

Another outstanding conference in Chepstow

The sun shone for some of the time, and many first-timers enjoyed the delights of the St Pierre hotel and its tranquil surroundings, with its resident flock of ducks, swans and cygnets.



Delegates had an extremely varied three days at the conference in May and departed stimulated and buzzing with new ideas. The quality of papers and workshops were high, the social activities did not disappoint and the introduction of golf coaching for beginners this year (courtesy of *Insight Research Group*) was a great success. As one delegate said:

"Very well organised and friendly conference".

Three awards will be given to speakers at conference (for best paper, content, presentation and innovation) and are to be presented at the BIG summer party on board HMS Belfast on 23rd July (see booking details on right).

£770.00 was collected for the MRBA at the Conference Dinner raffle on Thursday and thanks go to all delegates and committee who were kind enough to provide a wide range of prizes.

Don't forget the quiz on the back page and the chance to win a £30.00 gift card, courtesy of the sponsor *Strictly Financial*, specialists in financial services research. Perhaps the mix of sunshine and showers will stimulate the thought processes!

Pene Healey, Editor

BIG summer party and 2009 conference awards on HMS Belfast

Thursday 23rd July, 6.30 - 11pm

There are certain occasions which demand special treatment, the choice of venue is crucial and seldom will you find one as unique as HMS Belfast.

She was launched in March 1938 and served throughout the Second World War, playing a leading role in the Battle of North Cape and in the Normandy Landings. She later supported UN forces in Korea and remained in service until 1965. In 1971 she was saved for the nation as a unique reminder of Britain's Naval Heritage and is the only surviving example of the great fleets of big gun-armoured warships built for the Royal Navy in the first half of the twentieth century. HMS Belfast is now owned and managed by the Imperial War Museum and is a popular tourist attraction permanently moored between London Bridge and



Tower Bridge (.Morgan's Lane, Tooley Street, London SE1 2JH).

The 2009 speaker awards will be presented at 8:30pm and as well as the opportunity to network, food and drink are included in the price - £30.00 for BIG members and £35.00 for non-members (Price includes VAT).

Tickets are still available and you can download a booking form from the www.b2bresearch.org website, and post or email to: **Fiona Roberts-Miller**, BIG Secretariat, c/o PO Box 104, Dorking RH5 6YN - em: fiona@roberts-miller.co.uk

MRS/BIG Award for Business-to-Business Research

The MRS/BIG Award for Business-to-Business Research is designed to recognise outstanding research specifically in the business-to-business arena.

The judges are looking for papers that demonstrate both the innovative nature of the work and the demonstrable outcomes. The paper which best demonstrates research quality and vision (methodological or

interpretative) and its effectiveness/application in the business-to-business sector will win the award. The winner will be announced at the Research Awards Dinner on 14 December 2009 in London.

Papers presented at Research 2009, BIG Conference 2009, BIG Forum or published in the *IJMR (International Journal of Market Research)* are automatically considered for the Award. Papers may also be submitted specifically

for this award. Please visit the MRS website at <http://www.mrs.org.uk/awards/2009/big.htm> for more information.

The closing date is 31 July 2009.

News from the Chair

Summer blues



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I'm writing this before heading off for a long weekend camping in Swanage with the kids. Naturally the heatwave has chosen this moment to give way to the more traditional wind and heavy rain that I associate with UK camping weekends.

So the summer holidays are almost upon us and we're half way through the year. Time to take stock and work out what the second half of the year is going to bring.

Business-wise the first half of the year was itself a 'game of two halves.' Many b2b researchers I've spoken to had a busy first calendar quarter but work appears to have dried up somewhat in April as new (reduced) budgets kick in. My impression is that suppliers of research services are fighting each other over 60% of the money available in 2008.

Predictions for the rest of 2009 are not positive, with most industry commentators anticipating growth only in 2010 (and possibly half way through 2010). Certainly the economic crisis understandably dominated discussion at the BIG Conference in May, with many clients speaking of looking for more cost-effective ways of getting information and insight, such as online surveys or desk research.

Some positive news

However there were some positives highlighted at the conference. For a start the number of delegates attending

held up, with both the client-side and supplier-side well represented. There is still, clearly, some money being spent on research, but it is more important than ever to demonstrate return on investment. **Jonathan Fletcher** of *Illuminas* gave an excellent paper at the Conference on this very subject. Given the current economic climate it is now, more than ever, crucial to justify investment on research in terms that the MD and FD of the client company will understand i.e. cash. Jonathan had a pretty good stab at doing just that in terms of risk management and product development.

As well as a very successful conference (reported elsewhere in this newsletter), BIG is pleased to have completed the BIG Buyers Guide and the current BIG Forum programme came to an end on June 2nd with with another of our 'Client Loves and Hates' sessions, also reported elsewhere. The BIG Forum sub-committee is currently working on the new programme, to start in September, so keep an eye out for details of that.

BIG AGM and changes to the BIG committee

The June 2nd Forum was preceded by the BIG AGM. We had considerable expenditure in 2008 due to the redevelopment of the website (already looking a sound investment with potential to be even more useful in future), however our finances in 2009 are looking pretty healthy thanks to the income from the BIG Guide. At the AGM **Clair Labrum, Gailynn**

Nicks and Nick Thomas

stepped down from the committee. Many thanks for their efforts over the years and I'm sure they're not going to disappear from the BIG scene.

They have been replaced on the committee by three newcomers, and we welcome **Sarah Penny, Ben Hogg** and **Pravin Shekar** to the committee. We will be meeting up over the summer to allocate roles and responsibilities within the committee – I should be able to report on these in the next newsletter.

