

# The 2008 *Confermit* Annual Market Research Software Survey

## Report and Key Findings

*Sponsored by Confermit*



*Research by meaning ltd*

*Report authors: Tim Macer and Sheila Wilson*

**January 2009**



**meaning**

The City Business Centre, 2 London Wall Buildings  
London EC2M 5UU, UK

Tel. +44 (0)20 3291 2930

Fax +44 (0)20 3291 2935

Web [www.meaning.uk.com](http://www.meaning.uk.com)

# Contents

<b>Introduction and Key findings</b>	<b>4</b>
About the 2008 Conformat MR Software Survey .....	4
New questions.....	4
Trends.....	5
<b>1 Current and predicted activity</b>	<b>7</b>
1.1 Quantitative v. qualitative .....	7
1.2 Research modes cited (penetration).....	7
1.3 Research modes by volume .....	9
1.4 Predicted changes in interviewing mode.....	10
1.5 Industry challenges .....	11
<b>2 Technology trends and challenges</b>	<b>12</b>
2.1 Technology challenges.....	12
2.2 Dialing.....	12
2.3 Web 2.0 user generated content.....	14
<b>3 Software usage and attitudes</b>	<b>16</b>
3.1 Packaged software in use.....	16
3.2 Changing software in the next one to two years .....	17
3.3 Reasons for considering a change in software.....	18
<b>4 Mixed modes</b>	<b>20</b>
4.1 Integrated or separate platforms .....	20
4.2 Level of mixed mode or multimode capabilities required .....	20
4.3 Reasons for mixed mode research.....	21
4.4 Importance of mixed mode in data collection.....	21
<b>5 Sample Sources</b>	<b>22</b>
5.1 Online sample sources – utilization trends .....	22
5.2 Sample sources – by volume.....	23
<b>6 Tables and reports</b>	<b>24</b>
6.1 Distribution methods .....	24
6.2 How important are printed cross tabs? .....	25
6.3 Future demand.....	25
6.4 Future wishes for analysis and reporting tools.....	26
6.5 Variations in analysis and reporting practice.....	27
<b>7 Analysis of sample</b>	<b>28</b>
7.1 Key demographics .....	28
7.2 Seniority and area of responsibility .....	29
7.3 Detailed analysis of the demographics.....	30

## Figures

Figure 1 Research activities undertaken: % volume at each company.....	7
Figure 2 Percentage of market research firms using each mode of research.....	7
Figure 3 Research modes by volumes (% of revenues).....	9
Figure 4 Research modes by volume: three year trend.....	9
Figure 5 Predicted growth or decline in volumes of research by mode.....	10
Figure 6 Industry challenges.....	11
Figure 7 Technology challenges.....	12
Figure 8 Dialling modes required in future compared with present.....	13
Figure 9 Reasons for not using predictive dialling.....	13
Figure 10 The importance of Web 2.0 features.....	14
Figure 11 The use of packaged and in-house software.....	16
Figure 12 Plans to change software in the next one to two years (2008).....	17
Figure 13 Plans to change software: three year trend.....	17
Figure 14 Types of software planning to change.....	18
Figure 15 Reasons for conducting mixed mode research.....	21
Figure 16 The importance of multimode data collection.....	21
Figure 17 Sample source trends 2004-08.....	22
Figure 18 Revenues by sample source.....	23
Figure 19 Percentage of projects using each distribution mode 2006-08.....	24
Figure 20 The importance of printed cross tabs 2004-08.....	25
Figure 21 Changes in demand for various ways of delivering analyses – overview.....	26
Figure 22 Future wishes for analysis and reporting tools.....	26
Figure 23 Analysis and reporting practices by region and company size.....	27
Figure 24 Respondents' levels and areas of responsibility.....	29

## Tables

Table 1 Integrated platform or switch between platforms for multimode research..	20
Table 2 Level of mixed mode capabilities required.....	20
Table 3 Respondents by region and company size.....	28
Table 4 Respondents by country.....	29
Table 5 Sample analysis: responsibility by global region and company size.....	30

# Introduction and Key findings

## About the 2008 Conconfirm MR Software Survey

Welcome to this report of the results of the fifth annual market research software survey. The survey is carried out among a balanced sample of software and technology decision makers and decision influencers within research companies worldwide. It provides a unique snapshot of the key issues and trends affecting technology. The research is commissioned Conconfirm, one of the major providers of market research software and related services, who generously place the findings of this research public into the public domain, as a service to the research profession. The research is carried out according to confidential research principles by meaning limited, who are independent analysts and specialists in the research technology sector.

