April 2010
Issue 55

BIG times

Newsletter for the **Business Intelligence Group**

Spring has finally sprung

There is a lot to look forward to in May, not least the election! Bookings at the annual conference are holding up well, despite the recession, and we are returning to the Marriott St Pierre in Chepstow for the last time.

The conference has been held in Chepstow for the past seven years and it is time for a change. It has been agreed that the Midlands is more accessible for delegates from both the North and the South in 2011. A very strong programme has been produced by the committee this year with yet more innovations and two excellent keynote speakers, in addition to the client question time, featuring HSBC, Royal Sun Alliance and BSkyB.

There are still places available but don't leave your booking until the last minute otherwise you might be disappointed. Put the 19-21 May in your diary now. This is the very time to get out and about, meet new suppliers and new clients, learn what is new and different and enjoy the conference – after all it is the only one in the UK totally focused on B2B marketing and research. Further information about the conference is on page 3.

This issue focuses on how research in the USA, China and Brazil has fared since we reviewed the situation twelve months ago. Some very interesting views are expressed with different kinds of research being conducted, more focus on green issues and customer satisfaction studies again in fashion. But price is key, which is bad news for the UK, given the poor value of the pound.

The quiz on the back page is a new one and offers the chance to win a £30.00 gift card, courtesy of the sponsor *Strictly Financial*, specialists in financial services research.

***Pene Healey**, Editor*

Client Question Time in Chepstow

The successful client question time is being repeated at conference and features **Lucy Cobby** from *HSBC*, **Julian Dobinson** from *BSkyB*, and **Caroline van den Bos** from *Royal Sun Alliance*.

Lucy Cobby

Julian Dobinson

They will be joining delegates to debate the key questions facing client-side researchers and commissioners, as well as fielding your questions.

The session is deliberately unstructured and delegates have the opportunity to ask any question they want. If you have a burning issue to air Chepstow is the place to do it.

Caroline van den Bos

Sponsorship Opportunities at Conference

As always there are sponsorship opportunities, i.e. the tennis tournament, pre-dinner drinks on Thursday, the after-dinner entertainment, or the formal dinner itself on Thursday. We have added a Buck's Fizz reception to kick start Friday morning and this is still available to sponsor.

We are grateful to have generous offers of sponsorship from some previous and some new sponsors, and at the time of going to print these include *Accent, B2B International, E-Tabs, Illuminas, Insight Research Group, Kadence International, Keen as Mustard Marketing, Quadrangle, Research Now* and *Synovate* but of course more are welcome, so do contact either **Sinéad Jefferies** (sinead.jefferies@royalmail.com) or **Rebecca Candy** (rebeccacandy@sky.com) if you would like to contribute in any way.

The very special mix of serious information exchange and debate, alongside the more informal discussions generated by the parallel social events, is what people love about this conference.

The BIG Golf Event

This renowned golf competition on Wednesday 19 May, sponsored by *Insight Research Group*, commences at 11am. A full round of golf on the St Pierre championship course costs £35.00 and golfers have a chance of winning special prizes. Contact Candice Meyer - **c.meyer@insightrg.com** if you are attending conference and wish to participate. There is also an hour of golf coaching for beginners at 4pm. But places are limited.

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Diary Dates

BIG Conference 2010
Chepstow, 19-21 May

BIG Forum - The client view: what they love and hate
Islington, 8 June

Marketing Week Live
Olympia, 29-30 June

BIG Summer Party
Royal Institution of Great Britain, London 15 July

BIG Times

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News from the Chair

How has the year been for you so far?

Trevor Wilkinson

Quarter one has gone and we're starting to get an idea of how the year is going. Of course there's a long way to go, but already there are signs that 2010 is going to be another difficult year for the research industry. A recent AURA conference focused almost entirely on how clients can make their research more cost effective, and anecdotally there seems to be a good deal of pessimism about prospects for the year.

However this pessimism doesn't necessarily reflect what has happened in 2010 to date and, talking to B2B researchers over the last few weeks, the story I'm hearing is that the year has been 'average' so far. Pessimism is based rather on the fear of what is going to happen in the rest of this year; in quarters two and three we have the start of new (reduced) budgets, an election (spending on research, particularly public spending, always slows before and after an election), a world cup and summer. According to the Institute of Practitioners in Advertising's *Bellwether Report* marketing spend was up for the first time in two-and-a-half years during the first quarter of 2010, but the 'all other' category, including market research spend, is lagging behind.