BIG summer party

The final event before the summer holiday is the BIG Summer Party and Conference Awards for 2009, which will be held on Thursday 23rd July on the deck of HMS Belfast. I'm sure that will be a great evening.

It only remains to wish you all a relaxing summer. The next twelve months are likely to be challenging and we'll need all the energy we can muster as the second half of the year kicks off. I know I'll be raring to go after a summer under canvas.

As usual check out the new website (www.b2bresearch.org) for more information on BIG activities.

Trevor Wilkinson, Chair of the Business Intelligence Group
020 8538 0133
trevor@purplemr.co.uk

Diary Dates

BIG conference awards & summer party

HMS Belfast, Tooley Street, London, 23 July 2009

ESOMAR Congress

Montreux, 15 - 18 September 2009

Royal Statistical Society International Conference

Edinburgh, 7 November 2009

Research Awards 2009

14 December 2009

BIG Times

BIGtimes is published four times a year (January, April, July & October). Copy date: Editorial and advertising copy by 14th of preceding month.

Advertisement Rates

All advertisements are printed in full colour

- Front page banner £180
- Half Page £160.
- Quarter Page £105.

If booking run of 4 fifth ad is free.

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One ninth £65.00

Contact Pene Healey for further information. All comments, suggestions and articles should also be addressed to the Editor - **Pene Healey** on: 020 8864 1834 or by e-mail: healeypm@btinternet.com

Welcome to the new BIG committee members



Sarah Penny

Sarah has worked in recruitment since 1999 – she spent a few years managing graduate roles before specialising in market research recruitment. Sarah joined Hasson Associates in February 2008 and is now an Associate Partner. Well known within the industry as an insightful and determined recruiter she is passionate about the research industry and helping people to build careers. If she wasn't a supplier to the industry she would probably be a researcher.



Ben Hogg

After reading law and languages at the University of West England, Ben spent five years as Managing Director and owner of youth marketing agency Out of Hand. Tired of being mocked by his hometown friends from Essex for developing a "brizzle twang" to his estuary accent, Ben moved to London and took his first online research job at NetValue in 1999, which was acquired by Nielsen two years later.

Ben led the business development teams at Nielsen/NetRatings (now Nielsen Online) with a focus on how people used the internet, especially whilst at work. Three years ago, he moved to set up the European Sales operation of e-Rewards, a B2B and affluent consumer online panel company, and is proud to say that the team in London has grown from 1 to 27!



Pravin Shekar

Pravin founded Dexterity Business Analysts, MRKPO and "The Social Catalyst", a social-marketing organization. He is responsible for the International expansion of the Dexterity group and his experience and focus is on taking concepts from ideation to stability, Global expansion and International Marketing. He lives in Chennai, India.

Prior to this Pravin worked on assignments for IMS Health, Dun & Bradstreet & ACNielsen. He has a strong understanding of the International Market Dynamics and is well acquainted with European languages and culture.

Pravin is the Country Representative (India) for ESOMAR, a global Research Association; an associate member of the Council of American Research Organizations (CASRO), Business Intelligence Group (BIG) and the Market Research Society of India (MRSI). Pravin is a part of ESOMAR's Project Team to develop **Guidelines for conducting Mobile Research**.

An acclaimed public speaker with strong communication skills, Pravin has presented technical papers for various associations (ESOMAR, MRSS, BIG) at Berlin, Paris, Rome, London and Singapore.

New Members

A warm welcome is extended to five new or returning members of BIG.

- Amy Baker**, Acumen Fieldwork
- Clive Brand**, Brand Research & Development LLP
- Nick Rubashov**, Makrotest
- Paul Williams**, E-Tabs Ltd
- Gavin Yeulet**, Clear Market Intelligence Ltd



Conference 2009 reviews

This year's BIG Conference was packed with good sessions – keynotes, papers, discussions and interactive workshops.

"I like the increase in debates and forums as opposed to straight presentations - more interesting, engaging and interactive".

"Good papers, good venue, good opportunities to network".

Below is a flavour of the topics covered.

Research: the decision-making context

Dr David Smith, DVL Smith Neuroscientists tell us that 'in a straight choice between emotion and reason, emotion wins': so exactly how do business decision-makers now want us to present our market research evidence?

Caroline Florence, Royal Mail The benefits and pitfalls of combining research with financial data

Phil Rance, Research Now How research is used in corporate decision making

A full house was in evidence for the opening session of the BIG Conference 2009. In a session chaired by **Kathy Hurst, Dr David Smith** gave the keynote speech. He took us back to the 1960s, reminding us of our rational (and unemotional) beginnings.



Kathy, David, Caroline & Phil

There is now evidence to prove we can measure empathy so, as David said, we have won the debate on emotion, but we need to see the big picture and bring it all together for our clients. He gave us examples of how we can do this - such as telling an anti-story and challenging the wisdom - to cut through the data and frame the results in a business context.

Next was **Caroline Florence** who gave an interesting paper on combining research and financial data, asking the question 'is it worth it'? On balance, Caroline answered 'yes' to this question. When Royal Mail overlaid customer survey data onto spend data, they found no causal relationship which led to an overhaul of its CSI study; something for us researchers to bear in mind when designing questionnaires is that there may be a subsequent need to link the survey data to financial data.

The final speaker in this session was **Phil Rance** of Research Now, although his paper was delivered wearing the hats of his previous employers – the AA and Bradford and Bingley. Like the two papers before him, Phil delivered an insightful and thought-provoking paper on how research is used in the decision-making process.

In summary, there is a resounding need for our industry to improve our story-telling; framing the problem and delivering actionable recommendations in a business context.

