

# Globalpark Annual Market Research Software Survey 2009

Sixth annual survey



## Results and Report

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# Contents

<b>1</b>	<b>Introduction and key findings</b>	<b>4</b>
1.1	About the survey.....	4
1.2	The companies behind the report.....	5
1.3	Key findings of the 2009 survey.....	5
<b>2</b>	<b>Current and predicted activity</b>	<b>8</b>
2.1	Quantitative vs. qualitative.....	8
2.2	Research modes practiced (penetration).....	9
2.3	Research modes by volume.....	11
2.4	Predicted changes in interviewing mode.....	13
<b>3</b>	<b>Mobile research</b>	<b>14</b>
3.1	Viability of mobile research.....	14
3.2	Potential for each mobile technology.....	15
3.3	Benefits of mobile research.....	16
3.4	Challenges conducting mobile research.....	17
<b>4</b>	<b>Online communities</b>	<b>18</b>
4.1	Companies with online communities.....	18
4.2	Growth in the number of online communities.....	19
4.3	Characteristics of communities compared with panels.....	20
4.4	Types of communities run by market research companies.....	20
4.5	Software used for communities.....	21
<b>5</b>	<b>Software usage and attitudes</b>	<b>22</b>
5.1	Packaged software in use.....	22
5.2	Changing software in the next one to two years.....	24
<b>6</b>	<b>Mixed modes</b>	<b>25</b>
6.1	Integrated or separate platforms.....	25
6.2	Importance of mixed mode in data collection.....	26
<b>7</b>	<b>Sample Sources</b>	<b>27</b>
7.1	Which sources of online sample do you use?.....	27
7.2	Online sample sources – utilization trends.....	28
7.3	Sample sources – by volume.....	29
<b>8</b>	<b>Tables and reporting</b>	<b>30</b>
8.1	Distribution methods.....	30
8.2	How important are printed cross tabs?.....	31
8.3	Future demand.....	32
8.4	Future wishes for analysis and reporting tools.....	33
8.5	Variations in analysis and reporting practice.....	34
<b>9</b>	<b>Analysis of sample</b>	<b>35</b>
9.1	Key demographics.....	35
9.2	Seniority and area of responsibility.....	36

## Figures

Figure 1 Research activities undertaken: % volume at each company.....	8
Figure 2 Percentage of market research firms using each mode of research.....	9
Figure 3 Research modes by volumes (% of revenues), four-year trend.....	11
Figure 4 Predicted growth or decline in volumes of research by mode, 4 year trend	13
Figure 5 The viability of mobile research as a methodology.....	14
Figure 6 The potential for each mobile survey technology.....	15
Figure 7 The benefits of mobile research.....	16
Figure 8 The benefits of mobile research, by company size .....	16
Figure 9 The challenges of conducting mobile research.....	17
Figure 10 The percentage of companies operating online communities.....	18
Figure 11 Scatterplot of the number of communities operated .....	19
Figure 12 The characteristics of communities compared with panels.....	20
Figure 13 Packaged versus own-developed software in use.....	22
Figure 14 Plans to change software in the next one to two years, 2006-09 .....	24
Figure 15 Mixed-mode research, proportion of usage of integrated platforms vs. switching between different platforms.....	25
Figure 16 The importance of multimode data collection .....	26
Figure 17 Sample source trends by region.....	27
Figure 18 Sample source trends by company size.....	27
Figure 19 Sample source trends 2004-09.....	28
Figure 20 Sample sources by volume (revenue).....	29
Figure 21 Share of projects using each distribution mode, by company size.....	30
Figure 22 Percentage of projects using each distribution mode 2006-09.....	31
Figure 23 The importance of printed cross tabs 2004-09.....	31
Figure 24 Changes in demand for new ways of delivering results – overview .....	32
Figure 25 Future wishes for analysis and reporting tools.....	33
Figure 26 Analysis and reporting practices by region and company size.....	34
Figure 27 Respondents' levels and areas of responsibility.....	36

## Tables

Table 1 Research modes practiced, current year.....	10
Table 2 Research modes by volume (revenue), current year .....	12
Table 3 Predicted growth for communities.....	19
Table 4 Types of communities operated.....	20
Table 5 Use of packaged versus own-developed software, 5-year trend.....	23
Table 6 Distribution of integrated platforms by region and company size .....	25
Table 7 Predicted demand for new result delivery methods .....	32
Table 8 Respondents by region and company size .....	35
Table 9 Respondents by country.....	36

# Introduction and key findings

## 1.1 About the survey

The Globalpark Annual MR Software survey, now in its sixth year, is conducted annually by meaning ltd, an independent research technology consultancy in London. The survey provides a unique set of information and insights into software and the interplay of technology and methodology within the market research industry. It provides a snapshot of current usage and attitudes and predictions from practitioners, and identifies trends from a number of tracking questions that are asked repeatedly each year.

For 2009, the survey has been kindly sponsored by Globalpark. In the five preceding years it was sponsored by Conformat. Previous versions of this report can be downloaded from the meaning website at <http://www.meaning.uk.com/your-resources/papers-and-presentations/>

The survey comprises a sample of around 200 market research companies globally, selecting individuals who are responsible for, influential in or aware of technology decisions within their company. The sample is drawn to ensure representation of three global regions: North America, Europe and Asia Pacific, balanced to represent the relative amount of research carried in these regions, according to figures published by ESOMAR.

The survey consists of a self-completion interview on the Web, comprising around sixty questions and timed to last approximately fifteen minutes.

Unfortunately, participation rates have been falling over the years, and this year the response rate (measured as the number of effective invitations issued, after the removal of bounce-backs, divided by the number of complete interviews achieved) was 11.4%. Furthermore, the sample achieved fell short of the desired 200 responses, at 188.

Despite a low response rate, the survey has succeeded in including a large proportion of senior people within the target group from *bona fide* research companies. Furthermore, many of the trends measured by the survey show a high level of consistency with previous years, so we do consider that the findings have value. However, due to the nature of the sample, as in previous years, we do not attempt to estimate a margin of error, and advise caution in the interpretation of the findings. This report concludes with an analysis of the sample composition, in Chapter 9 (p. 35).

The 2009 Survey, as in previous years, comprises a mixture of tracking questions and new questions for that year which explore topics of the moment. For 2009, these two topics were Mobile Interviewing and Online Communities, which are presented in Chapters 4 (p. 14) and 5 (p. 18) and a summary of all the key findings of the study is given in Chapter 1.2 (p. 5).

## 1.2 The companies behind the report

### 1.2.1 Globalpark: sponsor of the survey

Globalpark provides panel community and survey software that enables organizations to manage what matters across the enterprise. By capturing feedback and tracking behaviour of customers, employees and partners, they gain insights that drive better business decisions. By identifying and empowering influential advocates, they build reputation and extend reach.

Founded in 1999, Globalpark software is German-engineered and globally-tested by leading brands and top market research institutes, including: Continental, Daimler, General Mills, GfK, IDC, Nintendo, SonyBMG, TNS, Warner Music and Wrigley. Globalpark is staffed by renowned research pioneers, with offices across the US, UK, Germany and Austria.

### 1.2.2 meaning

meaning is an independent consultancy practice based in London which specialises in the application of software, technology and methodology to every aspect of market, opinion and social research.

Founded in 2003 by Tim Macer, who is a prolific author on the subject of research technology, meaning advises research companies and research users on how to make better use of technology. It also works with a wide range of specialist software providers helping them to design better products for research. In addition, meaning carries out research within the field of research technology, the results of which it always makes available through its website at [www.meaning.uk.com](http://www.meaning.uk.com) or through publication.

## 1.3 Key findings of the 2009 survey

### 1.3.1 Mobile research

- **Research industry split over viability.** Research is split on the viability of self-completion mobile-based research, with 45% seeing it as viable 48% only seeing it as close to becoming viable (and not really viable at present) with a further 7% never expecting it to be viable (Figure 5).
- **Large firms much more open mobile research.** Mobile research is considered much more viable among large companies though, with two-thirds seeing it viable now, to some extent, and North America favours it more than Europe; Asia Pac is the most skeptical region (Figure 5).
- **Convenience to respondents seen as the main benefit.** This is followed by better response rates, better coverage and being closer to 'the moment of truth' (Figure 6).
- **Small form factor seen as the greatest challenge.** This is followed by access to the sample and the challenge of working with different devices. Confidentiality from participating in public places is not viewed as an issue (Figure 9).

### 1.3.2 Communities

- **Communities are still very rare.** Only one in six research firms operates a community at present. One in four of the larger firms have them but that drops to one in ten among smaller firms (Figure 10).
- **Early adopters are still operating very few communities.** 59% of firms operate three or less communities and a third of them have only one (Figure 11).
- **Interactivity is the key difference.** Half of firms see the ability for members to interact with each other as a key differentiator in communities as opposed to research panels. This is closely followed by a focus on an area of special interest (Figure 12).
- **Growth predictions are strong** particularly among the largest and also small firms (Table 3).
- **Consumer communities dominate.** Only one in five communities are B2B, the rest are consumer (Table 4).

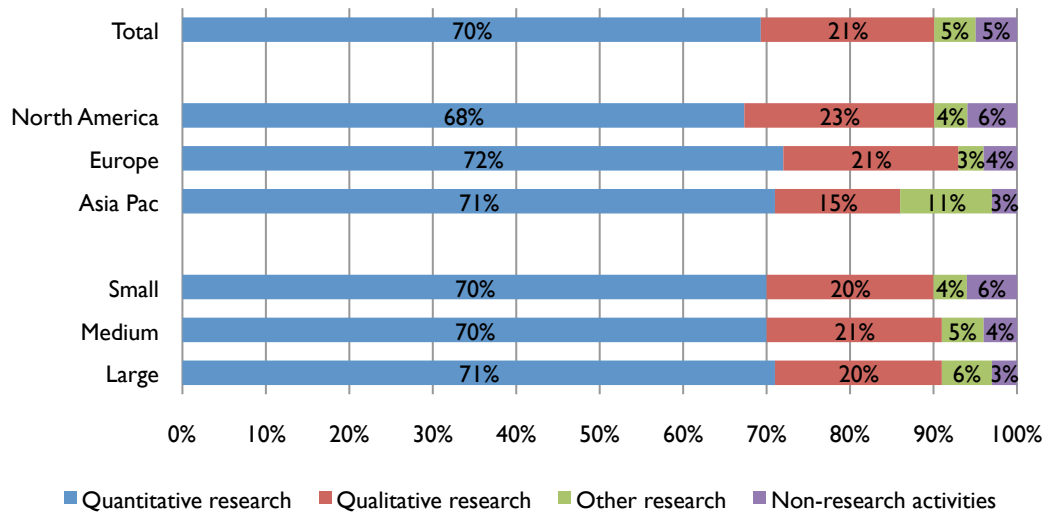
### 1.3.3 Research software trends

- **Quant may dominate but qual still important.** While quantitative research dominates (70% of firm's revenues worldwide), quant remains a significant activity for research companies and is widely practiced, bringing in another 20% of revenues. (Figure 1).
- **Web rules supreme; CATI is declining gradually.** Web remains the dominant mode with 94% of companies providing it, deriving 46% of their revenues from it. Over the past 5 years, the research modes offered have varied little, but the proportions of work has shifted to the web, though the decrease in CATI is gradual (Figure 2).
- **Minority modes growing.** Mobile modes and mixed modes remain minority activities, though they all show growth.
- **Some growth in SMS.** Our survey has detected a small but consistent increase in the use of SMS over the years, both in the companies offering it and the amount of activity.
- **Prediction: web at peak, CATI taking a hit.** The outlook from participants to future trends shows CATI taking a hit, but with Web appearing to have reached its peak, CAPI remaining largely unchanged but with many of the more novel methods being tipped for significant growth (Figure 3 and Figure 4).
- **Large firms more adventurous over new methodologies.** Larger companies are anticipating more rapid growth in mobile methods than the smaller firms, and the other newer methods, and also predicting a more rapid decline in paper-based surveys. The medium-sized companies come across as rather more conservative than the large ones in their predictions for future adoption of the newer modes. (Figure 4 and Figure 5)
- **Also new delivery methods.** Larger companies are anticipating more rapid growth in mobile methods than the smaller firms, and the other newer methods, and also predicting a more rapid decline in paper-based surveys. The medium-sized companies come across as rather more conservative than the large ones in their predictions for future adoption of the newer modes (Figure 24).
- **Demand for new software remains strong.** A third of companies are considering changing their MR software, and a quarter are not sure: the recession seems to have had little effect on firm's willingness to consider changing their software (Figure 14).