There was much discussion on this subject at the February BIG Forum, at which **Dave Skelsey** of *Strictly Financial* revisited his presentation given last year on the economy and its effect on the research industry.

Nobody knows anything

This was an excellent session and deserved a much larger audience than we were able to muster. The picture regarding the general UK economy was bleak. The UK GDP is only slowly recovering, retail sales are also only slowly growing, house prices are expected to fall further in 2010, VAT has risen back to its former level, the car scrappage scheme has ended and there is much talk of the 'double dip' recession.

Internationally the picture doesn't seem any better. Moodys has issued credit warnings about Greece and Portugal, Spain has had an unemployment crisis and a housing crash. Japan's public debt is predicted by the IMF to reach 227% of GDP in 2010 (that's high). The only country doing OK in Europe seems to be Poland, of all places.

Dave summarised his comments on the economy with two quotes:

"It's a safe banking system, a sound banking system. Our regulators are on top of it."
(Hank Paulson, July 2008)

"Nobody knows anything."
(William Goldman, novelist and screenwriter)

William Goldman's comment (and maybe more so Hank Paulson's) suggests that we should be wary of predictions. That didn't stop Dave having a go though at the likely impact of the economic crisis on the market research industry. It's not great news, with the industry expected to undergo another difficult year. This seems to affect both large and small organisations.

Having said that, and as **Mike Barnes** observed from the audience, the recession in general (and the research industry by association) appears to be sector specific. Sectors relying on consumers to purchase their services or products (discretionary spend), such as retail, manufacturing, finance, technology and construction, have floundered. Others have thrived, but only relatively so.

Reasons to be cheerful?

So far it's been a bit 'doom and gloom;' are there any silver linings?

Some sectors appear to have thrived, notably 'recession-proof' sectors where consumers require the goods and services anyway, such as education, energy, the environmental sector and healthcare. The public sector has continued to spend on research and, although there is every likelihood that this will grind to a halt during the election period, there is no reason to think it won't pick up again later in the year.

Dave believes that some kinds of research are more recession-proof, such as online research, desk research and other techniques for 'sweating' more information from the data.

One sector of research that is likely to enjoy a prosperous middle of the year is the political polling industry. In February **Dominic Lawson** was bemoaning this in the *Independent* ('Polls do much more for the pollsters than for the public'):

"If you see someone with a smug grin on his face, the chances are he's an opinion pollster. Over the next month and a half he will be raking in enough money to make a banker jealous...No wonder Bob Worcester, founder of the polling organisation MORI, has been able to afford an estate on the Caribbean island of Mustique."

And he doesn't think the pollsters do a very good job anyway.

Encouragingly Business-to-Business research has been less affected than consumer research, perhaps because B2B research has traditionally made greater use of secondary research anyway, and B2B research budgets tend to be smaller, so that the savings by cutting back are not so great.

With that in mind, and in a slightly more positive frame of mind, there is the BIG Conference to look forward to in May. This year's Conference promises to be a good one and I look forward to seeing many of you there. It's important in troubled times to keep learning and to keep networking and I'm sure you'll do both at the Conference.

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As ever I would welcome any feedback on this article and/or any of our activities.

Also check out the website (www.b2bresearch.org) for more information on us and on BIG activities.

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Back to Black? Prospects for B2B Research

Spring is finally here and we can start getting excited about the current conference season. In an increasingly digital age, with many researchers using Twitter, Facebook, LinkedIn and a host of online resources to keep up to date with trends and their contacts, live events might seem less relevant. On the contrary: for many delegates, the prospect of taking time out of the hurly-burly to recharge their batteries, learn new things and catch up with colleagues old and new is paradoxically all the more enticing.

For B2B specialists the annual conference in Chepstow is the cream of the crop. And the only event in the calendar that looks specifically at Business-to-Business issues is better than ever. Over the last few years conference committee has looked at what our delegates most value (thanks to our annual feedback survey, we continue to have our fingers on the pulse!), what new formats are emerging on the conference scene worldwide (our scouts are out and about at conferences home and abroad!) and giving the emerging mix a BIG twist.

Refreshing the formats, keeping what works and replacing what doesn't, has been the mantra this year. The old days of detailed paper after detailed paper are gone. In their place we're excited to present a rich mix of discussion, provocation, keynotes, case studies and interviews. With **Rohit Talwar**, global futurist and founder of *Fast Future Research* and **Fiona Wood**, Director of Research & Insight at the *COI*, we have two heavy-weight perspectives on the state of our industry. But we are also welcoming three relative newcomers to remind us what's special and relevant about B2B, and also what new perspectives they can bring to the party. In our book, variety is very much the spice of life.