Ali Pugh
Jigsaw Research.

The economic climate – the client perspective

The next session, chaired by **Ruth McNeil**, was a Q&A session discussing the client view on the current economic woes.

The panel members were **Cathy Bickham** from BT, **Dan Young** from Legal & General and **Chris Branford** from Associated News.



Ruth, Dan, Cathy & Chris

Cathy started the discussion by telling how the client MR industry is being looked at under a much higher powered microscope within their businesses. Senior managers in client businesses are now looking at how market research can help their business through the current economic storm and this is affecting the kinds of market research they

are now being asked to carry out. This view was backed up by Dan, who told how research spend needed to be justified to meet strategic goals and economic ends. Chris added that there were many more questions coming down from the board now, which needed to be answered fast; meaning that the quick and cheap methods were starting to win out.

Then the panel discussed what clients want agencies to do differently now, to countermand the current climate.

Dan began by saying there agencies need to tell a story, it needs to be strong and it needs to be capable of ensuring positive change. From both Cathy and Chris's points of view, good results, PowerPoint or otherwise, can travel a huge distance within a client organisation and can travel for a long time too, right up to that elusive CEO or board level. However to get this kind of traction in the research that agencies do, we need to make it quick, simple and we

need to state the actions that need to be taken up front.

Other ways to make that difference are to:

- embrace technology - use the web, use twitter, use handhelds, use pen and pencil!
- be bold - think outside of that traditional PPT, think different, challenge and push back to get the business
- train our grads up early (or at least earlier than we do now)
- make more use of desk research
- invest in bespoke panels

Overall, by investing in people, finding creative methods to answer questions (both internal and client facing), persuading stakeholders that new or different ways of working are as good or better and facing the fact that we need to be right first time, every time (no more fail fast, learn fast), we will be in a strong position when we come out the other side of the hurricane.

Aidan Winwood
Munro Global.

Conference Papers

Conference Papers 2007

A CD Rom of the papers from 2007 conference with its theme of **"Challenging the Status Quo"** is available in Acrobat format for £31.00 (incl of VAT & P&P).



Conference Papers 2008

A CD Rom of the papers from last year's conference with its theme of **"B2B Marketing: the issues and the practice"** is available in Acrobat format for £31.00 (incl of VAT & P&P).



Conference Papers 2009

A CD Rom of the papers from this year's conference with its theme of **"B2B Research: New Dimensions"** is available in Acrobat format for £31.00 (incl of VAT & P&P).



For copies of either or both please contact **Pene Healey** on 020 8864 1834 or e-mail healeypm@btinternet.com

Please ensure that you stipulate which conference papers you want.

BIG Conference Online

Pay a visit to the BIG Conference website www.bigconference.org



Changing business models



Sinéad, Richard, Sara, Keith & Andy

Iphones, BlackBerries and dongles – a few years ago, would any of us had any concept of what these things might be, let alone the impact they would have on our working lives? This after-lunch session, chaired by Sinéad Jefferies, gave us three different perspectives on the changing world of work.

First on stage were Keith Bailey from Nokia and Andy Dexter from Truth, sharing some of the insights they've been uncovering in a global

study on 'The Future of Work'. As Keith explained, Nokia's handsets facilitate all aspects of business, therefore it's key to their future success that they understand how they are increasingly integrating into people's work and home lives, and how that is continually evolving.

Keith and Andy shared with us their framework for the project, speaking to people from end users through to technology experts. One of the trends they identified was 'nomadism' – those workers who are entirely self-sufficient and can take their working life with them wherever they go – be that an airport, a train or Starbucks. They also looked at the importance of the human element – the need for basic human interaction.

Keith was just summing up using familiar words from the telecommunications industry – 'The future's bright....' when the lights went out and neatly punctuated the end of the presentation!

The next speaker was Charterhouse Research's Sara McFadzean looking at 'Virtual Reality' – how businesses are changing the way they operate. Sara had a particular focus on very

small businesses and how the virtual office is opening up new opportunities for them – and presenting more research challenges for us.

In looking at the challenges and opportunities of a virtual business life Sara shared with us some videos featuring those who have experienced this first hand, and also business services providers who are benefitting from supporting this growing trend. We clearly have some thinking to do to ensure we provide appropriate solutions to researching the virtual business audience.

Gamely taking on the challenge of presenting the last paper was Richard Hepburn from Munro Global. As well as highlighting a spectrum of different typologies of remote workers, Richard explained the importance of documenting clear ways of working for remote workers, and thinking about the security issues of someone remotely logging in and working with client data, while not operating directly on a secure office network.

Sinéad Jefferies,
Royal Mail

New techniques



Richard, Catherine, Neil, Nick & Matt

The first session on Friday morning looked at different aspects of the impact of new techniques on B2B research.

Matt Burn (ICM Research) and Nick Bassett (Vodafone) told us about Lions' Lair – an innovative project which had involved marketing teams from Vodafone pitching their ideas to a panel of SME customers in a similar fashion to a similarly named BBC TV programme. The challenge was to help Vodafone understand

what it felt like to be a small business. The project involved workshops, senior stakeholder interviews, 'speed dating' sessions with those who support small businesses and site visits by Vodafone marketers.

The final stage consisted of Vodafone client teams pitching their ideas for 10-15 minutes to a panel of small businesses with, finally, both the teams and the 'Lions' interviewed about their experience.

The next paper, from Neil Swan of RS Consulting discussed how we are adapting in a B2B context to the things which are happening in the B2B digital space. He talked about the issues which might be holding us back and the solutions – for example participant recruitment which is being overcome by the increase in specialist B2B panels. Other areas we should be looking at are users' forums and online communities as a starting point for accelerated learning.