- **Mixed mode software now more common.** There has been a steady rise since 2006 in the number of firms with integrated platform for mixed mode research, from only 38% in 2006 to 59% in 2009 (Figure 15). The growth has been strongest in North America (Table 6).
- **A mixed mode offering is a necessity for MR firms.** It's an important consideration for 84% of firms, when thinking about new software (Figure 16).
- **A quarter of panels volumes now comes from firm's own proprietary panels** though large firms making even greater use of their own proprietary panels (Figure 20).
- **Electronic results delivery remains flat.** PowerPoint continues to dominate as the delivery method, with little growth seen in other interactive or web-based methods, despite anticipated demand (Figure 21, Figure 22)
- **Demand for bulk 'printed' cross-tabs declining – but very, very slowly.** Those considering them essential have dropped from 59% to 50% over the six years of the study, but the small minority who see them as unnecessary remains remarkably static (Figure 23).
- **Strong growth for dashboards and info portals.** Around a quarter of firms anticipate a major increase in demand (Figure 24, Table 7).
- **Charting remains a key unmet need.** Two-thirds of firms still looking for better tools to automate the production of charts and PowerPoint (Figure 25).

## 2 Current and predicted activity

### 2.1 Quantitative vs. qualitative

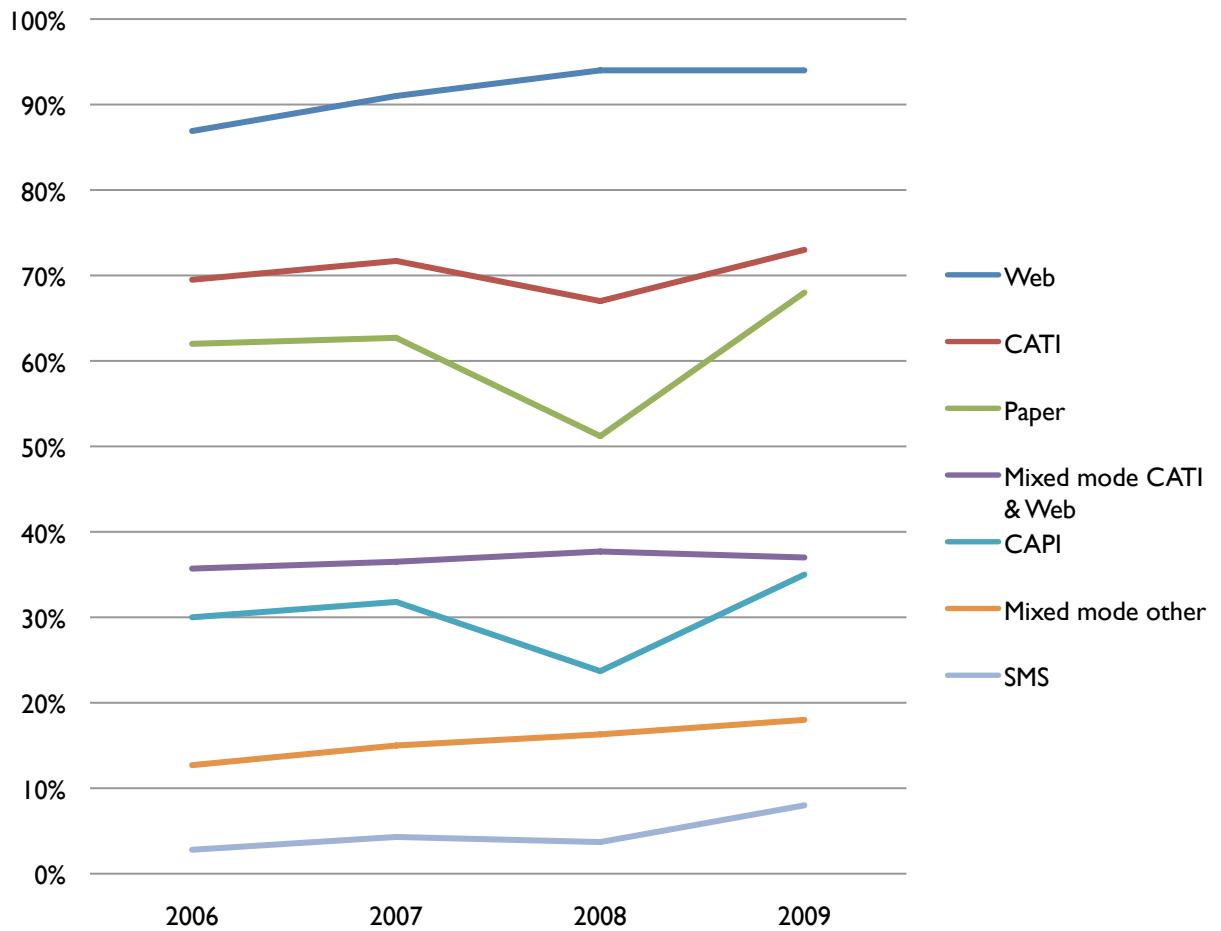


**Figure 1 Research activities undertaken: % volume at each company**

- Between two thirds and three quarters of research revenues are quantitative – and this figure is much the same for all regions and company sizes
- The rest is divided into qualitative research, other research and non-research activities, with qualitative accounting for most of the rest of activities. These figures are broadly similar for all regions of the world and company sizes. The only possible exception is Asia Pac, where the qualitative research appears to be of less importance than elsewhere and 'other research' is of greater importance, but this difference could be due to the relatively small sample size for the region, which is 31.



## 2.2 Research modes practiced (penetration)



**Figure 2 Percentage of market research firms using each mode of research**

- As in previous years, the Web is by far the most widespread mode of research, with nearly all respondents (94%) saying that their companies do this type of work. In 2009, it is the first time that the figure for Web has remained static.
- The proportion of companies using CATI has remained at around 70% since 2006.
- In 2008 there was a large drop in the use of PAPI. In 2009, there appears to have been a steep increase. It is not clear why this would have happened; especially as is shown in the next section of this report, the proportion of revenues from PAPI has decreased every year, except 2009.
- CAPI, like PAPI, experienced quite a significant drop in 2008 and then bounced back in 2009. In the case of CAPI this could be due to a possible increase in popularity of mobile CAPI as the technology matures.
- Mobile CAPI is a significant methodology, with 21% of companies offering it in 2009 (we do not have figures for previous years). In North America, where laptop CAPI is traditionally not as widely used as elsewhere, mobile CAPI is offered to a similar extent as elsewhere in the world.
- Company size has a strong effect on the likelihood of CAPI usage – the larger the company, the more likely it is that it includes CAPI in its portfolio. More than two-fifths (43%) of large companies conduct laptop CAPI surveys, whereas just over one-

fifth (23%) of small companies do so. The story is similar, but more extreme, with mobile CAPI – 43% of large companies offer it against 15% of small companies.

- In 2008 it appeared that they may be a gradual upward trend towards mixed mode research. However, this is looking slightly less certain now, since there has been no increase between 2008 and 2009 – in both years, 45% of respondents say that they are employing this method, against 43% in 2007 and 41% in 2006. As in previous years, nearly all of this is a combination of Web and CATI. The usage of this method has remained stable since 2006, whereas ‘other mixed mode’ has grown, if only very gradually, from 13% in 2006 to 18% in 2009.
- It appears that SMS interviewing could be taking off, although it is still a minority methodology. In the 2008 survey 4% of companies offered it and in 2009 it was 8%. These figures are small, so they must be regarded with some caution. In the 2008 study it seemed that large companies were starting to explore SMS, and in the 2009 there is a wider range of companies offering it. Out of the 188 respondents who completed the study, 15 said their companies offer SMS surveys. Of those 15, seven were from large companies, representing 19% of large companies. 10% of medium companies offer SMS and 3% of small companies.
- ‘Self completion using mobile devices’ is still very much a minority methodology with 11 of the 188 respondents saying that their companies offered it. Of those 11, nine were in North America.

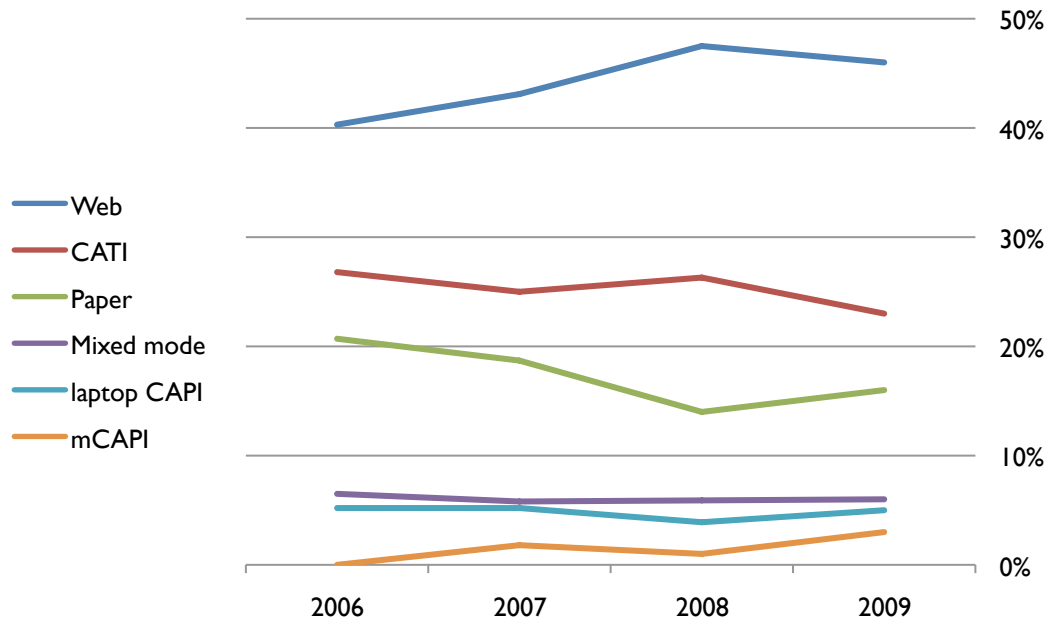
## 2.2.1 Current year, research modes practiced

2009		Total	North America	Europe	Asia Pac	Small	Medium	Large
	<b>N</b>	<b>188</b>	<b>74</b>	<b>83</b>	<b>31</b>	<b>96</b>	<b>52</b>	<b>37</b>
	Web	94%	99%	94%	81%	96%	88%	95%
	CATI	73%	76%	76%	61%	71%	65%	89%
	Paper	68%	62%	73%	68%	70%	62%	73%
	Mixed mode CATI & Web	37%	46%	37%	16%	33%	33%	54%
	Laptop CAPI	29%	24%	35%	23%	23%	29%	43%
	mCAPI	21%	22%	19%	26%	15%	17%	43%
	Other mixed mode	18%	20%	18%	13%	14%	25%	22%
	IVR	12%	23%	6%	3%	4%	15%	27%
	SMS	8%	12%	5%	6%	3%	10%	19%
	Self-completion on mobile devices	6%	12%	2%	0%	4%	4%	14%

**Table 1 Research modes practiced, current year**

## 2.3 Research modes by volume

We ask respondents to estimate the percentage of work undertaken, as a proportion of the company's total revenues, for each mode, in order to be able to estimate the relative volume of research carried out by each mode. However, this does not necessarily equate to the number of interviews carried out by each mode, as the cost per interview can vary by mode.