We're all really looking forward to three diverse perspectives on what happens when we turn up stones: when we start asking some hard questions, what woodlice do we find scurrying around underneath? **Mike Barnes** (a conference star a few years back), *Facts International* CEO **Crispin Beale** and regular **Neil McPhee** will be tackling the problems of DIY research, the 'inconvenient truths' of fieldwork and why topic guides can stop us listening properly.

One of the perennial favourites of the recent conference programme has been the client round table question time and there are a few changes to the advertised programme. **Lucy Cobby** from *HSBC*, *BSkyB's* **Julian Dobinson** and, from *Royal Sun Alliance*, **Caroline van den Bos** will be joining us to debate the key questions facing client-side researchers and commissioners and fielding your questions.

But this conference is also all about the hard economic realities: are we out of recession yet, and what has recession done for and to us all as researchers and buyers? We will be starting with case studies on how businesses are responding to the recent crisis and will finish with a session that aims to cast light on the path yet to be trodden as we set off in the BIG Time Machine in the excellent company of **Ray Poynter** (*The Future Place*), **Ruth McNeil** (*Ruth McNeil & Associates*), **Sarah O'Brien** (*Vivid Research*) and **Glenn Ward** (*GfK NOP*) to discover what the future holds.

Rohit Talwar

Fiona Wood

Last year we introduced a training session for golf beginners and this was so successful that it is being repeated in 2010. This was in addition to the well-established golf tournament which starts on Wednesday morning. Thus, there is an opportunity for beginners or those who do not play but are interested in the chance to participate in a one hour training session with a professional coach. (The St Pierre has two championship golf courses and a driving range.) So we hope lots of people will want to try swinging a club on Wednesday afternoon and have some fun before the serious side of the conference kicks in.

If you want to get involved you need to be in Chepstow in May. Conference runs from the 19th to the 21st and includes social events, as well as eight sessions of quality content and two future-focused workshops. Don't forget that BIG members qualify for a discount on conference, and rates are as competitive as ever, so book now by downloading the form from: **www.bigconference.org** or contact **Pene Healey** on **healeypm@btinternet.com** or telephone 020 8864 1834

Dr Nick Coates
On behalf of the Conference Committee

Conference Papers

Conference Papers 2008

A CD Rom of the papers from the 2008 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 last year's conference with its theme of **"Challenging the Status Quo"** 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

The effects of the global recession on research suppliers in the USA, Brazil and China one year on.

A recessionary review of market research in the USA

Caroline Harrison

Caroline Harrison, Marketing Manager at global B2B market research specialist B2B International, examines the industry in America over the course of the recession.

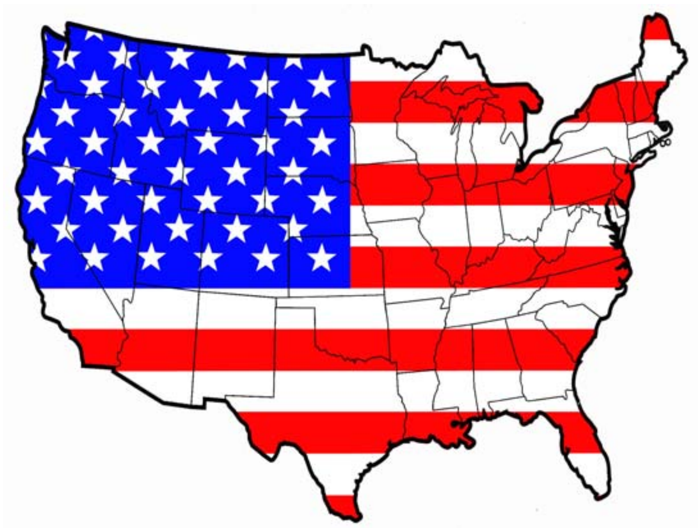
Hot on the heels of the successful opening of its Beijing office in 2006, B2B International took the decision to expand its operations into a further new continent – North America – and its New York office opened in early summer 2008. Not three months later we had the meltdown on Wall Street, triggering one of the deepest and harshest global recessions in living memory.

One question it might be appropriate to ask in these circumstances is whether we would have done things differently, had we known what was just around the corner. While I'm sure we would have thought long and hard before making the decision, in truth we probably would have gone ahead as planned.