Finally, Catherine Shovlin from Synthetron talked about social brainstorming, or how to harness the positives from water cooler discussions – an environment in which it's informal, easy to chat but without the negatives associated with water coolers. Catherine explained how social brainstorming groups work with participants connecting to a moderator but also to a wider group (with between ten and a thousand participants). Although connected to other groups it feels like a small conversation.

If a good idea starts, it migrates around the group and the best ideas go a long way.

Three quite different papers but all full of new ideas and a good deal to think about.

Alison Lawrence,
Accent

Maximising the value of research



The fifth session of the conference, chaired by Pene Healey, presented two very different papers under the broad heading of 'maximising the value of research.'

The first paper 'Can we justify the ROI of market research?' presented by Jonathan Fletcher of Illuminas, was (as the title suggests) more about demonstrating the value of research than maximizing it. However, this was a very welcome attempt to attach a monetary value to the contribution of research. Given the current economic climate it is now, more than ever, crucial to justify investment on research in terms

that the MD and FD of the client company will understand i.e. cash. Jonathan had a pretty good stab at doing just that.



Jonathan Fletcher

Jonathan touched on a number of difficulties with demonstrating the ROI of research. These include isolating the impact and contribution of research from all the other activities within a business, such as marketing, sales and NPD, that might contribute to profit. There are also many different kinds of research: although research associated with NPD is a bit more

straightforward in terms of demonstrating the contribution of research, other kinds of research such as customer satisfaction research and continuous brand tracking are not so clear cut. Moreover it is difficult to quantify the additional knowledge provided by a research project from the knowledge of a market that already existed within a client company. Another problem was that researchers traditionally have not tended to speak the language of cash.

Jonathan's argument was that a monetary value can be put on research in two specific ways. Firstly using research as a risk reduction tool (guiding clients on what *not* to do as much as what to do) can link that research to a specific sum of money in terms of expenditure or losses avoided. Secondly research can claim a share of profits for the identification and realisation of opportunities for new or revamped products or services. By this rationale research would claim a royalty, perhaps 25%, for its contribution in this area.

This was an interesting and useful attempt to put a monetary value on research - a bit of a holy grail for researchers.

The second paper in this session was 'Back to the future: the lost art of desk research,' presented by the co-author of the paper, **Michael Jaxa-Chamiec** of *FreshMinds* (Alistair Leathwood being laid low with a slipped disc).



Michael Jaxa-Chamiec

Among the general themes of the conference two stood out: one was the need to squeeze as much value out of research as possible from

research and the other was the search for more cost-effective ways of delivering insight. The previous day of the conference, for example, **Dan Young** of *Legal & General* had sung the praises of desk research in general (and *FreshMinds* in particular) as excellent means of achieving those aims. So the scene was set for Michael's talk on how desk research, broadly considered a lost art, should be reinvigorated for the new millennium.

Michael's 'Desk Research 2.0' certainly looked compelling. The main thrust of his argument was that recent developments, including more sophisticated search and analysis tools on the Internet and the rapid growth of user-generated content such as online forums, blogs and various social networks, have introduced a different kind of desk research, one that has started to blur the line between primary and secondary data.

There are challenges, of course, with issues around verifying the accuracy of information and trustworthiness of sources, and the practical issue of separating the wheat from a huge amount of chaff.

However, it's good to see someone championing desk research ('a good, old but slightly forgotten friend') as means of providing market data and insight within a modest budget. Desk research has long been a vital part of the b2b researcher's toolkit and any attempt to revitalize it has to be welcomed.

Trevor Wilkinson,
Purple Market Research

What will the future hold?



Nick, David, Danny & Tim

This was followed by the **BIG debate, chaired by Nick Coates of Promise, on what the future held for B2B research.**

Tim Britton of *YouGov* opened the debate by proposing 'Online' as the key directional force.

Tim presented his argument as a direct battle between online and telephone research, arguing that the increasing difficulty, both practical and economic, of identifying and eliciting participation from key business decision makers in telephone research opened the way for online panels.

Daniel Wain's lively proposition, 'Brand and Deliver', argued that attracting and retaining a talented workforce is the key to a bright future for market research. He insisted that, once a brand is established, and the talent enticed through the doors, the employer must deliver on that brand in order to retain and engage its people, and thereby its differentiation.

Dave Skelsey, of *Strictly Financial*, rounded off this session with the 'Economic Climate', giving a run-down on the ways in which economic factors affect the market research industry, which is a "secondary industry" relying on other sectors for its success. A brief summary of the situation painted a very bleak picture of the

recession as it is, and as it will continue. But the recession also presents opportunities for market research: a different sort of questioning can establish the relationship between demand and brand; agencies can add value through desk research and sweating data. Dave believes that certain areas of research, such as customer satisfaction studies and small scale qualitative work, have greater value and will therefore see growth in recession conditions.

Time being up, a quick show of hands decided that **Daniel Wain's** Employer Branding argument had been the most compelling, closing a varied and interesting debate, that gave plenty of fuel for further discourse over the blackberry smoothies that followed.

Sophia Munday

Marketing in challenging times

The closing session, chaired by **Phyllis Macfarlane, featured our keynote speaker Mark Stuart, Head of Research at The Chartered Institute of Marketing (CIM).**



Phyllis & Mark

Mark feels that the recession will go on for a year or two or even longer and then took a vote from the floor on who was optimistic about the recovery happening soon, and who was pessimistic. The Optimists won by a short head, but then MR does tend to come out of downturns early – so both parties could be right!