**Figure 3 Research modes by volumes (% of revenues), four-year trend**

- Web research has grown in the last four years. Whereas in 2008 its growth appeared to be at the expense of PAPI, not CATI, this is no longer quite so clear. Since 2006, Web revenues have grown from 40% to 46% in 2009, and in the same period CATI has dropped from 27% to 23% and PAPI from 21% to 16%. Other modes are relatively unchanged.
- Looking at the world as a whole, nearly half of revenues from quantitative research (46%) are from Web studies. It is therefore the biggest source of revenue for MR companies and it has increased every year, except 2009.
- Web, CATI and paper together are the source of most (85%) of the revenues from quantitative work. This overall percentage has remained virtually unchanged since 2006.
- For the world as a whole, mixed mode research represents 6% of revenues (and the same is true for the years 2006, 2007 and 2008). This figure is fairly consistent for all regions and company sizes. It seems a lower than expected proportion of revenues given that well over two-fifths of companies are conducting mixed mode research. (section 1.2)
- Similarly laptop and tablet CAPI provides a low proportion of the income (5%) compared with the number of companies who use it (29%).
- It is noticeable that in Europe the total revenue from CAPI (on laptops or tablets and mobile devices) is 8%, whereas it is 3% elsewhere. The revenue from paper research is also proportionally greater than in other parts of the world.

- In North America, the revenue from CATI is 31%, which is significantly higher than in other regions.
- SMS, IVR and ‘other self completion on mobile devices’ provide 1% or less of revenues in all regions. (For the sake of clarity, all of these modes of research have been omitted from the chart).
- Companies of all sizes earn their revenue in very similar proportions to each other. All are earning just over a quarter from CATI. Smaller companies earn a slightly lower proportion of their revenues from Web and more from paper. Medium and large companies are earning half of their revenues from the Web and only around 10% from PAPI.
- It is noticeable that large companies earn more from CAPI than smaller and medium companies. At 8%, it is still a small proportion of their overall revenues, but it is double that of small and medium companies.

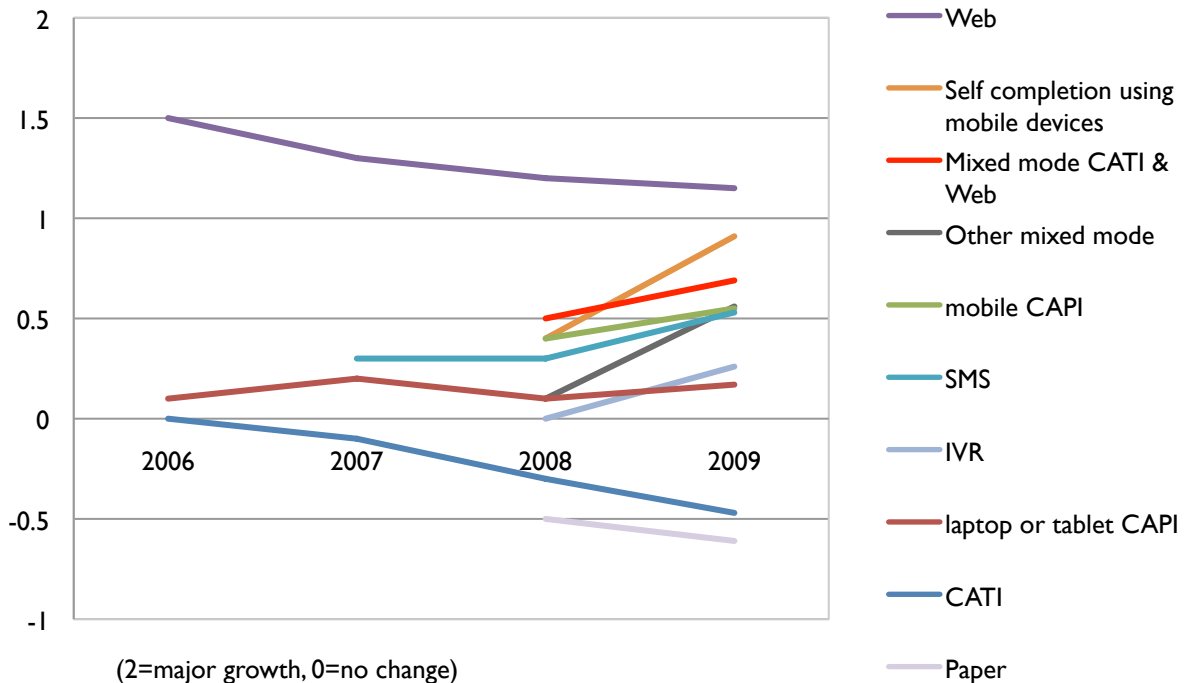
### 2.3.1 Current year research modes by volume

<b>2009</b>	Total	North America	Europe	Asia Pac	Small	Medium	Large
<b>N</b>	<b>188</b>	<b>74</b>	<b>83</b>	<b>31</b>	<b>96</b>	<b>52</b>	<b>37</b>
CATI (single mode)	23%	31%	23%	22%	27%	27%	27%
Laptop or tablet CAPI	4%	2%	6%	3%	3%	3%	7%
CAPI on handheld or mobile devices	2%	1%	2%	*	1%	1%	1%
Web surveys (self completion)	47%	48%	45%	55%	44%	50%	49%
SMS text messaging (self completion)	*	*	1%	*	*	*	*
Other self-completion on mobile devices (not SMS)	1%	1%	*	*	*	*	1%
IVR (Interactive Voice Response)	*	1%	*	*	1%	1%	1%
Paper	16%	12%	17%	13%	18%	9%	10%
Mixed mode CATI and web	3%	4%	4%	4%	5%	3%	3%
Any other mixed mode	3%	1%	2%	2%	1%	4%	2%

\* Value is <0.5%

**Table 2 Research modes by volume (revenue), current year**

## 2.4 Predicted changes in interviewing mode



**Figure 4 Predicted growth or decline in volumes of research by mode, 4 year trend**

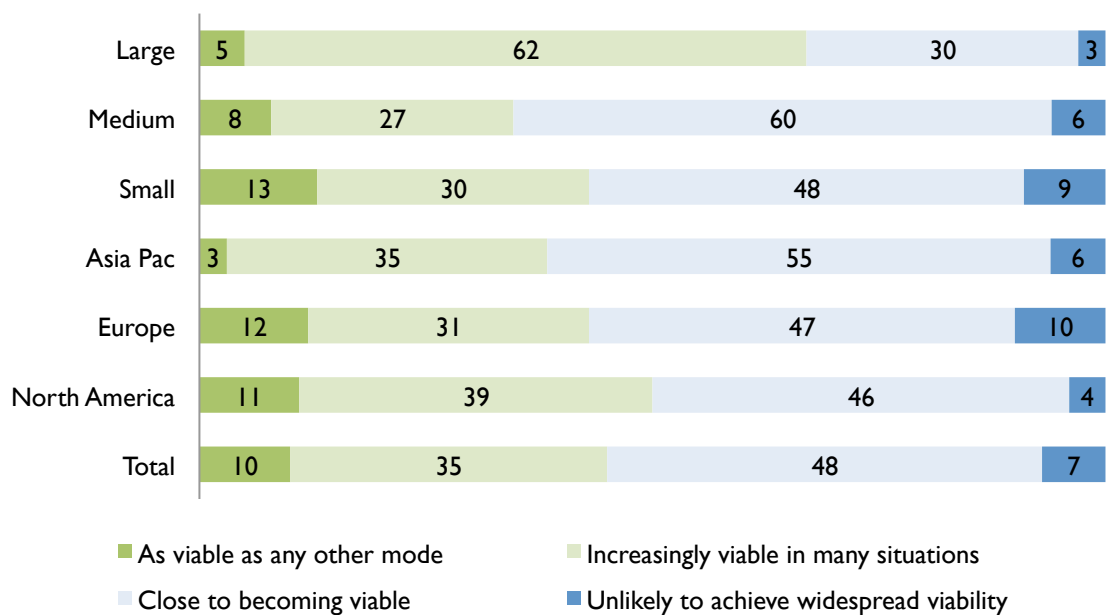
We asked respondents to predict changes over the next three years using a 4-point scale, where 2 represents *major growth*; 1 *modest growth*; 0 *no change* and 1 *any decline*. Here, we present the difference between the predicted volumes and the current estimated volumes, to emphasize the extent of the change anticipated.

- Web stands out as the biggest growth area over the next three years. However, the anticipated rate of growth has slowed every year since 2006 and it is now in the 'modest growth' category.
- There is clearly increased optimism about 'self completion using mobile devices'. In 2008 very slow growth of 0.4 was forecast; in 2009 this growth is still modest, but now much stronger at 0.9.
- Mixed mode (CATI and Web), mobile CAPI and SMS are expected to show a very modest growth, and again there seems to be increasing optimism in these areas. The growth of the former is consistent with the results above in sections 1.2. The other modes are currently such minority areas that it is hard to comment much further.
- CATI and PAPI are expected to decline modestly. The result for PAPI certainly seems to be borne out by the results in 1.2. However, the situation with CATI is less clear.

# 3 Mobile research

Mobile research was one of the new research topics for the 2009 study.

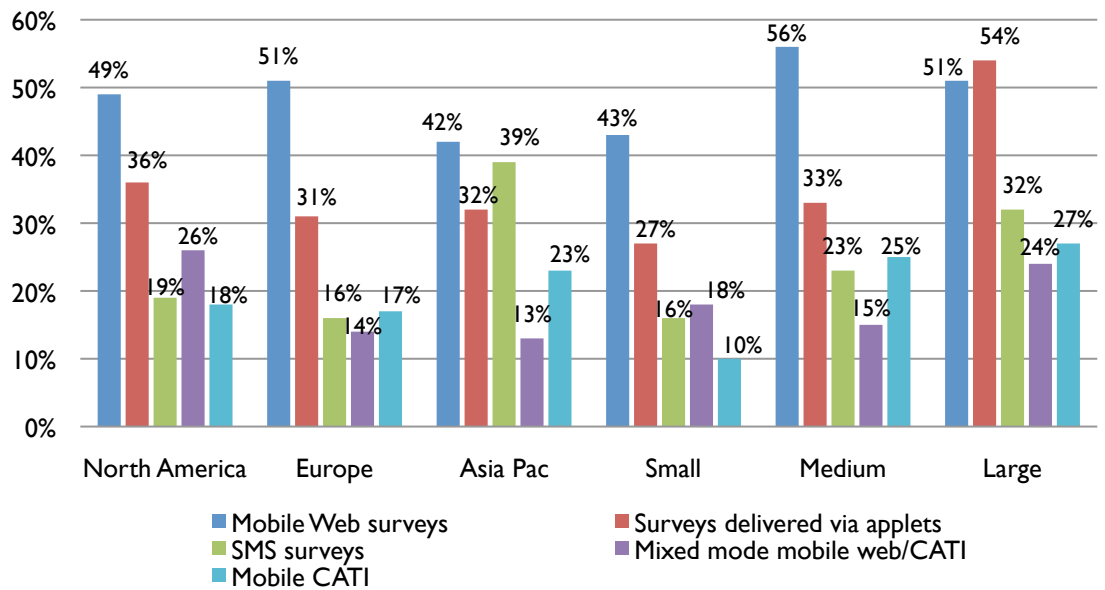
## 3.1 Viability of mobile research



**Figure 5 The viability of mobile research as a methodology**

- It is very striking that large companies have a far more optimistic opinion about the viability of mobile research. Two thirds of them think that it is either now viable or 'increasingly viable in many situations' as opposed to less than half of companies as a whole. This appears to support the findings in section 1.4.
- Medium-sized companies and those in Asia Pacific seem to be quite cautious about the viability of mobile research with just over a third of respondents in each case saying that it is viable or 'increasingly viable in many situations'.