Why is that? It's because, as many of you will already know, the market research industry has consistently proven itself to be fairly resilient in times of adversity. Perhaps saying market research is "*recession-proof*" would be going a bit far, but the industry is certainly able to withstand a degree of external pressure.

Conducting market research is, of course, a means of reducing risk in business decision making, and when do companies most need to play it safe? When times are tough. When things are going swimmingly, you can perhaps afford to take the odd chance and risk making the occasional mistake. When the economy is in freefall, there can be no margin for error.

We have to acknowledge that 2009 was a challenging year for many. Budgets in most industries were cut and – while we can argue all day about the logic behind it – market research spend, like expenditure in many other business areas, was reined in for some. Similarly, a number of our clients were forced to delay projects due to the economic uncertainty.



Yet, overall, levels of enquiries and commissions have not altered significantly over the past 18 months. What we did notice, however, during the height of the recession, was a change in the type of research we were being asked to conduct. The more 'aggressive' market entry and market assessment studies commissioned by companies looking to expand into new markets and find new customers were replaced by more 'defensive' projects such as customer satisfaction. It has clearly been more important than ever to protect what business you do have and look after your existing customers to ensure they don't defect. In recent weeks and months, as increasingly we see optimism re-emerge in North America – as indeed globally – clients are gradually feeling emboldened. As their business strategies become more 'adventurous', so too are the types of research they require.

Perhaps a little surprising to us in America has been the high number of clients commissioning product development studies during the recession. However, most of these have not been of the all-out ambitious new product development variety; rather, they have tended to focus more around improvements to existing products or extensions to an existing product range. While we cannot determine precisely the reason for this trend, we believe it has been a measured response to a real or perceived increased threat by competitors' products and/or decreased market share. Product improvements are a means of establishing differentiation at the same time as demonstrating innovativeness and reinforcing a commitment to better serving clients' needs. At a time when the economic environment is forcing many competitors to lie low, product development has the added advantage of giving you something to shout about.

The intensifying of the recession also appeared to curb the movement we had been witnessing towards environmentally-friendly products and services. Many of the first market research projects we conducted upon arriving in the United States in 2008 assessed the potential for introducing 'green' extensions to existing product lines or launching an already-successful North American energy-saving product in other global markets. This type of project request became noticeably less common throughout 2009 but early indications in 2010 – across all our offices, not just in the US., it must be noted – lead us to believe that environmental issues will once again rise to the fore.

A more general observation that can be made about the USA has been the optimism throughout the hard times. Perhaps being a pessimist Brit and used to constant negative media coverage about the doom and gloom we're all facing, being in America has, at times, been like a breath of fresh air. In spite of rocketing rates of unemployment (up from 6% in September 2008 to 9.7% at the time of writing), record mortgage foreclosures, horrendous stock-market declines and trillion-dollar Government bailout packages, what has been noticeable have been the positive messages portrayed in the media. People haven't denied the economic problems but have been very much of the opinion that "things will get better", "together we'll pull through" and "America will rule the world once more." And there I was thinking the British were supposed to be full of Dunkirk spirit!

In part, I think the presidential election of November 2008, which coincided with the start of tough times, generated a lot of positivity. President Barack Obama's "*Change we can believe in*" slogan was a beacon for many. His election was seen as a chance for America to change for the better. Eighteen months on and the general public may not be quite so enamoured with what's being achieved on the political agenda, but negativity has not taken over. Indeed, as we begin to see signs of improvements here on this side of the Atlantic, we are thankful that things have not been worse.
I will conclude by referring to an observation made to me earlier this week by a British colleague, also based here in New York:

"Americans are more confident, more willing to take a risk and therefore more likely to succeed".

That, in a nutshell, sums things up nicely.

Brazil

Trixie Cartwright

Trixie Cartwright, Regional Director, Latin America, TNS

Latin America, like every other part of the world, was hit by the 2009 recession; however, despite the turbulence experienced across the world, the region has shown strong resilience. The growth opportunities in the emerging markets led to predictions that they would come out of the crisis more quickly and as expected there is good evidence of this in the BRICs and next 11 economies. 2010 promises to be a better year and Latin America is already showing signs of bouncing back.