CIM's own research shows that companies that ring-fence their marketing spend in a recession,

or even increase it, tend to do better in the long-term, than companies that cut marketing expenditure.

CIM has identified six areas/reasons for maintaining marketing spend in difficult times.

1. Visibility

Reducing marketing spend reduces visibility and could indicate (to customers) that the business is vulnerable. After 9/11 the major airlines assumed that people would stop flying, and they retrenched. Ryanair took the opposite, counter-intuitive, view and developed an aggressive marketing strategy, which led to growth compared to competition.

2. We're on your side

Customer Centricity/affinity has never been more important than now. And empathy doesn't have to mean discounts. It means: Understand what customers really want. Can we learn from Tesco's Value, mid-range and Finest concept?

3. Differentiate

Keep track of competitor's strategies: but don't copy them – come up with something different.

4. Adapt

Even when the recovery comes: 'normal' won't be familiar. Businesses are down-sizing – offer a new service to down-size their IT function appropriately?

5. Don't count on Discounting

Price reductions today compromise price sensitivity in the future.

6. Technology

Develop an Opt-in culture, rather than an Opt-out one.

Mark rounded off with some key tips:

- Keep communicating
- Buyer psychology is complex
- Adapt (but ring-fence Marketing budget)
- Reconsider your core offering in the new climate
- Resist the temptation to cut prices
- Don't be afraid to innovate
- Think creatively not defensively
- Measure everything, (to prove [to senior management] that what you're doing is working)
- Don't slash the marketing budget

Phyllis Macfarlane,
GfK NOP

Workshops

There were three interactive workshops, which were well attended.

Seeing the wood and the trees - in the context of a landscape

Neil McPhee,
Nuance Research Limited

Slap bang in the middle of a conference which surrounded the delegates with the move from analogue to digital and from personal contact to cyber enabled, Neil McPhee gave us this timely reminder of the human being inside every business respondent.

With the aid of an impressive range of sound bites from, among others, Mission Impossible, The Simpsons and (everyone's favourite - Airplane) Neil put forward the argument that our persistence in treating the purchasing decisions of business respondents as wholly rational was wholly irrational. He also suggested that to use one respondent to reflect the opinions and buying intentions of

a large organization was just plain "silly" and "mistaking the wood for the trees", and that in assuming that these respondents can speak for their organizations with objectivity and lack of emotions we are falling back on techniques which are 25 – 50 years old.

To the strains of "Nothings Gonna Change Their World" Neil asked us to consider human decision making as an iceberg with 85% of all decisions (business and consumer alike) made by the unconscious mind. The unchangeable ones to whom he alluded were the clients who believe that in B2B research respondents don't respond to "soft" questions and that the empirical answer will be there if only we can ask the right questions. The image of the client who insisted on reading discussion guides word for word struck a cord with the experienced quality practitioners in the workshop and prompted a quick

round of agreeable moaning and client bashing.

Neil pointed out that these strict quantitative approaches were at odds with the clients need for "INSIGHT" and that in order to get the best out of a B2B respondent we had to create a context for our questioning, establish a rapport and put emotion and human values back into the interview. He also suggested that his wasn't the completely "low tech" approach of using an experienced interviewer to elicit good responses but that there were a whole raft of new techniques which could be employed including measuring peripheral vision and blink rate and analysing doodles left by respondents in focus groups.

A lively discussion ensued covering different methods for implementing discussion guides, different

approaches to the buying behaviour of different sizes of companies, whether qualitative researchers should ask any numeric questions, and the impact of culture on decision making. Budgets, of course, were also mentioned.

The workshop produced a list of factors to be taken into account when conducting B2B qualitative interviews; these included Multiple sampling; Big Company v SME; Question format; Timing; Culture; Client's needs and Human relationships.

This is a far too simplistic account of a much more complex and well produced research workshop.

Teresa Lynch,
Virtual Surveys

Stated Preference - the sky's the limit

Rob Sheldon,
Accent Research

In this excellent workshop we learnt that there are endless opportunities to apply this tried and trusted analysis tool in market research, and that it is a far more discriminating survey technique than simple importance scores. Rob has been using stated preference since the 1970s and has since conducted thousands of studies from £3k to £1m in value, testing a wide range of attributes at varying levels, reaching a record 110 variables in one major assignment. While Rob wouldn't recommend initiating a study with 100 different attributes to test, it can be done.

In fact, we heard that the technique is at its most effective when time is given at the development phase to refine the list of variables and levels at which they need to be tested. What is the trade off, relative to a customer's position and requirements? And what are the different levels at which they need to be assessed? Workshops with

the client to establish the variables and their respective levels are ideal and, if there is the time and money available, qualitative research up front can be very useful to ensure the survey focuses on the issues of importance. Rob suggested that 5-6 variables with 2-3 levels for each tends to work best for each separate exercise.

Once all the variables and their respective levels have been established, we need to formulate the options that the respondent will be presented with. A crucial requirement here, essential for the analysis to work, is to link exercises (if there are more than one) with a common variable, such as price. Well thought out routing in questionnaire design will ensure that the respondent is only asked to state their preference according to their pre-determined requirements. Responses to earlier questions can be used to limit the number of options you need to present them with and will also help not to bore or annoy respondents with repetitive or irrelevant options. Following these steps helps make the trade off analysis most effective, to give you results that are

actionable. You don't want to end up with one variable that dominates the utility scores, nor do you want to present findings to the client that will be impossible to implement. The workshop sparked many discussions around the potential benefits and possible pitfalls, such as if the preference options are not designed appropriately. We also learnt how the results could be used to calculate the likely monetary impact to the end client, applying functions of probability and value to the utility scores derived.