## 3.2 Potential for each mobile technology



**Figure 6 The potential for each mobile survey technology**

- HTML Web surveys delivered via the mobile device's Web browser are thought by our respondents to have the most potential, with nearly half choosing this technology as one of those with the greatest potential for growth.
- All of the technologies listed in the question received a significant number of 'votes', so the respondents consider all of them to have potential.
- Surveys delivered via their own applications or applets were thought to offer the next greatest potential, with one third of respondents choosing this technology. However, it has to be noted that over half of those in large companies thought that this technology offered the most potential.
- Overall, one in five of respondents think that SMS surveys is one of the mobile technologies with greatest potential, but there is quite some variation in this response by region and especially by company size – only 16% of small companies saw this as offering great potential, whereas double the number (32%) at large companies considered this to be the case. In Asia Pac, SMS is seen as a close second in potential to HTML Web surveys.

### 3.3 Benefits of mobile research

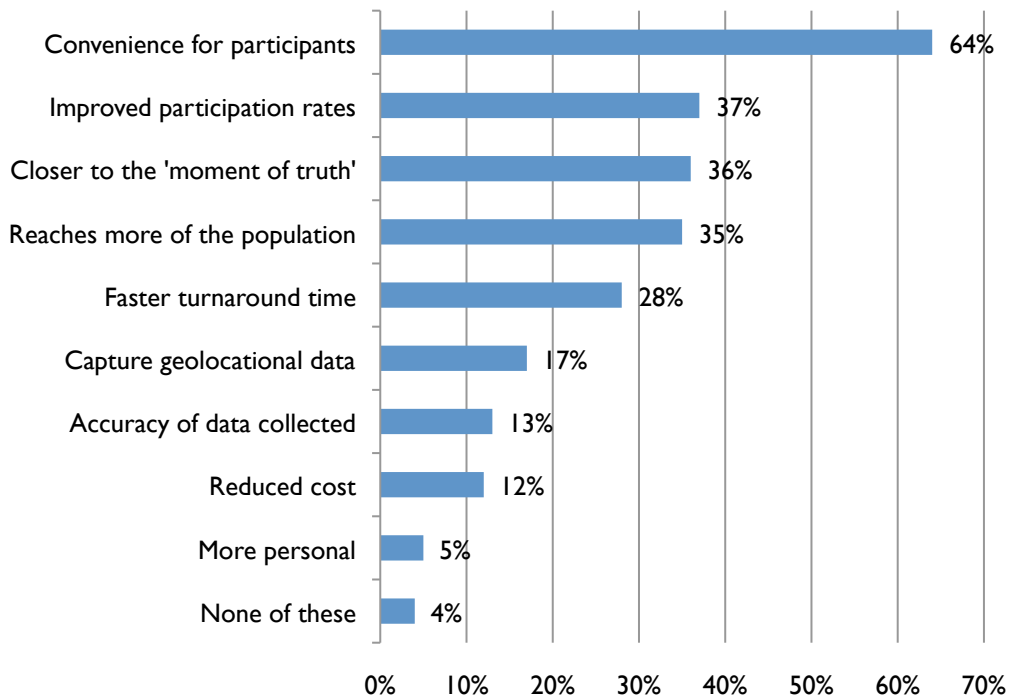


Figure 7 The benefits of mobile research

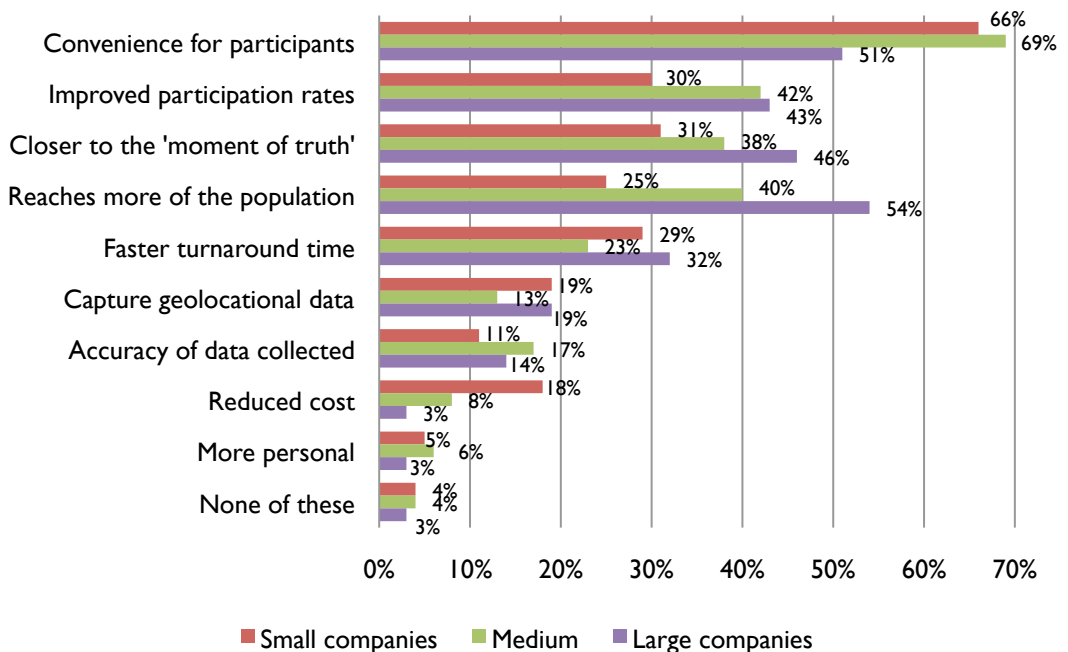


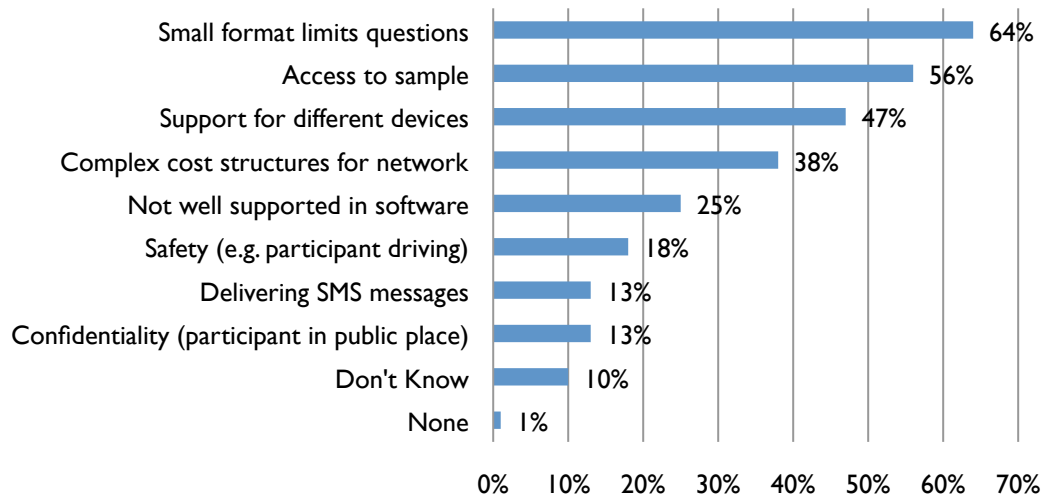
Figure 8 The benefits of mobile research, by company size

- The top four benefits of mobile research are all closely related to the respondents – their convenience, encouraging them to participate, being closer to their ‘moment of truth’ and reaching more of the population. These are all quality issues, rather than efficiency gains or opportunities for gathering new types of data. Although ‘faster turnaround’ is seen as important by over a quarter (28%) of respondents.



- The larger the company, the greater the perceived benefits of mobile research. For example, 25% of respondents at small companies see ‘reaches more of the population as a benefit’ and the corresponding figures for medium and large companies are 40% and 54% respectively.

### 3.4 Challenges conducting mobile research



**Figure 9 The challenges of conducting mobile research**

- Almost two-thirds of respondents feel that the way the small format of a mobile device limits the type of questions you can ask is the biggest challenge with mobile research.
- The ever-present challenge of obtaining sample is the second most important challenge, with over half of respondents choosing this.
- The problems associated with ‘support for different devices’ was chosen by nearly half of all respondents.
- The difficulty of dealing with the complex charging structures of the mobile phone networks was selected by over a third (38%) of all respondents.
- The results are broadly similar for all regions. There is some small variation by company size, with only 11% of large companies selecting ‘not well supported in the software’ and only 13% selecting ‘delivering SMS messages.’

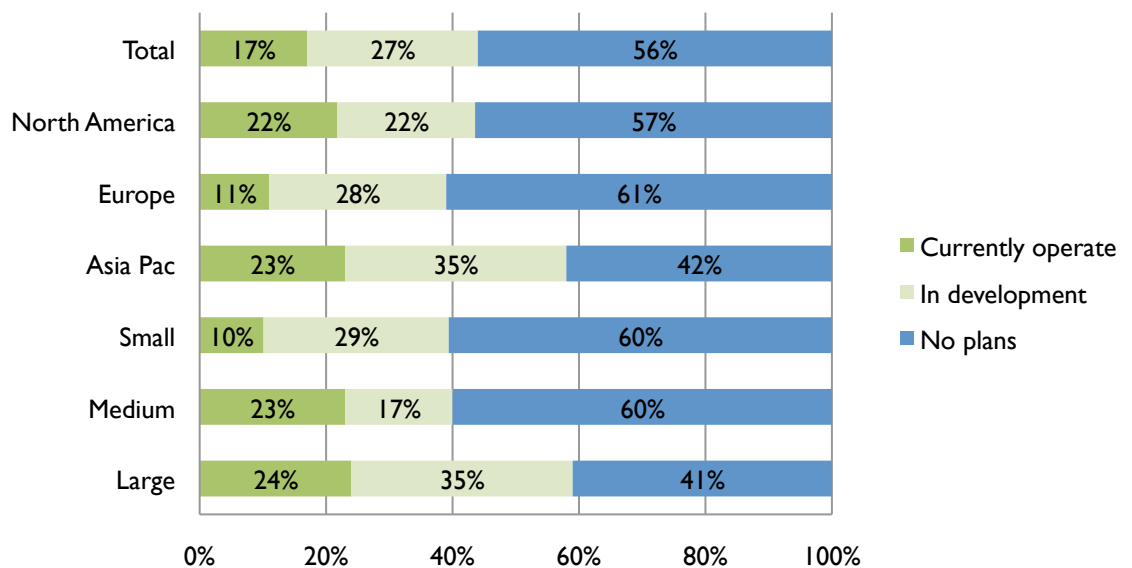
# 4 Online communities

The 2009 survey also included a number of questions to explore the growing phenomenon of research communities for the first time.

Communities are still relatively rare, and the questions where we explore practice therefore have a very low base. These figures should therefore be considered indicative. More research is clearly required in this emerging area. We have shown the bases in each case.

## 4.1 Companies with online communities

N=188



**Figure 10 The percentage of companies operating online communities**

- Only one in six companies (17%) are currently operating any online communities.
- Over half (56%) of companies have no plans to operate an online community.
- In Europe there seems to be particularly little uptake of online communities – just over one in ten (11%) are currently operating an online community, just over a quarter (28%) plan to start an online community, but six out of ten (61%) have no plans to start an online community.
- In Asia Pacific the picture is quite different, with nearly a quarter (23%) already operating online communities, over a third (35%) planning to do so, and just over two-fifths (42%) having no plans.
- Large companies appear to be much more likely to be moving into online communities with nearly a quarter (24%) already operating them and over a third (35%) having plans.