Aggressive foreign and domestic policy responses in the region led to Latin America showing signs of stabilizing in the second half of 2009 after having contracted severely in the first half of the year. Latin America's main driver, Brazil, has weathered the global crisis well, suffering a shorter recession than many countries across the world, getting back onto the growth path halfway through last year. Other countries in the region are following suit. Brazil, like China and India, has a large domestic market helping to drive growth. In addition its abundance of natural resources means additional strengths are achieved through exports. Mexico, also having the additional set back of swine flu, is doing less well: after its GDP contracted with 7-8 percent last year, its economic recovery is below the region's average as well.

There is an impressive increase in the number of businesses from Latin America ranking among the world's largest companies with many Latin American corporations having become multinational over the last two decades. These 'multi-latinas' have mainly expanded throughout their own region, but several have embarked on global expansion, often due to major acquisitions, competing with and challenging multinationals from developed countries. Brazilian mining giant Vale is now the world's second largest mining company, with operations in six continents, and Mexico's CEMEX has become one of the world's largest cement producers through aggressive acquisition strategy. The Fortune 500 ranking for 2009 included 11 companies from Latin America (compared with five in 2005), of which Brazil is now accounting for six.

According to the World Bank Brazil is now the eighth economy of the world, and has taken Canada's place as the second largest economy of the Americas after the Unites States. It is 50 percent bigger than Mexico and represents close to 60 percent of South America's GDP, so if Brazil does well it is a very good sign for Latin America.

Latin America has been a bust and boom economy for years, however prior to the recession the economy had been doing well. Latin America will recover in 2010 but its expansion may well be below its potential, targeting for between three and four percent growth. A strong trade relationship with Asia has become a primary driver of growth for many countries in Latin America and the relative success of Asian countries in avoiding the recession when international trade has been hit hard will be a key driver in accelerating this process. China, for example, has now displaced the US as Brazil's number one export destination. The main driver of growth in the region will be the improved economic outlook for Brazil, although it should be noted that the region's growth outlook in 2010 remains below the 2003 to 2008 trend of around five percent.

Latin America's market research industry is growing fast and maturing and it is moving towards a total market size of US$2 billion revenue. The region has become attractive for the big global players which have built their regional network to service their global and local clients more effectively. Brazil and, increasingly, Mexico are important countries for research with key global clients now including them almost by default in their global research programs. Brazil accounts for over 40 percent of regional market research turnover at almost US$700million (close to China) and together with Mexico accounts for over three quarters of the MR market in the region.

After a year of cautiousness and tightening of budgets, 2010 has got off to a good start, with both corporate and consumer confidence building, investors sounding optimistic, businesses continuing to invest in the region and we are seeing more market research budgets open. There is still a high level of uncertainty and therefore a clear need for research to be focused and to provide insights on how best to succeed in a cost effective way. New research modes are doing well, with both Internet research and qualitative research set to grow, providing deeper insights into the rapidly changing environment. In the current situation the rapid growth emerging markets are more important than ever and competition is growing, and this is good news for the research business.

Looking forward, there are many reasons for the region to be optimistic. Brazil will host the World Cup, the world's most popular sporting event, in 2014 and two years later the Olympic Games, never before held in South America, will be held in Rio de Janeiro. Both events signal real opportunities for growth, will accelerate the development of Brazil and increase its ranking in the world economy bringing yet further attention to the region. It will surely be a positive decade for Latin America.

China

Stanley Chan

Stanley Chan, Managing Director, MIC Consultancy

No one knows whether a planned economy is really superior to the free market but China has displayed an economic miracle of keeping a positive growth momentum in 2009 via the government-led 4000 billion (in local currency) investment. The panic about unemployment and downturn in export at the end of 2008 seems to have vaporized in the beginning of 2010. Taking this as the background, the following observations related to the B2B research industry are noteworthy:

- The growth momentum of the Chinese economy projects a very attractive picture of the domestic demand for different commodities – such demand cannot be found in any other parts of the world because all other big economies are still struggling to avoid disasters. Actually, foreign retailers and related businesses, especially those from Japan and USA, are eager to delve into the Chinese retail market which is now taken as the only viable engine to save the global economy (of course, this view may be wrong but everyone shares this speculation).

  In the past, having a presence in China was mainly for enriching the global network of the company. Currently, all retailers are expecting to rely upon profits in the Chinese market to sustain their business. More and more clients come to us to express their need for an in-depth understanding about the Chinese retail market, such as distributor network/operation, point-of-sales dynamics…etc.

  This hungry need for in-depth understanding is also applicable to the automotive sector.

  We foresee that primary research on understanding the retail and supply chain mechanism in China will become prevalent in the future. This is especially true for luxury goods and automotive as well as other related sectors. This opens up a world of opportunity for B2B researchers/consultants.