You may find out more about Conconfirm by visiting [www.conconfirm.com](http://www.conconfirm.com) and its range of integrated research software products, where further copies of this report and the previous annual reports may be downloaded free of charge.

You may find out more about meaning and the services it provides by visiting [www.meaning.uk.com](http://www.meaning.uk.com).

Highlights of this report are also published in leading industry publications such as Quirk's Marketing Research Review in the USA and Research magazine in the UK.

You are free to make reference to any of the results presented here, however we ask that you make reference to both Conconfirm, as sponsor, and meaning ltd, as the research provider, when attributing the source (e.g. 'from the 2008 Conconfirm MR Software Survey carried out by meaning ltd).

## New questions

This year we asked some new questions about dialing methods with CATI and also about the use of Web 2.0 technologies (which enable respondents to generate various types of unstructured content, such as video recordings and blogs). In addition, we expanded our questions about the reasons to change software to see if there was any difference in the reasons depending on software type. We also asked about the technology challenges facing the industry.

- The majority of CATI users use some form of automated dialing: 33% of MR firms use autodialing and 23% with predictive dialing 39% reported using manual dialing. A modest growth in predictive dialing is anticipated in the next 12 months.
- The commonest reasons for not using predictive dialing are 'we would not achieve savings due to the types of call we typically make (e.g. business to business)' and 'we have concerns about nuisance calls'. Over 40% of CATI users cited these two reasons.
- With respect to Web 2.0, the industry seems to divide into innovators and traditionalists, with between 7% and 20% responding that they were already using each of the six Web 2.0 research approaches covered, while typically double the amount saw no requirement for these novel methods.

- Analysis of unstructured text stood out as the Web 2.0 issue most were finding problematic – a third said they ‘need it but find it difficult’ and another third expect to need it in the future.
- A much smaller proportion were either successfully doing or trying to do interviews with video or audio prompts, however 49% state they may want to do this in future.
- For most of the other new Web 2.0 questions, just under half of the respondents said ‘may want in the future’, showing that there is likely to be big potential in this area.
- This year, we separated out the reasons for wishing to change software by each product category. While the main reason for most of the categories was consistently ‘Seeking more flexibility, more capabilities or better functionality’, for data processing, the leading reason was ‘to move to a more modern platform’.
- ‘Achieving efficiency improvements’ was a notable concern in switching for data processing software and also report publishing and delivery software; whereas for data collection software, ‘Consolidate all activities on a single integrated platform’ was the big concern after flexibility.
- Respondents were remarkably united about which was the main technology challenge facing them. Nearly three-fifths chose ‘automating regular and repetitive aspects of the research process’ as one of their three issues and over a quarter (26%) selecting it as their main issue.

## Trends

- Falling response rates remains the main challenge faced by the industry – the same as in 2007.
- Web research has grown in the last three years, and it appears to be at the expense of PAPI, not CATI, which is holding up well. Web now accounts for 48% of quant work done and seems have grown at the expense of PAPI, not CATI. CATI has remained within a percentage point of 26% in all three years, whereas paper has drifted down from 21% in 2006 and 19% in 2007 to 14% in 2008.
- The three modes of CATI, CAPI and PAPI account for 88% of quant revenues – a figure that has changed little over the last 3 years.
- Most respondents are still expecting Web research to grow, with over 80% predicting modest or major growth.
- SMS remains a niche: only 4% of companies are doing it – and predominantly among large companies (11%).
- For the first time this year, we have observed a leveling of the use of Web surveys in all three global regions studied: the USA is no longer leading.
- The use of ‘own specially developed’ Web and analysis software appears to have increased since 2007, in particular with Web software. For 25%, the in-house software is the principal tool their company uses for Web interviewing, up from 17% the previous year and 16% in 2006. Given the large costs involved in software development, we continue to be surprised at these figures.
- The main reason for going in-house is that ‘the software on the market does not have the functionality we need’, as in 2007.
- The number of companies who say they are going to change their software has risen from 34% in 2007 to 39% in 2008. There appears to be an undercurrent of dissatisfaction with the software it uses, which conversely presents many opportunities to developers.

