fmcg hypermarkets, fashion, electronics, services etc.) and a modern eight-screen cinema. By the end of 2008 two other malls will appear and Auchan which is defending it's market position will open a second hypermarket!

What a revolution!

Maciej Bartminski
Market Side, Warsaw
*Maciej is a speaker at the
AIMRI Krakow conference
on 20 June 2008*