- Seeing the strengthening economic power of China, the national political leaders are keen to step up its political influence in the international arena. To do so, China must demonstrate its stature as a strong country. A manifestation of this is to take more responsibility in environmental issues.

  We speculate that the green economy and new energy will become more and more important in different Chinese key cities. This would lead to new research needs for the local government and state-run enterprises to study on how to enhance their "green-ness".

  The demand for B2B researchers and consultants who have rich experience in this regard would increase.

- Another up-and-coming industry evolved from the China "miracle" would be the entertainment business, ranging from internet gaming to film-making. However, there is a real lack of good understanding about the trade practice, distribution and retail mechanism of this industry in China. The major reason is the long-standing belief that the ideology-related businesses must be highly controlled by the government. However, after the global financial tsunami, no one can afford to ignore the huge pool of Chinese consumers and their leisure consumption (the myriads of Avatar fanatics across the whole country are the best evidence of this market potential). Therefore, more foreign and local investors would like to find ways to venture into the Chinese entertainment business despite the need to face potential interference from government surveillance.

The above-mentioned are some emerging opportunities for B2B research. However, it is undeniable that the global financial tsunami has somewhat re-shaped some Chinese buyers' usage and attitude towards B2B research services. The following are some tips:

- Nearly all the buyers are currently more and more cost-conscious. The global financial tsunami, though with minimal influence on them, shows them that everything can have a short life span – they must be more cautious in using their money.

  The above attitude has adverse implications for the research industry: if they need to choose from either spending one dollar in promotion or in research, the former is always the final choice. In this context, B2B researchers must be more patient in explaining the real value of their services to the buyers and more flexible in formulating a cost-effective service to convince the buyer.

- Given the above scenario, buyers are currently more willing to listen to researchers' innovative advice which would lessen their budgetary pressure. Therefore, innovation for data collection methods is the key responsibility for the Chinese research industry in 2010. On the other hand, Chinese enterprises are employing certain new market communication channels to penetrate the market – e.g. membership schemes, internet network communities….etc. Such channels are also new to the researchers – if they can find out a promising and innovative way to measure the effectiveness of these channels, they may enjoy an unprecedented growth in their revenue.

- Finally, we must note that one by-product of the Chinese miracle in the global financial tsunami is the increasing self-confidence of senior executives in the state-run and large private Chinese enterprises. Some of them have realized that the unique management model of China has certain advantages which are not found in Western enterprises. I guess the Chinese business executives' self esteem score would be recorded at an historically-high level if we run a psycho-graphical study among them at this moment.

  In the past, one of the most useful tactics for the researchers/consultants to win a service contract from Chinese enterprises was to present a foreign model or a case study of the global scenario. Currently, more and more Chinese senior executives tend to think that the foreign experience is no longer a panacea. In any case, researchers must be more careful when making comparisons between China and other countries to convince buyers. Looking into the Chinese practice definitely overrides mere knowledge from past cases or theory.

Whether the economic blossom in China is sustainable or not is the issue for economists. However, for us as researchers, it is imperative to be able to grasp the opportunity arising from the market changes as result of the Chinese miracle. Even if it may be just a mirage the fantasy at this moment is powerful enough to drive the changes.

ICG Builds a sense of community

Guy Consterdine, Guy Consterdine Associates, is moderator of the ICG egroup

"Being part of such a supportive network has helped our business hugely... the e-forum proves to be so rich and vibrant on a daily basis."

So wrote a member of the Independent Consultants Group (ICG) about its electronic discussion group (egroup). Another member commented:

"Since being part of the ICG I feel I have a brilliant 'team' of senior, trustworthy contacts with expertise in many more disciplines than I ever had at my fingertips when I was employed by one of the largest UK MR agencies."

Now in its seventh year of existence, the egroup has proved vital and highly successful in building a real sense of community among ICG's members. The egroup embodies great generosity of spirit in exchanging ideas, information, and expertise. I find it quite inspiring. As one participant said:

"It's a real joy to be part of something so positive".

How did it all begin?

The ICG was formed in the 1990s as a special interest group of the Market Research Society, but around a decade ago it became totally independent and self-funding. Today it has just over 370 members, all independents working in market research or related areas, dispersed across the UK and with a scattering around the world.

An early question for ICG was how could members communicate with each other on a more regular basis than the occasional newsletter, and thus get the best out of their membership, and make individual contributions?