- There has been a modest but steady rise in firms doing mixed mode, by a few percentage points each year since 2006 (when we first asked this), to 45% today. Mixed mode not involving CATI has grown nearly four points over the three years to 16.7%.
- Online delivery of static reports is growing while the printed table is in decline and online cross tabs remains flat. Online static reporting it is now used for 28% of projects, up from 20% in 2006. Tables printed on paper has declined from the delivery method for 23% of projects in 2006 and 13.6% in 2007 to just 11% now.
- Delivery in Word has collapsed from 30% in 2006 to 18% now. PowerPoint continues to dominate and has remained within half a point of 48% by volume in all three years.

# I Current and predicted activity

## I.1 Quantitative v. qualitative

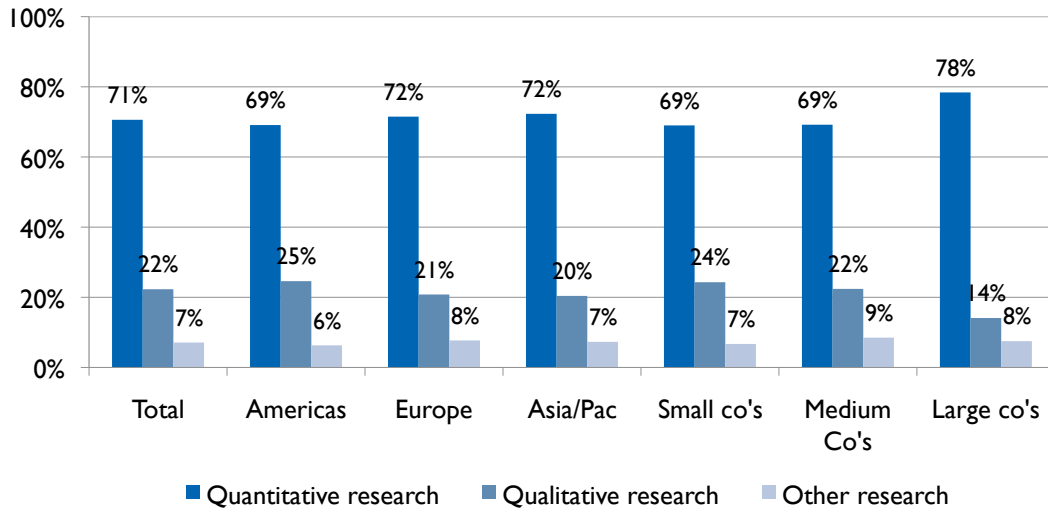


Figure 1 Research activities undertaken: % volume at each company

- Between two thirds and three quarters of research revenues are quantitative – and this figure is much the same for all regions. Larger companies appear to differ slightly in that those in this study are deriving a greater proportion of their revenue from quantitative and less from qualitative research