### 4.1.1 Number of communities operated by each company

N=32

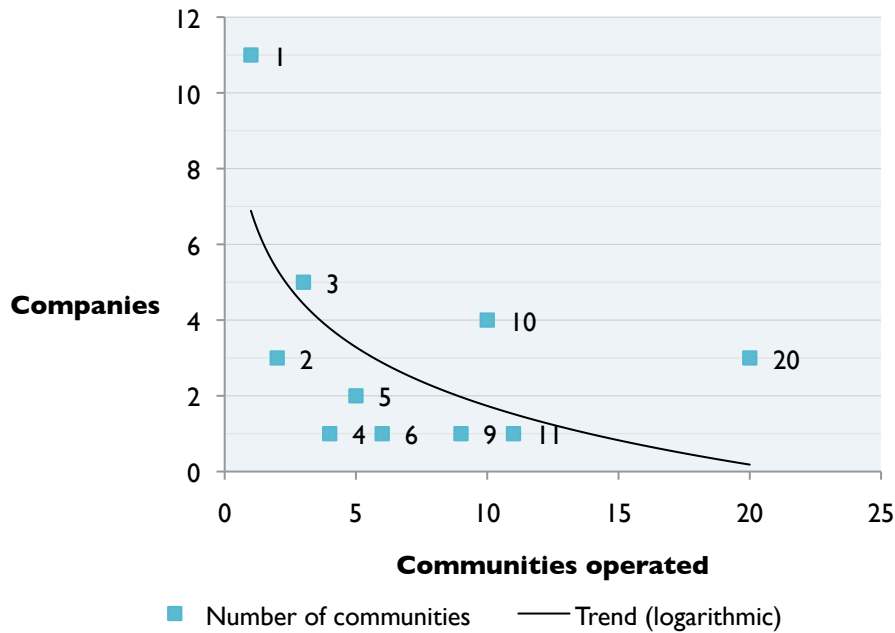


Figure 11 Scatterplot of the number of communities operated

- Communities appear to be still in the early adoption stage.
- Only 32 companies (17%) of our sample of 188 are operating any communities.
- The actual number of communities, among those operating them, is very low: 59% of companies are operating three or less, 35% are operating only one.
- Five companies are operating ten or more each.
- Sample sizes are small, therefore interpretations should be made cautiously on the basis of these figures.

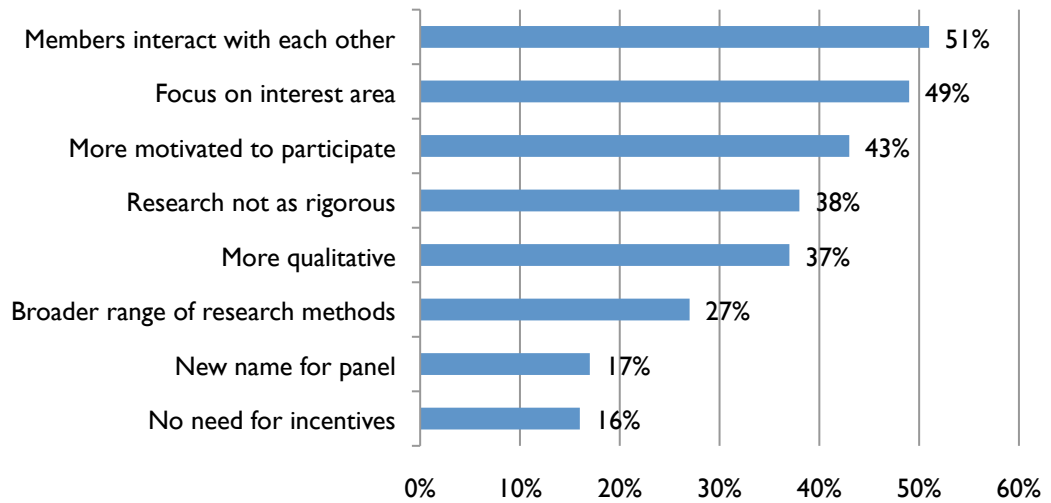
## 4.2 Growth in the number of online communities

N	N						
	All	America	Europe	Asia Pac	Small	Medium	Large
	82	32	32	18	38	21	22
Increase strongly	34%	38%	38%	22%	29%	33%	45%
Any increase	84%	88%	94%	61%	84%	76%	90%
Stay the same	7%	3%	6%	17%	11%	10%	0%
Decrease	2%	3%	0%	6%	0%	5%	5%
Can't say	6%	6%	0%	17%	5%	10%	5%

Table 3 Predicted growth for communities

- The respondents predict reasonable growth in the number of online communities they expect to run over the next year, 84% overall, and 34% predicting strong growth.
- Large companies predict the strongest growth, followed by the smaller firms.
- Asia Pacific seems more uncertain, though on a low base of 18 respondents.

### 4.3 Characteristics of communities compared with panels



**Figure 12 The characteristics of communities compared with panels**

- About half of the respondents thought that the two main differentiators between a community and a panel were that in a community members are encouraged to interact with each other and also communities usually focus on a particular area of interest. One could surmise that a community is a more interesting experience for the participants.
- The third most often cited difference between communities and panels is that those in communities are more motivated to participate.
- A sizeable minority (38%) think that community research is not as rigorous as panel research. This may be because the method is also viewed as being “more qualitative” by 37%, and also a side-effect of more motivated respondents and informed respondents. It would be interesting to know more about this.
- Relatively few respondents thought a community was simply a new name for a panel, so in most researchers’ minds, the two approaches are differentiated.

### 4.4 Types of communities run by market research companies

	N	33		N	33
A clients brand or product	41%		Consumer	80%	
An area of special interest	43%		Business to business	20%	
Something else	16%				

**Table 4 Types of communities operated**

- Two-fifths of respondents say they are operating communities for their clients’ brands. About the same number are running communities that are for an ‘area of special interest’. The rest are other types of (unspecified) communities.
- The majority (80%) of communities are consumer or personal, and the rest are business-to-business.
- Base sizes are too small to make any comparison on regional or company size.

## 4.5 Software used for communities

We also asked:

**Q. Do you use the same software or different software for communities as for managing panels?**

Of the 32 companies running communities:

- 15 of them use the same software as they use for panels,
- 8 use different software and the remaining
- 9 use some of the same software and supplemented with some other software.

# 5 Software usage and attitudes

## 5.1 Packaged software in use

### 5.1.1 Current year view

- Around two-fifths to a quarter of companies with analysis, CATI, Web and laptop/tablet CAPI software have bespoke tools. A large, but possibly decreasing number are using only custom developments.
- While the majority of companies use only packaged software, a minority use custom software together with packaged software.
- In past surveys we have asked the reasons for custom development, and the principal reasons given are that the market does not provide the kinds of functions required, and also custom development allows companies to differentiate their offering to their customers.
- Given the cost of developing software, we find it surprising that so many companies are using software they have developed themselves, particularly for data collection, where packaged software has been in existence now for many years and there is a huge choice available.
- Where an own-developed solution is used, it is often the *only* system used for data collection modes; whereas for analysis, it one-developed software is mostly used as an alternative to some other, bought software.
- There has been a slight decrease in reliance on own-developed software this year.

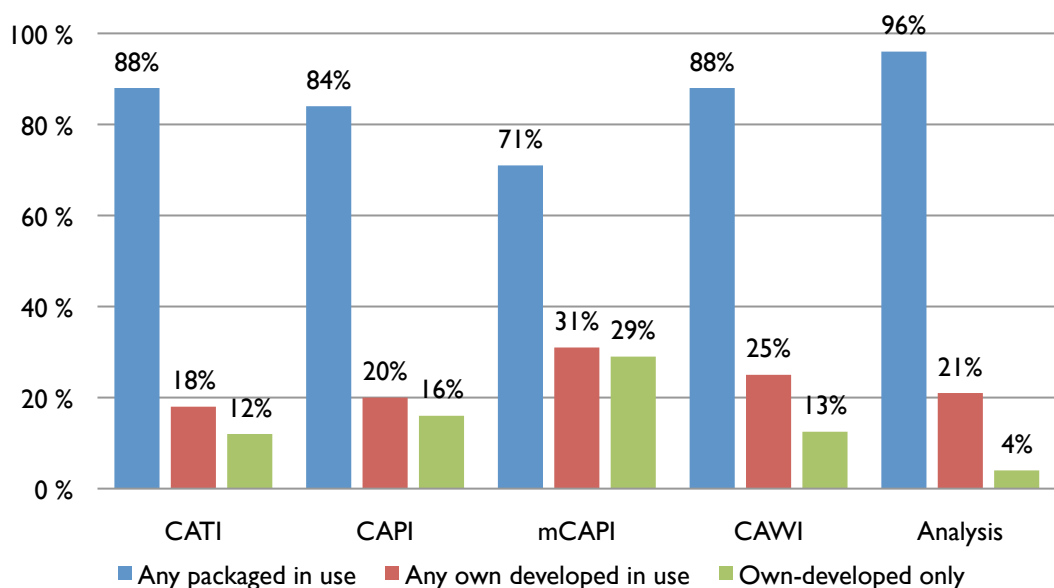


Figure 13 Packaged versus own-developed software in use

## 5.1.2 Five-year trend

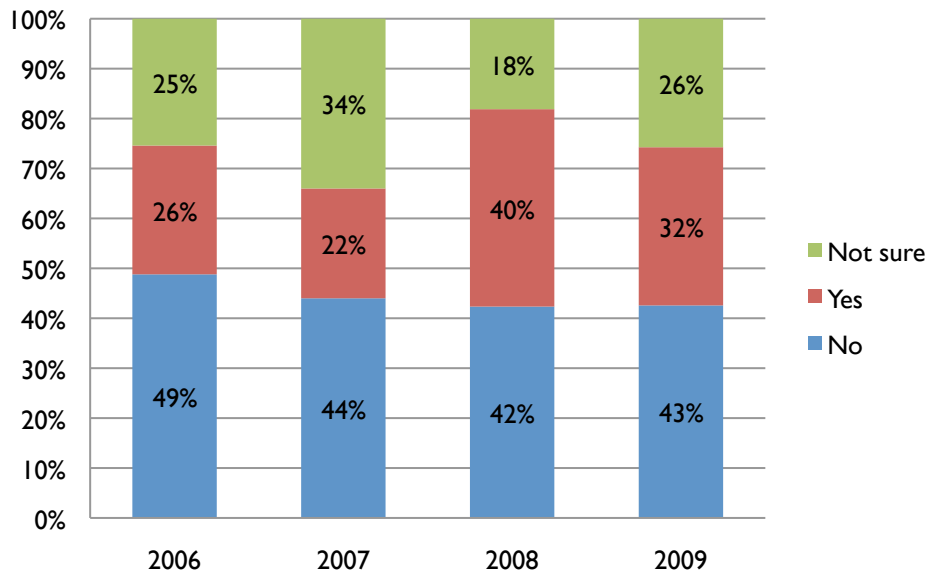
<b>2009</b>	CATI	CAPI	mCAPI	CAWI	Analysis
Any packaged in use	88%	84%	71%	88%	96%
Any own developed in use	18%	20%	31%	25%	21%
Own-developed only	12%	16%	29%	13%	4%
<b>2008</b>					
Any packaged in use	83%	80%	63%	80%	91%
Any own developed in use	26%	29%	37%	35%	29%
Own-developed only	19%	24%	37%	25%	15%
<b>2007</b>					
Any packaged in use	82%	66%	60%	72%	94%
Any own developed in use	26%	26%	43%	26%	24%
Own-developed only	20%	22%	40%	17%	10%
<b>2006</b>					
Any packaged in use	91%	88%		86%	94%
Any own developed in use	14%	22%		21%	16%
Own-developed only	10%	16%		16%	10%

**Table 5 Use of packaged versus own-developed software, 5-year trend**

- The precise number of users reporting using their own-developed software versus purchased, packaged software has varied to some extent year to year, though the overall picture remains fairly constant.
- Overall, we suspect there is a slight downward trend in the use of own-developed software, over the years.
- Some caution is required when examining these figures, as the base sizes are small, and are therefore vulnerable to year-on-year fluctuations - particularly with CAPI and mCAPI, which are minority modes.