Today's software capabilities help to make trade off analysis far easier to apply compared to the dim and distant past when vast swathes of colour coded paper survey packs were necessary. Hand-held devices, online or telephone research all work very well, the latter option often being used in conjunction with electronic media to visually display the options to the respondent.

At the end of this highly interactive workshop, we were all left convinced of the wide potential of stated preference, how it can add value and insight to our client's research projects, and are now

armed with a clearer understanding of the statistics behind it. Stated preference is already well established in some industries such as health, utilities, transport and communications, particularly among the regulators who in some sectors insist that their regulated organisations incorporate it into their customer research programmes. But there remain a number of sectors where client side researchers rarely consider, or are even aware of, stated preference. Not doing so stifles the ability to design a survey that takes everything into consideration and gets the customer to make the trade offs so that we can derive the relative importance of these attributes, something a basic importance scale cannot do.

Vicky Whiting,
Continental Research

You can't know where to tap, if you don't know your customer's map!

Diana Tunney,
The Best Organisation

This was a really engaging workshop and was fully interactive with everyone inquisitive about the nuances of body language, the use of eyes in communicating a thousand words and how to truly understand a client's perspective from the language they use.

The Best Organisation specialises in finding patterns of customer thinking, language and behaviour across multiple research platforms, from quantitative data to qualitative verbatim transcripts, and through the art of non-verbal communication – something that many researchers have difficulty in incorporating into their concrete findings.

We were all asked to pair up to experience our natural tendency to use our eyes in a certain way to express a variety of factual or concocted accounts. This elicited some great conversations as it ensured we re-engaged with our real/true intentions as opposed to our verbal articulation/and the guises that words can create.

We were informed about people's tendency to:

1. Look up to their left when they remember things from memory, recalling things they have seen before. (Visual Remembered- VR)
2. Look up to their right when they are making things up. (Visual Constructed - VC)
3. Look to their left (ear level) when they are remembering something they have heard before. (Auditory Remembered - VR)
4. Look to their right (ear level) when they are making up

something that they haven't heard, e.g. The voice of Socrates. (Auditory Constructed - AC)

5. Look down and to their left – when you are having an internal conversation with yourself. (Auditory Digital - AD)
6. How when you relate things to feelings, sense or touch you tend to look at the part of your body that remembers/recreates that feeling. (Kinesthetic - K)

What was interesting was the fact that there were several quantitative researchers in the workshop, some of whom felt that feelings/observations/use of certain words or the lack of them etc were not enough to validate solid findings from a client's perspective. They would need to have quantification of results and then mesh this with the more NLP style to illicit formidable research findings.

In short the session was really refreshing and gave good insight into the multifaceted ways in which we communicate, however we all like to know that our gut instinct/visual observations are based on concrete findings and this is something that The Best Organisation holds in high regard. The Best Organisation model is based on ensuring intrinsic connections are made from disparate pieces of information which when collected and integrated are pertinent and impactful beyond the norm of quant or qual research alone. The primary connective 'tissue' in the model is the linguistic analysis – finding patterns in language used by customers that reveals not just their past behaviour but also accurately predicts their future actions.

Emy Rumble-Mettle,
Elizabeth Norman International



Emy was the lucky winner of the Magic Envelope (iPod) sponsored by GfK NOP. The iPod was presented by Phyllis Macfarlane, shown on the left.

BIG: Out and about on the social scene

A vintage BIG conference is often measured as much by the social scene as by what happens on the platform. 2009, by anyone's reckoning, was a corker in both regards. When more than 20 people turned up for the opening event, the BIG golf tournament (kindly sponsored by *Insight Research Group*), the tone was set for an epic struggle of man against the elements. Once again **Richard Collins** of *Confirmit UK* topped the leader board, but other delectable prizes were claimed by **Marcus Chillery** (also *Confirmit*), **Paul Williams** of *E-Tabs* (longest drive) and **Jon Darby** from *Touchstone* (best story in the bar).



But it wasn't all about the big swingers. Over in the driving range, a new event – beginner's golf – was also being played out. Twelve people turned up at the Driving Range on Wednesday afternoon for



a lesson with the golf professional. It was **Phil Rance** (*Research Now*) and **Vicky Whiting** (*Continental Research*) who walked away with the Best Beginners prizes – and we will be sure to repeat the beginners golf next year.

The first night Pub Quiz was led by the intrepid **Sinéad Jeffries** of *Royal Mail*, who had concocted a fiendish blend of Dingbats, British Olympians and other assorted trivia. One team – the Sangiovese Dogs – blew away the field. Having sensibly left aceing the Dingbats round to the Dogs, the Blonde Bombshells snatched the best name prize from some fierce competition.

On the 14th May the weather was downright horrible. Even so a few stalwarts played in the annual tennis tournament sponsored by *Confirmit UK*, with **Paul Williams** winning the competition overall, with **Damon Thomas** as runner up. **Pene Healey** won the ladies competition.

This year's less racket-obsessed delegates were given a parallel choice of table tennis or a range of everyone's favourite boardgames in the bar, from *Downfall* to *Jenga*, that we dubbed *Tiddly Tiddlywinks*. And what better way to prepare for the conference's social epicentre, the Thursday night dinner, which this year had the four course meal kindly sponsored by *Acumen Fieldwork* accompanied by wine courtesy of E-Rewards. Few if any managed to defeat the copious (and delicious) chocolate pudding which completed several hours of eating, chit-chat and general merry-making.