Initially, a bulletin board was set up on ICG's website, but it proved a failure. Very few members had the discipline and inclination to go to the website and read the messages regularly at very short intervals. Almost all members just visited occasionally or never. Those who did visit found old requests for advice or information which had attracted little or (more often) no response. Any time-critical posts were out of date before more than a handful of members had seen them. The problem was that members had to go and get the messages, instead of the messages coming to the members.

I was a participant in a flourishing music-based Yahoo egroup, and was convinced a similar group would work well for ICG. The key was that messages come to members, automatically. One or two other people made a similar suggestion. The ICG Committee agreed. Committee member Janet Lang of Lang Research Associates set up the egroup in September 2003 and became the first moderator. I took over from Janet in February 2005.

An early lesson was to switch from opting in to opting out. At first ICG members had to opt in, by registering themselves on the Yahoo website. However less than half of ICG members joined, critical mass had not been achieved, therefore debates were sporadic, and during 2004 the number of posts only averaged one per day.

I found there were two problems. The principal one was inertia: many ICG-ers vaguely meant to join but never got round to it. Second, some made an attempt but found it confusing and gave up. So we decided to enrol every member. In July 2005 I enrolled the backlog of ICG members who hadn't registered themselves – some of whom commented:

"Thank goodness someone is sorting this out for me!"

From then on every fresh person who joined ICG has automatically been enrolled in the egroup. It is possible to opt out but only half a dozen have chosen to do so. There are now 370 members of the egroup. In recent months the number of posts has averaged 15 per day. (For those who find the volume a bit too much there is the option of choosing the Daily Digest - a single long email per day with an index of topics.)

In an ICG Members Survey in 2009 the egroup achieved a very high rating, earning a mean score of 8.2 out of 10, with the most heavily chosen position on the scale being 10 out of 10.

Topics cover all aspects of market research or running your own small business. Requests for advice or information almost invariably receive helpful responses, sometimes in large quantities. There is also commendable courtesy and much wit in the posts. Consequently there are often comments such as these:

"I love the way the group always has an answer for everything; [who] could ever match our collective knowledge?"

"Thanks everyone for your advice on [topic] – much appreciated and I agree that ICG membership is worth its weight in gold"

"Thanks to everyone who has responded to my request - another fantastic example of the range and quality of suggestions that the egroup generates (and so quickly!)"

Specific requests sometimes trigger wider discussions of general interest. As one reader commented "This is why this networker group is so useful - hadn't thought to ask this question but got some useful ideas from the discussion."

The group was summarised by one member in these terms:

"From the egroup we have had plenty of new business opportunities; loads of help, advice and support; lots of new learning; so much fun and laughs; broadened horizons; great new contacts and companionship. And that is why the ICG is so popular, and why there is so much emotional warmth attached to belonging to it."

Emotional warmth: yes, the egroup has given all ICG members a real sense of community. People working on their own, and in some cases geographically very remote, are prevented from feeling professionally or emotionally isolated. They know there is a strong community to hand. One member wrote:

"I have never been part of a more knowledgeable, forward-thinking supportive group".

Another commented:

"It is the best source of support, advice and help in the whole market research industry."

Long may it continue!

guy@consterdine.com

ICG website:
www.indepconsultants.co.uk

Munro Global launches analytical division

Independent research-focused marketing services group Munro Global launched a new analytical division, Munro Analytics, on 22 March 2010.

The formation of Munro Analytics brings together people from across Munro Global to provide plain talking, advanced analysis for clients within a strict quality and security code.

Charlotte Cornish, Chief Operating Officer of Munro Global, states: ***"We have identified a crucial gap in the marketplace - we know that there are many people who are swimming in data and need help to identify how they can turn this into something meaningful for their organisation. This might be to build a balanced scorecard, report on KPIs, identify gaps in their service delivery and so on. Munro Analytics will meet that need."***

The goal is to give clients access to Munro's expertise in a varied range of analytical techniques, whether they be staple outputs of the research industry, to advanced techniques involving complex data transformation and/or data fusion.

Formed in June 2006, Munro Global, which is substantially funded by Acuity Capital, adds Munro Analytics to a portfolio which already includes six established market research firms: FDS International, Maven Research, M-Lab, 3000ft Strategic Insight, field research specialist acefieldwork, and Munro's operational division, Munro Operations. Group turnover is forecast to exceed £10 million in 2010.
For more information, visit their websites at **www.munroanalytics.net** and **www.munroglobal.net**.