## 5.2 Changing software in the next one to two years

We asked companies whether they had plans to change the software they were using for MR in the next one to two years.



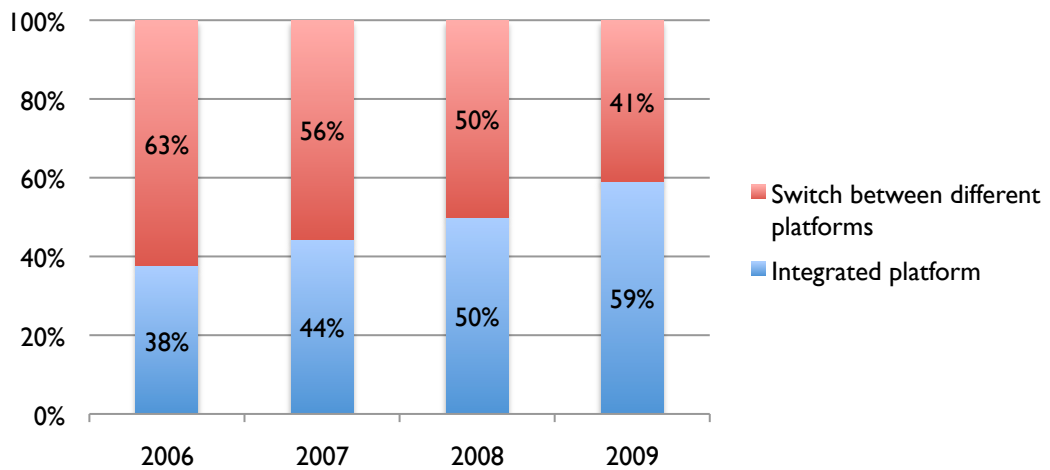
**Figure 14 Plans to change software in the next one to two years, 2006-09**

- It is difficult to detect a pattern in companies' plans to change software, except that the number of companies who are planning to keep their software for one to two years has reduced since 2006, when it was nearly half (49%), but now seems to have stabilized on just over two-fifths (43%).
- In 2009, nearly one third (32%) of companies plan to change their software over the next one to two years. Around another quarter (26%) are undecided. There is no clear trend in these two figures over the years.
- As we have seen in previous years, large companies are more likely to say that they plan to change their software, with over two-fifths (43%) saying 'yes', compared with 31% of small companies and 21% of medium-sized companies.
- Small and medium companies seem to be much more likely to say that they are not changing their software – nearly half (45% of small and 49% of medium-sized companies) have no plans to change.



# 6 Mixed modes

## 6.1 Integrated or separate platforms



**Figure 15 Mixed-mode research, proportion of usage of integrated platforms vs. switching between different platforms**

	Total	N America	Europe	Asia Pac	Small	Medium	Large
<b>N</b>	<b>84</b>	<b>37</b>	<b>39</b>	<b>8</b>	<b>37</b>	<b>25</b>	<b>21</b>
Integrated platform	57%	65%	51%	*	51%	64%	62%
Switch between different platforms	43%	35%	49%	*	49%	36%	38%

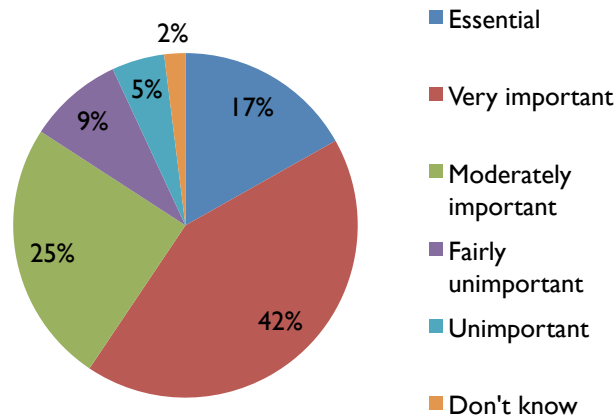
\*Base too small to report

**Table 6 Distribution of integrated platforms by region and company size**

- This study shows that the industry is gradually moving towards using an integrated platform for multimode research. In 2006, 38% used an integrated platform; this has risen slightly each year and was 59% in 2009.
- In 2007 and 2008, there was a far higher incidence in the use of integrated platforms in Europe than in North America. In 2009, the opposite is the case.
- We cannot report on Asia Pacific due to the small base size.

## 6.2 Importance of mixed mode in data collection

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**Figure 16 The importance of multimode data collection**

- The results were broadly similar for all regions and company sizes, although the base was fairly small, so we should not look at these breakdowns in too much detail.
- As in 2008, when this question was first introduced, nearly all respondents (84%) thought that multimode data collection was either essential, very important or moderately important when choosing a new data collection tool. This is clearly food for thought for software developers!

# 7 Sample Sources

## 7.1 Which sources of online sample do you use?

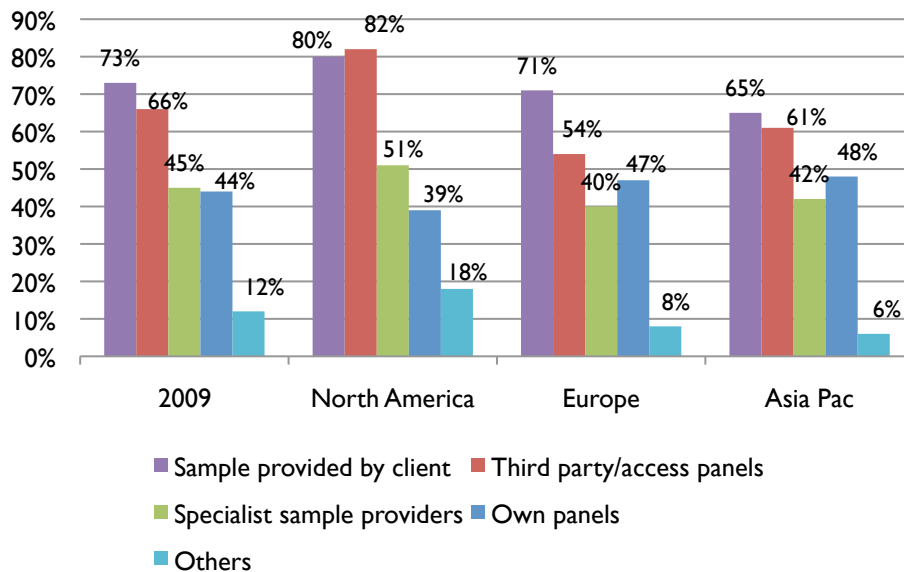


Figure 17 Sample source trends by region

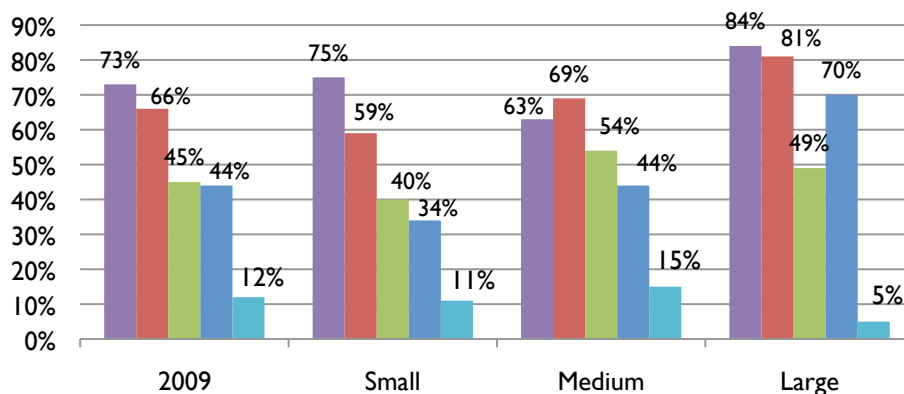
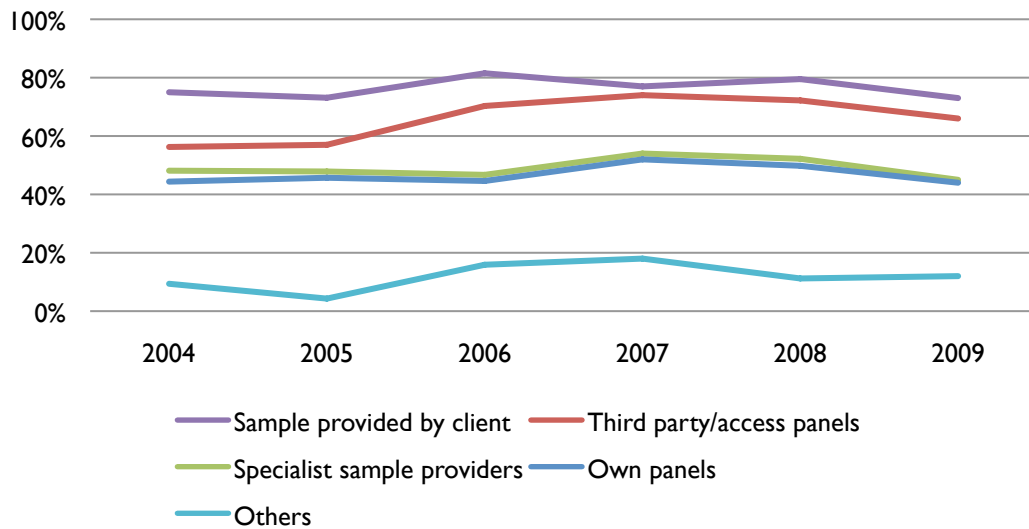


Figure 18 Sample source trends by company size

- The most frequently used source of panel data is that provided by the client. This is closely followed by 3<sup>rd</sup> party/access panels.
- Third party access panels seem to be particularly frequently used in North America, with the majority (82%) using this sample source.
- Specialist sample providers and own panels are used by 40-50% of all companies in all regions.

- There is a marked difference by company size of the use of own panels – around one third (34%) of small companies use them, against more than two thirds (70%) of large companies.

## 7.2 Online sample sources – utilization trends

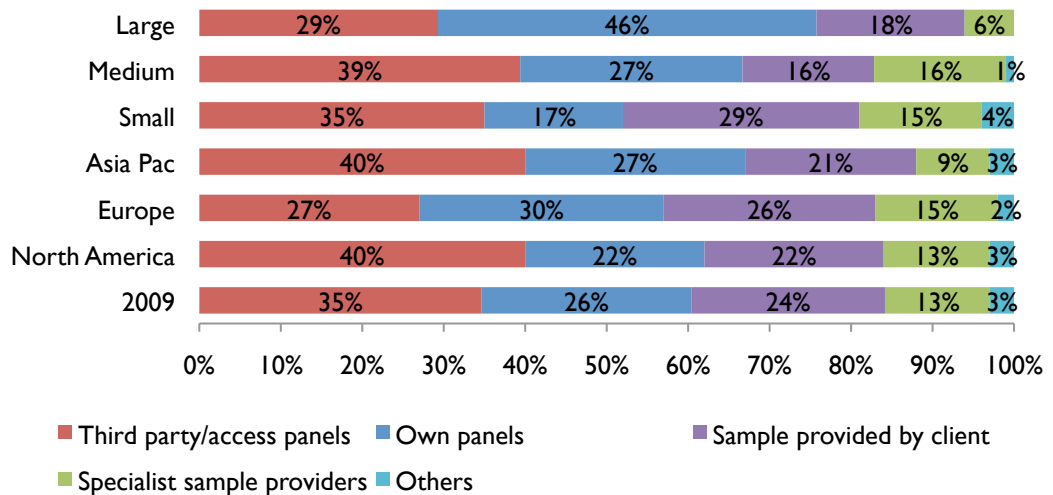


**Figure 19 Sample source trends 2004-09**

- All figures (except 'others') have dipped slightly in 2009. It is too early to see if this is the start of a downward trend, and may be accounted entirely by sample variation.
- In our previous studies, it appeared that access panels were gaining in popularity. This growth seems to have leveled off now. In 2004, 56% used access panels and from 2006 to 2009, this figure has remained at around 70%.
- Market research companies are clearly finding new ways to source sample, since the 'other' group is continuing to play a significant role, although it has reduced in size since 2007.