This year's MRBA raffle raised a fantastic £770.00 and we had 21 donated prizes ranging from champagne to a golf day for two via champagne, white burgundy, wine, pink champagne, oh yes ... and more champagne, not to mention goodies from Harvey Nichols and Weightwatchers, Amazon vouchers, Bamz shoe inserts, Nokia mobile phone, soap, iPod, dinner for two, &

psychometric sessions. Thanks to all who donated so generously.



The end of the night brought a sudden realisation that dawn was catching up on the last sitting and the last brave delegates crept back to their rooms to prepare for Day 2. The inspired Blackberry break smoothies after Friday lunch were a welcome treat before **Mark Stuart**, from *The Chartered Institute of Marketing*, rounded off the conference with its focus on looking at B2B research from a broader perspective. His recommendations were that marketing spend should not be slashed but spent wisely to help companies weather the current financial crisis.

Nick Coates,
Promise

What clients love and hate about B2B agencies

BIG Forum has had much success in recent seasons with sessions featuring a panel of speakers and the meeting on 2nd June 2009 was no exception.

On this occasion, a well attended session heard contributions from three clients, **Katie Simons** of RBS, **John Clay** – now running his own consultancy (*Research4*) but formerly with Calor Gas and ATS Euromaster – and **Sarah Goodson** of *Accenture*, on what they love and hate about B2B research agencies.

All the speakers preferred to use the words 'likes' and 'dislikes' – thankfully, there were few hates on show! – and the tenor of the meeting was generally positive and constructive. Indeed, B2B agencies are felt to have the edge over their B2C counterparts in their attitudes and approach to research. Nevertheless the meeting provided many useful pointers for B2B researchers and a high degree of consensus as to what agencies should do to make a favourable impact.

All speakers stressed the paramount importance of building a relationship. This requires agencies to acquire and to demonstrate understanding of the client's business, their brands and their markets. This is considered an essential element in enabling agencies to look beyond the narrow remit of an individual research project and to place the research in its broader commercial context.

John Clay emphasized the importance of using secondary information sources to supplement the primary research. He also referred to the value of spending time at the clients' business speaking to different staff members

– particularly in sales and operations – to acquire an understanding of how the company operates.

For **Katie Simons**, this demonstration of understanding should start from the very first sales contact. Agencies should draw on their relevant experience from previous projects, in other industries as well as the client's own, and even on their experience as a customer, to show that they have given thought to the client's needs and concerns and are genuinely knowledgeable and interested in working with them.

Similarly, agencies should do some homework when identifying appropriate contacts for sales approaches. If given an internal referral, make sure you find out something about the person's activities and responsibilities before following up. Equally, as **Sarah Goodson** pointed out, avoid making approaches to an inappropriate target and make use of friendly contacts within an organization to assist you in navigating through the company and understanding who to approach and how.

Above all, agencies should show boldness and imagination in applying their knowledge and understanding of the business to the project in hand. At the proposal stage, for example, agencies should be willing to challenge the brief where appropriate. This boldness should carry through to the debrief stage: the preferred agencies are those that do not treat the research brief as a straitjacket and are able to uncover themes not explicit in the brief. Agencies should be prepared to go beyond simple reporting of data and propose

actions and recommendations that show a wider understanding of the market and of the commercial implications of the findings, using comparisons from external sources where appropriate to support these.

Presentations can also provide pitfalls for agencies that are insensitive to clients' preferences. Clients are pressed for time and presentations should be no longer than absolutely necessary. They should not become bogged down in methodological detail but should focus on outcomes and conclusions. They should tell an engaging story, using all the tools at one's disposal, such as anecdotes, quotations, and audio clips.

Client relationships should ideally work at a personal level as well as a professional one. **Sarah Goodson** made the point that everyone has stressful jobs and if the agency has people that can empathise with the client, be helpful but also have a sense of fun, this was a plus point.

A critical element of any relationship is communication and aspects of agency-client communication were referred to by all speakers. A particular bugbear is senior agency people who appear at the sales stage but are not seen again during the project. Continuity and frequency of contact by the same people throughout the project are key requirements. Agencies want assurance that all the people they deal with have hands-on involvement with the project and are fully informed about it. Agency presenters who can refer to their own personal experiences in speaking to respondents during a project, for example, can make a strong impression. Snippets of initial findings during the project, as well as timely, on demand, updates of

interviewing progress are also much appreciated.

Honesty is an essential element of communication. It is better to be up front in admitting errors or delays – which will generally receive a sympathetic response from the client – than to be economical with the truth and give the impression that all is going well, leading to unpleasant surprises further down the line. Clients should not be expected to check for errors in data or in presentations, and a 'final' version should mean a final version. Relationships are not built on projects running completely smoothly but on a willingness to discuss and work on issues openly together.

It was interesting that basic technical expertise was not raised as a significant differentiator. Consistent high performance at speed is taken almost as a given – an essential requirement for any agency to be considered. However, innovative and proactive solutions are a way to stand out from the crowd. In B2B research innovative ways of approaching hard-to-reach respondents are particularly relevant. Research solutions need not necessarily be complex but provide evidence of flexible thinking, tailored to the client, rather than using off-the-shelf methods.

Not surprisingly, in current economic circumstances, agencies that can find opportunities to save costs also have a distinct edge.

Mike Joseph,
Independent Consultant

BIG Contacts

Trevor Wilkinson	Chair
Tom Smart	Vice Chair/Conference liaison
Sonya Graneek	Treasurer/BIG Forum
Jon Wood	Secretary
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News of Members

Phyllis Macfarlane becomes Chairman of GfK NOP



Phyllis Macfarlane moved to the new role of chairman of *GfK NOP* on 1st July 2009, from her previous position as managing director of the company. **Richard Jameson** who has been her deputy for the past 12 months, took over the role of managing director of *GfK NOP*.