Maven Research releases white paper

Maven Research has made their first white paper available for download from their website www.maven.co.uk

This white paper focuses on buying behaviour during these troubled economic times.

The author of the white paper, Head of Commercial Glyn Luckett states: ***"the paper details some of the common issues that businesses face during these austere times and how dedicated research can provide a sound basis to plan actions to drive progress and improvements".***

The white paper is free of charge and can be viewed and/or downloaded from the link on the Maven home page.

Maven Research a specialist in automotive, financial services, business services and employee engagement research, has pioneered the use of web and other technologies in building new and flexible client interfaces.
www.maven.co.uk

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Administration & Membership

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New members

A warm welcome is extended to eleven new members of BIG.

Waireri Mwangi, *Definition Marketing Ltd*
Simon Staplehurst, *Dipsticks*
Paul Morgan, *E-Tabs Ltd*
Emily Kettle, *Facts International*
Beatrice Leedell, *Incisive Media Ltd*
Kate Thompson, *McCallum Layton*
Ben Skelton, *Quadtrangle Group LLP*
Simon Glanville, *Ugam Research Solutions*
Chrissie Rogowska, *Wanford Fieldwork Partnership*
Al Anderson, *Zen Research*
Ian Fraser, *consultant*

Quiz

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Short and sweet, but more lateral thinking needed this time so stretch those mental muscles...

1) What is the largest reptile species alive today?

2) Canada has one, the USA two, but China has the most with 16 – what

3) NA, EA, CC, AB, AS, EM, DS, JI, JY, CD, EC, HS = which group of famous people

Answers to Claire@strictlyfinancial.com by **16 May 2010**.

Best of luck to everyone!

Business Sourcing

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

And finally.............

British Newspapers

Commenting on a complaint from a Mr. Arthur Purdey about a large gas bill, a spokesman for North West Gas said, 'We agree it was rather high for the time of year. It's possible Mr. Purdey has been charged for the gas used up during the explosion that destroyed his house.'
(The Daily Telegraph)

Police reveal that a woman arrested for shoplifting had a whole salami in her underwear. When asked why, she said it was because she was missing her Italian boyfriend.
(The Manchester Evening News)

Irish police are being handicapped in a search for a stolen van, because they cannot issue a description. It's a Special Branch vehicle and they don't want the public to know what it looks like.
(The Guardian)

A young girl who was blown out to sea on a set of inflatable teeth was rescued by a man on an inflatable lobster. A coast guard spokesman commented, 'This sort of thing is all too common'.
(The Times)

At the height of the gale, the harbourmaster radioed a coast guard and asked him to estimate the wind speed. He replied he was sorry, but he didn't have a gauge. However, if it was any help, the wind had just blown his Land Rover off the cliff.
(Aberdeen Evening Express)

Mrs. Irene Graham of Thorpe Avenue, Boscombe, delighted the audience with her reminiscence of the German prisoner of war who was sent each week to do her garden. He was repatriated at the end of 1945, she recalled: 'He'd always seemed a nice friendly chap, but when the crocuses came up in the middle of our lawn in February 1946, they spelt out 'Heil Hitler.''
(Bournemouth Evening Echo)

Heard On The London Undergound Tube

A list of actual announcements that London Tube train drivers have made to their passengers...

1) 'Ladies and Gentlemen, I do apologize for the delay to your service. I know you're all dying to get home unless, of course, you happen to be married to my ex-wife, in which case you'll want to cross over to the Westbound and go in the opposite direction.'

2) 'Your delay this evening is caused by the line controller suffering from E & B syndrome: not knowing his elbow from his backside. I'll let you know any further information as soon as I'm given any.'

3) 'Do you want the good news first or the bad news? The good news is that last Friday was my birthday and I hit the town and had a great time. The bad news is that there is a points failure somewhere between Stratford and East Ham, which means we probably won't reach our destination.'

4) 'Ladies and gentlemen, we apologise for the delay, but there is a security alert at Victoria station and we are therefore stuck here for the foreseeable future, so let's take our minds off it and pass some time together. All together now.... 'Ten green bottles, hanging on a wall.....'.

5) 'We are now travelling through Baker Street ... As you can see, Baker Street is closed. It would have been nice if they had actually told me, so I could tell you earlier, but no, they don't think about things like that'.

6) 'Beggars are operating on this train. Please do NOT encourage these professional beggars. If you have any spare change, please give it to a registered charity. Failing that, give it to me.'