## 7.3 Sample sources – by volume

We asked respondents not just to tell us which sources they used, but also what the actual volumes were for each mode (in terms of revenue).



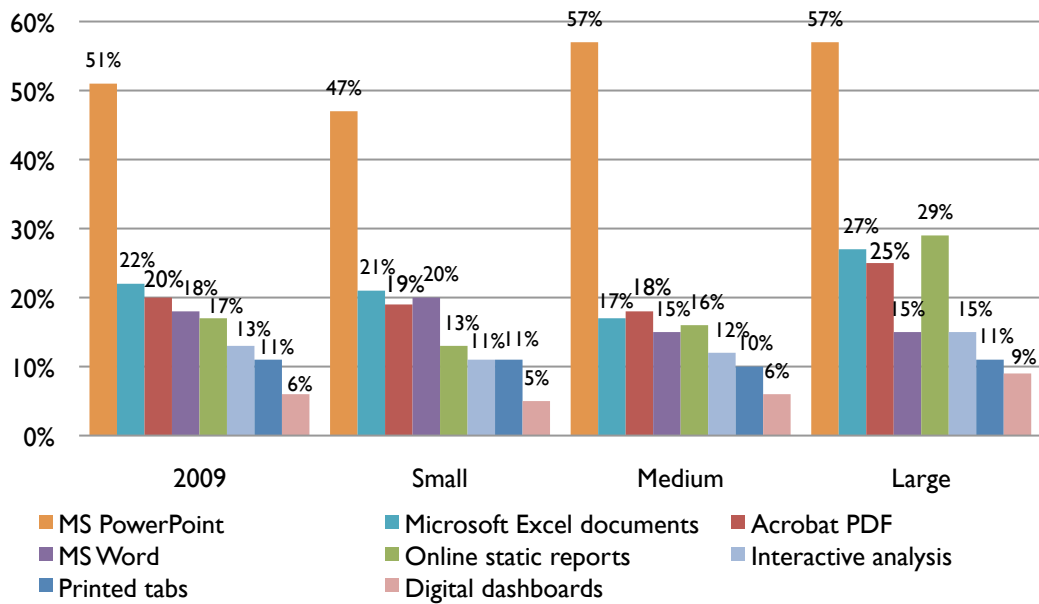
**Figure 20 Sample sources by volume (revenue)**

- In terms of volume, access panels, sample provided by the client and own panels are the most important. Together, these are responsible for most (85%) volume.
- As in 2008, projects with sample from specialist providers contributes a small proportion of volume (13%). This is low considering that nearly half of respondents report using them.
- Firms are favouring their own panels more. A similar number use their own panels, yet the contribution from own panels is much higher, at 26%.
- The results vary considerably by company size. Large firms appear to have invested much more in developing their own panels, judging by the much larger volumes they have shifted to their own proprietary panels: 46%, which is close to half their volumes, against 17% for smaller firms, for whom such investment is obviously more difficult. The overall pattern is little changed from the figures we obtained in 2008.

# 8 Tables and reporting

## 8.1 Distribution methods

**Q: "What percentage of projects currently involve the following deliverables or distribution methods to the client?"**



**Figure 21 Share of projects using each distribution mode, by company size**

- As in 2006, 2007 and 2008, PowerPoint slides continue to be the outright most popular deliverable in 2009, for all parts of the world and all sizes of company. The percentage of projects using them has remained unchanged at around 50%
- Overall the pattern is very much the same in all regions and across company sizes. The only small exception is that large companies seem to make more use of online static reports than others, although this could be 'blip' since in 2008 it was medium-sized companies that made more use of them.

### 8.1.1 Four-year trend

- The use of Word, printed tables and Acrobat pdf files decreased notably between 2006 and 2007. These figures have not changed so much between 2007 and 2009.
- However, the use of online static reports rose from 2006 to 2008, but in 2009 dipped down again
- The use of interactive analysis has remained virtually static. It seems that although there is a gradual shift towards online static reports, interactive analysis is still not experiencing any growth.

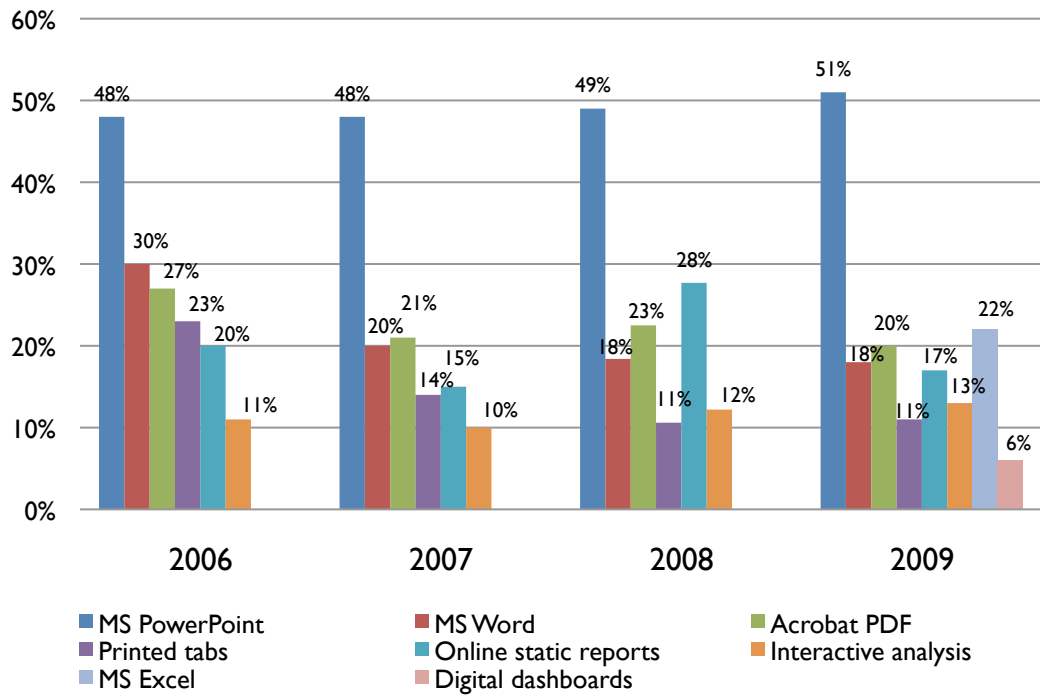


Figure 22 Percentage of projects using each distribution mode 2006-09

## 8.2 How important are printed cross tabs?

- It is clearly too soon to forecast the demise of the printed reports – with most respondents considering them essential or moderately important. There has not been any noticeable change in the responses to this question since 2004.
- Though cross-tabs are still considered important, the previous question has shown that the cross-tab is now a minority *delivery method* and is the exception rather than the norm in many contexts.

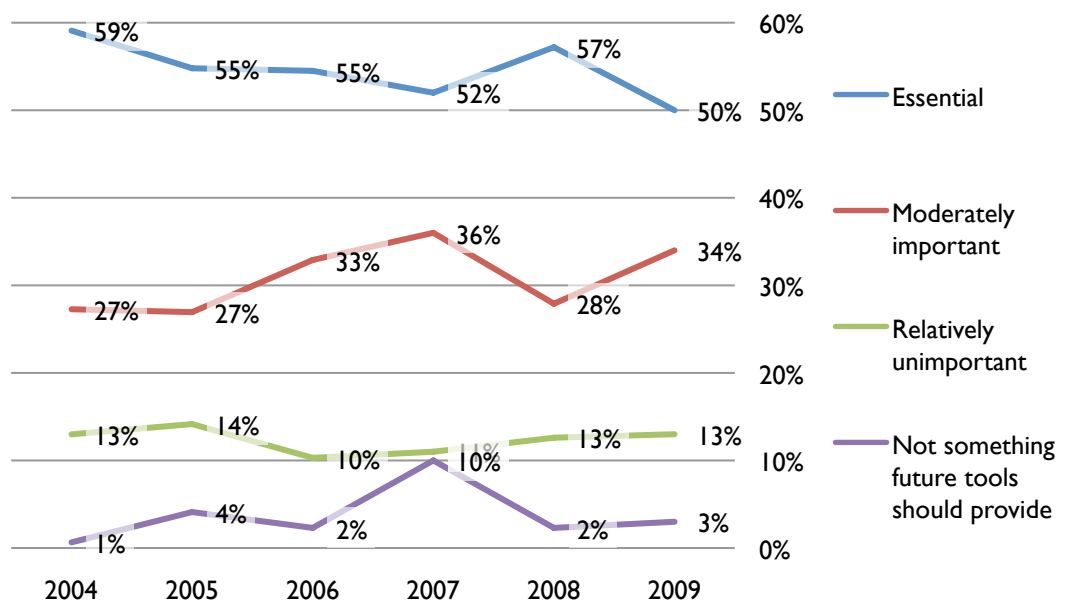


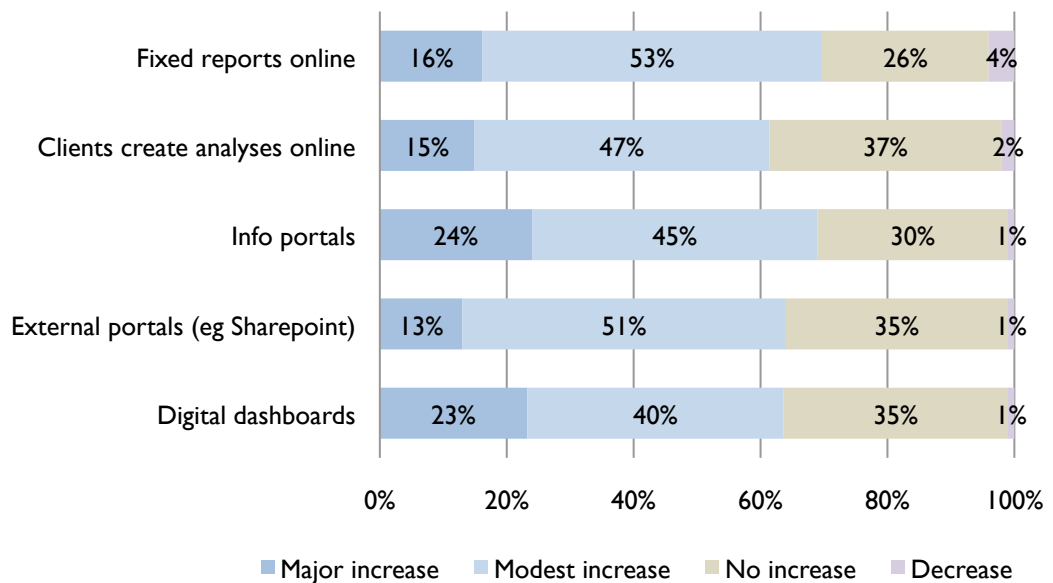
Figure 23 The importance of printed cross tabs 2004-09