In addition, Phyllis will take overall responsibility for the firm's other UK business units, including the panels, healthcare and media businesses. Globally, she will be responsible for supporting custom research initiatives throughout *GfK* and promoting the firm's knowledge exchange system, which encourages interaction, creativity and shared resources between countries.

Go North West

Teresa Lynch, formerly of *Kudos Research*, part of the *RS Consulting Group*, is now working as Quant Engine Manager at Virtual Surveys in Manchester. As most BIG members will know, Virtual Surveys is a full service market research agency specializing in online research communities, website research and online surveys. As a dyed in the wool Londoner Teresa cannot recommend Manchester too much for long

weekends and cultural breaks and will be happy to entertain any visitors who have the right attitude to rain. You can reach Teresa on teresa.lynch@virtualsurveys.com



Damon Thomas joins Sue Hill Recruitment



Damon Thomas joins Sue Hill Recruitment as Recruitment Manager to establish and develop a new area for the business – *Market Research, Insight and Analysis*. Damon brings with him eight years of knowledge and experience recruiting for the world of market research having headed up teams at other

market research specialists including Elizabeth Norman International and RPCushing Recruitment. Prior to recruitment Damon spent six years in financial services marketing and has an MA in Marketing.

In his new position Damon will work closely with existing clients, whilst building up a portfolio of clients that are market research specific. He will recruit from Research Executive to Director for both market research agencies and client side teams, across all industries. He will also be recruiting for Econometricians, Statisticians, and Research, Data and Market Analysts.

Damon can be contacted on: 020 7378 7068

Mike Joesph goes solo



Mike Joseph has left ORC International and is now offering independent research consultancy services. Mike has over 30 years' research experience, working mostly in full service specialist B2B research agencies, with particular experience in business & professional services, manufacturing industries, utilities, mail, parcels & logistics services.

He is focusing on project design & management, data analysis, evaluation and reporting, desk research and executive depth interviews, offering clients assistance on a full range of projects from small-scale through to co-ordination of complex multi-country surveys.

He can be contacted on mike.joesph99@gmail.com Tel: 020 7354 3960, Mobile: 07939 847235

Richard Field - Obituary

It is with deep regret that we have to announce the death of Richard Field at the end of May following a long period of ill health. His career included a variety of senior roles in organisations such as The Electoral Reform Society, Total Research and HI and he was well known for his roles in business development and public sector work.

He was best known to us as a long term member of the BIG Committee serving for 5 years from the launch of BIG in November 2001 until he felt unable to give full commitment to us due to ill health, personal circumstances and a move to the wilds of Somerset. Richard had a great flair for writing and marketing and was responsible for our early marketing strategy and communications which has helped to get us where we are today.

Richard could always be relied upon to deliver any task he undertook and worked tirelessly for committee. He had a well balanced perspective on life and a great sense of humour which lightened any situation and he had the enviable ability to consistently find novel and practical solutions to any problem or challenge.

On a personal note Richard was one of the kindest, most considerate and polite people I have ever met. He was charismatic, a great raconteur, man of huge integrity and automatically gained respect and credibility from any audience or group. He was prepared to "have a go" or to turn his hand to any task from the most simple or mundane to the complex and unusual.

Richard will be missed and his death is a great loss to the industry and BIG. We would like to extend our sympathies to his wife Jo and daughter Georgina.

Helen Wanford
3rd July 2009



Quiz

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Have a go at the BIG summer quiz – what have you got to lose?

Many thanks to everyone who entered the last quiz and congratulations to Sonya GranEEK of GfK Financial who was first out of the hat with correct answers – full answers below.



We have a bit of a Pimms theme going on this time with the Summer Fruits Quiz. Everyone will be able to answer these questions, so do have a go - the answer to each of the questions contains a type of fruit.

- 1) Which American novel by John Steinbeck, set in the Great Depression, is about the migration of people from the Mid-West to California to look for work?
- 2) Penny Lane was the song on one side of a Beatles double-A sided single? What song was on the other side?
- 3) Which Harlem Globetrotter was known as 'The Clown Prince of Basketball'?
- 4) What were the floating harbours used to support the D-Day landings called?
- 5) Which singer had a hit in 1988 with 'Buffalo Stance'?
- 6) What type of pottery, originating in Japan in the 16th century, is best known for a crackled glaze with polychrome decoration and gilding?

- 7) Which, now indispensable, communications device was launched in 2002?

Please send the answers to all seven questions to claire@strictlyfinancial.com by **14th August 2009** – the winner will be the first out of the hat after the closing date. Answers to all the questions will be published in the next issue (judge's decision is final!).

Answers to Connections Quiz

- 1) 149 is the next number in this sequence - 1, 1, 2, 4, 7, 13, 24, 44, 81... – it is the sum of the previous three numbers
- 2) Bangladesh is the only country in the world with a name ending in the letter H
- 3) Henry IV was the reigning monarch of England when Geoffrey Chaucer died

- 4) 99 Red Balloons was sung by Nena
- 5) And Newcastle United was promoted to the Premier League at the end of 1992/93 season and has been there ever since

Best of luck to everyone!

Stop press



Kathy Hurst has stepped down as chair of the BIG conference and we thank her for all the hard work and unstinting enthusiasm shown over the last four years in promoting the conference as a must in the B2B research calendar.

She has moved to Las Vegas and got married there last month. We wish her every happiness and success in future.

Pene Healey has taken over as conference chair.



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Connect with the important decision-makers in B2B research to advertise your services. To discuss your needs or for further information contact Pene Healey on tel: 020 8864 1834 e-mail: healeypm@btinternet.com