## 8.3 Future demand

### Q “Over the next year to what extent do you anticipate an increased demand in...?”

The specific delivery methods we asked respondents about were as follows:

1. Online delivery of fixed reports, including cross-tabs and charts which are automatically updated
2. Ability for clients to create their own tables and charts online
3. Ability to provide information portals that integrate research data with data from other sources
4. Ability to deliver charts and tables into external portals (ie, Sharepoint)
5. Digital dashboards (dials or traffic light-style reporting) for high-level scores or KPIs



**Figure 24 Changes in demand for new ways of delivering results – overview**

	Online static reports	Inter-active tabs/chart creation	Integrated research portals	Delivery to external portals e.g. Sharepoint	Digital dashboards
<b>N</b>	<b>178</b>	<b>178</b>	<b>178</b>	<b>178</b>	<b>178</b>
Major increase (2)	16%	15%	24%	13%	23%
Modest increase (1)	53%	47%	45%	51%	40%
Net increase	70%	62%	69%	63%	63%
No increase (0)	26%	37%	30%	35%	35%
Decrease (-1)	4%	2%	1%	1%	1%
Mean Score	0.8	0.8	0.9	0.8	0.9
Std. Deviation	0.75	0.72	0.76	0.69	0.78

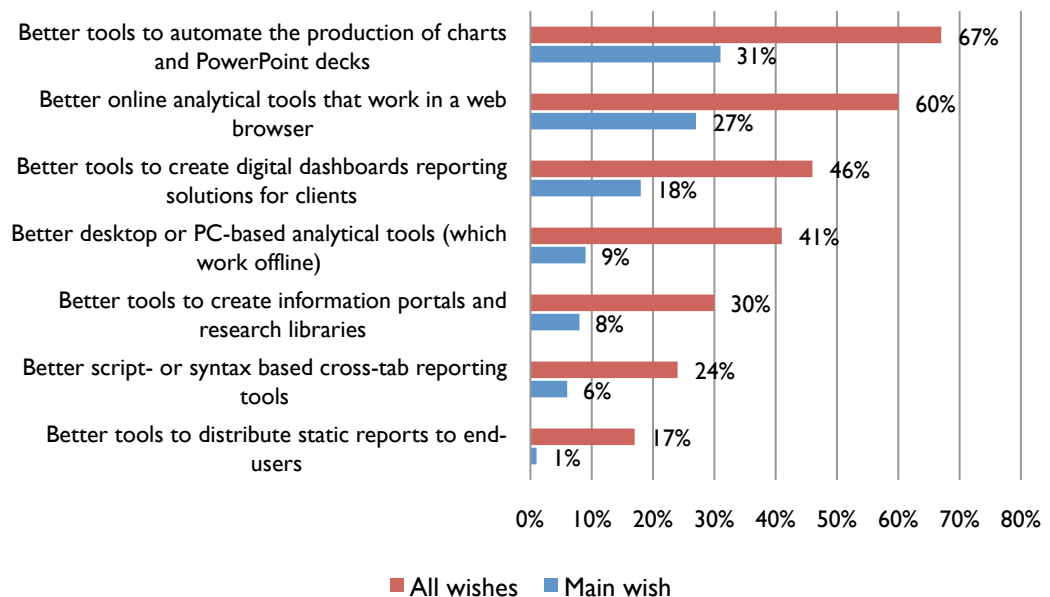
**Table 7 Predicted demand for new result delivery methods**

- The respondents predict all types of online reporting to grow over the coming year. For each type of online reporting, over 60% of respondents think there will be an increase in demand.



- With each reporting method, between about a quarter and just over a third of respondents think there will be no change, but virtually none think there will be a decrease.
- There is little regional variation.
- Looking at company size (below), large companies expect a greater increase in demand than small and medium-sized companies in every area of online reporting. For example, 97% of large companies predict an increase in demand for external portals, whereas 55% of small companies predict this.
- It is also quite noticeable that the large companies are expecting the largest increase in demand in the most high-tech areas, such as portals, and the smallest increase in demand in the least technically demanding delivery methods, such as fixed online reports.

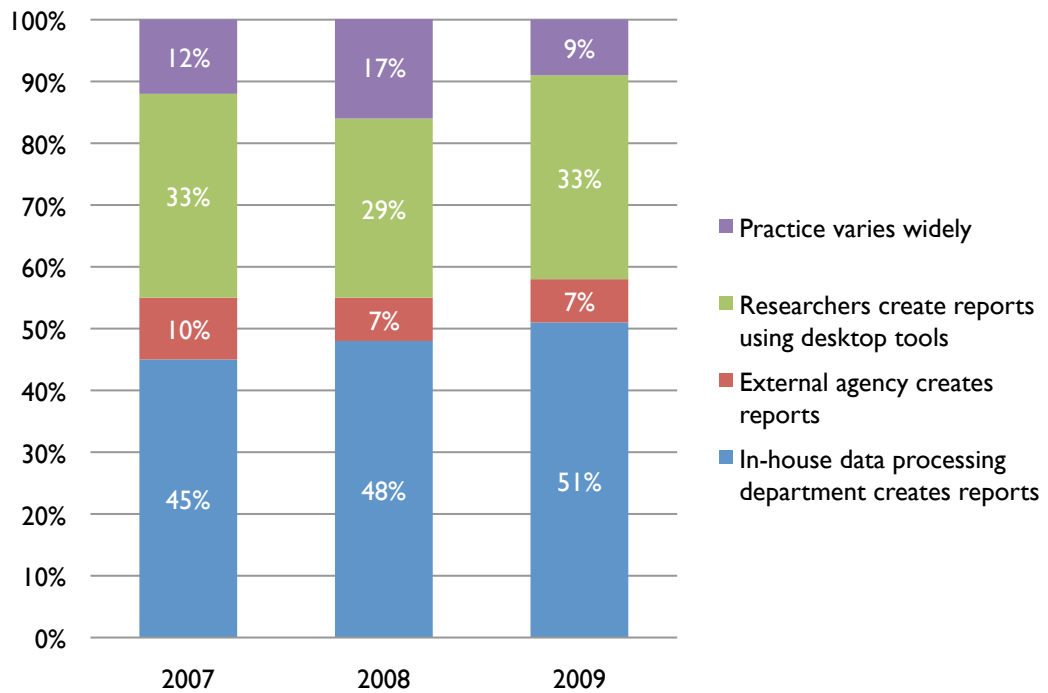
## 8.4 Future wishes for analysis and reporting tools



**Figure 25 Future wishes for analysis and reporting tools**

- The results in 2009 are very similar to those in 2008.
- ‘Better tools to automate the production of charts and PowerPoint decks’ is by far the most popular wish. Nearly one third of the respondents chose it as their top priority, and nearly two-thirds said that it is one of their wishes.
- ‘Better online analytical tools that work in a web browser’ is the second most popular wish, with nearly three out of ten (27%) choosing it as their main wish and six out of ten (60%) selecting it as one of their three wishes.
- ‘Better desktop or PC-based analytical tools’ and ‘better tools to create information portals’ are also a popular wishes in 2009, with 46% and 41% selecting these as one of their wishes, and 18% and 9% of respondents selecting them as their top priority.

## 8.5 Variations in analysis and reporting practice



**Figure 26 Analysis and reporting practices by region and company size**

- Overall, the results have changed very little since 2007. There is possibly a gradual trend towards in-house data processing and away from external agencies, but it is too gradual a shift to be sure at this stage.
- Data analysis is still predominantly carried out by specialists (58% overall), with in-house accounting for most of that (51%) and bureau work the rest (7%).
- Though 33% of analysis is done by researchers themselves, it is much more common in small firms (43%) and less common in large companies (11%) – and this gap has widened since 2008. Large companies are far more likely to use in-house specialists for analysis and reporting (69%), compared with 43% at small companies.
- Practice varies little by region.

# 9 Analysis of sample

## 9.1 Key demographics

The two principal demographics which we are using to profile the results are **company size** and **global region**, as these are the most influential on behaviour. We have used these to identify differences throughout this report, and we actively sampled using these demographics during the fieldwork in order to ensure they would be well balanced in the achieved sample.

Each region is well represented in relation to the number of research companies operating in those markets. However, there are only 31 respondents in Asia Pacific, so we therefore advise caution in interpreting some of the less emphatic differences between Asia Pacific companies and the others.

Company size is well distributed across the three global regions.

	Total		Small		Medium		Large	
Total	188	100%	96	100%	52	100%	37	100%
North America	74	39%	35	36%	24	46%	14	38%
Europe	83	44%	50	52%	17	33%	14	38%
Asia Pacific	31	16%	11	11%	11	21%	9	24%

**Table 8 Respondents by region and company size**

'Small' is intended to reveal the different needs of companies unlikely to have specialist in-house technical staff. The smaller proportion of companies in the 'large' (or over \$25m turnover) category is only a reflection of the 'pyramid' that exists of company size, with a smaller number of large companies globally.

### 9.1.1 Countries Covered

31 countries are represented in the 2009 survey and are as listed below. This is more than in previous years.

We were very keen to ensure that our sample was geographically as representative as possible. To achieve this, we examined the turnover figures of the market research industry per country, as listed by ESOMAR<sup>1</sup>.

The survey was translated into French, German and Japanese.

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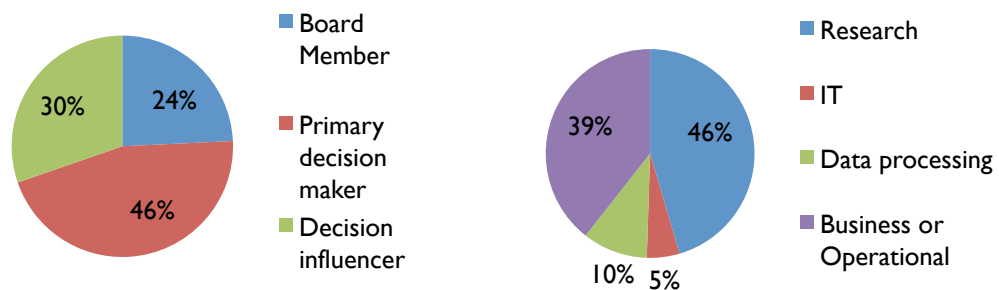
<sup>1</sup> ESOMAR Global Market Research report, 2009.

Total	188	100%			
USA	60	32%	Portugal	1	1%
UK	28	15%	Turkey	1	1%
Germany	23	12%	Poland	1	1%
Canada	14	7%	Russia	1	1%
France	7	4%	Bulgaria	1	1%
Australia	7	4%	Ireland	2	1%
Sweden	5	3%	Romania	1	1%
India	6	3%	New Zealand	2	1%
The Netherlands	3	2%	Hong Kong	2	1%
Switzerland	3	2%	Malaysia	2	1%
Japan	3	2%	Thailand	2	1%
China	3	2%	Singapore	1	1%
Italy	2	1%	Philippines	1	1%
Norway	1	1%	Indonesia	1	1%
Denmark	1	1%	Vietnam	1	1%
Belgium/Luxembourg	2	1%			

**Table 9 Respondents by country**

## 9.2 Seniority and area of responsibility

The objective to conduct the survey among opinion formers: senior managers and board members, wherever possible. This was successfully achieved, as can be seen from the charts below, which show that over two-thirds (69%) of the sample were either at board level or were primary decision makers for software and technology issues:



**Figure 27 Respondents' levels and areas of responsibility**

We were also concerned to ensure that the survey was not taken only by technical staff (IT or DP) but emphasized those with research and business/operational responsibility and expertise too. With 15% of the sample considering themselves to be technical specialists, the survey is not overly biased towards a technocentric view; 46% had research responsibilities and 39% business and operational responsibilities.

Overall, we are confident that the sample, as completed, forms a representative cross-section of the professional market research community and is not unduly influenced by any particular subgroup.