## I.2 Research modes cited (penetration)

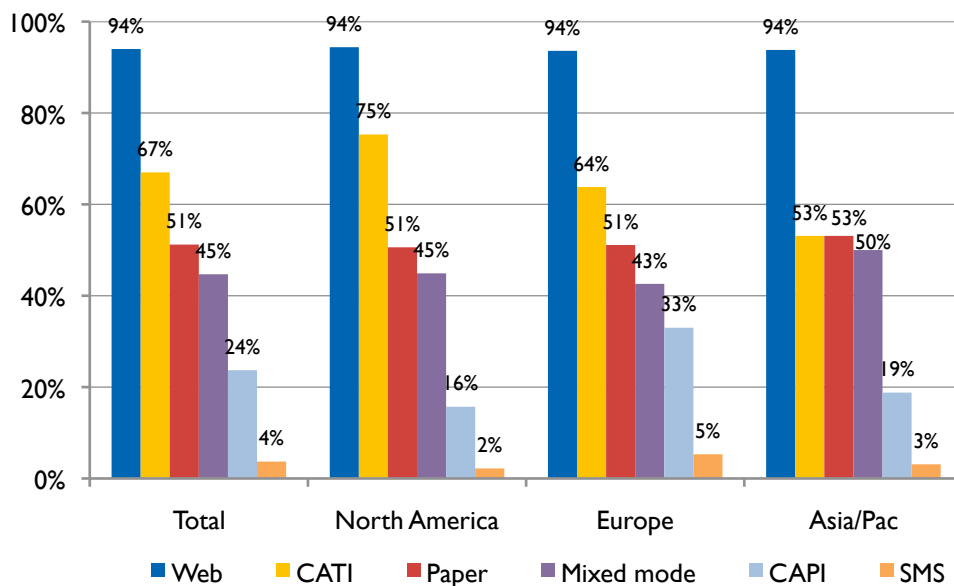


Figure 2 Percentage of market research firms using each mode of research

- 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. There has been a steady increase in Web usage over the last four years with the corresponding figures for 2004, 2005, 2006 and 2007 being 81%, 85%, 87% and 91% respectively.
- CAWI as a method is now established and ubiquitous. This year, it is striking that the incidence of Web usage is the same in each region of the world. In previous years, either Europe or Asia Pacific has lagged significantly behind
- The number of companies using CATI has decreased by 5% since last year, but looking at the last three studies together, it can be seen that there is no upward or downward trend and the figures are all around 70% (67% in 2008, 72% in 2007 and 70% in 2006).
- This year, there has been a large reduction in the number of companies conducting paper research. In 2007 nearly two-thirds (63%) of firms in this study offered paper as one of their data collection modes, but in 2008 this has reduced to half (51%).
- The number of companies including CAPI in their offering seems also to be in decline with 24% in 2008, against 32% and 30% in 2007 and 2006 respectively. We do not feel that the CAPI results for North America and Asia Pacific should be scrutinized too carefully due to the small sample sizes – 14 for the former and 9 for the latter.
- This study has detected a possible gradual upward trend towards mixed mode research, with 45% of this year's respondents 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.
- Mixed mode may have grown fast in Asia Pac since 2007, with 50% of companies there offering this service in 2008 compared with 39% in 2007. However, the sample is small in this region so the numbers need to be treated with caution.
- This year it is noteworthy that, while only eight companies are using SMS at all, five of these are among the 46 large companies in our sample. In trend terms, demand for SMS seems to be flat, previous tallies were 6% in 2005, 3% in 2006 and 4% both in 2007 and 2008. However, the result for large companies does make us wonder if larger companies are starting to explore SMS research more.

### I.3 Research modes by volume

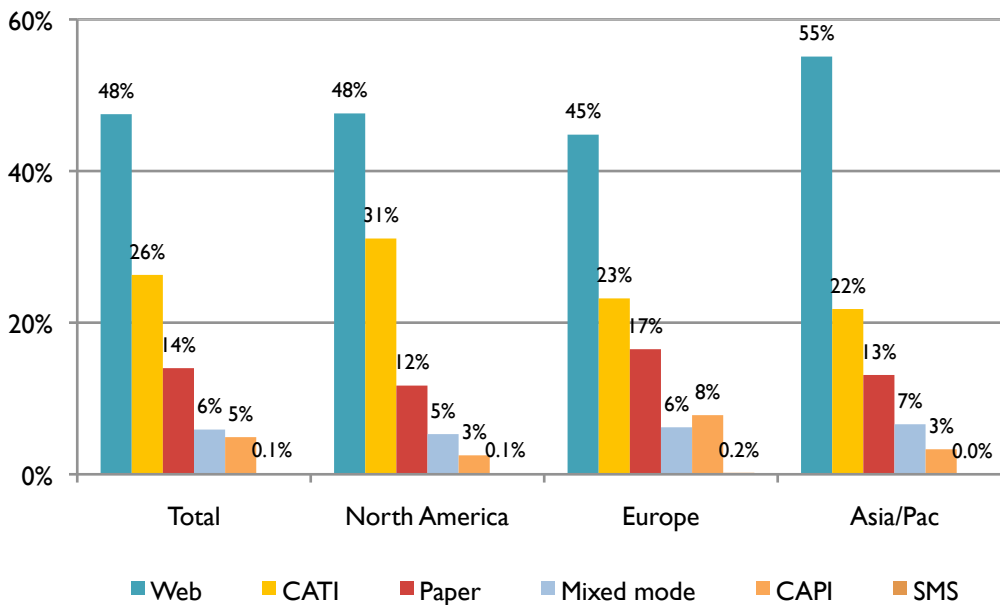


Figure 3 Research modes by volumes (% of revenues)

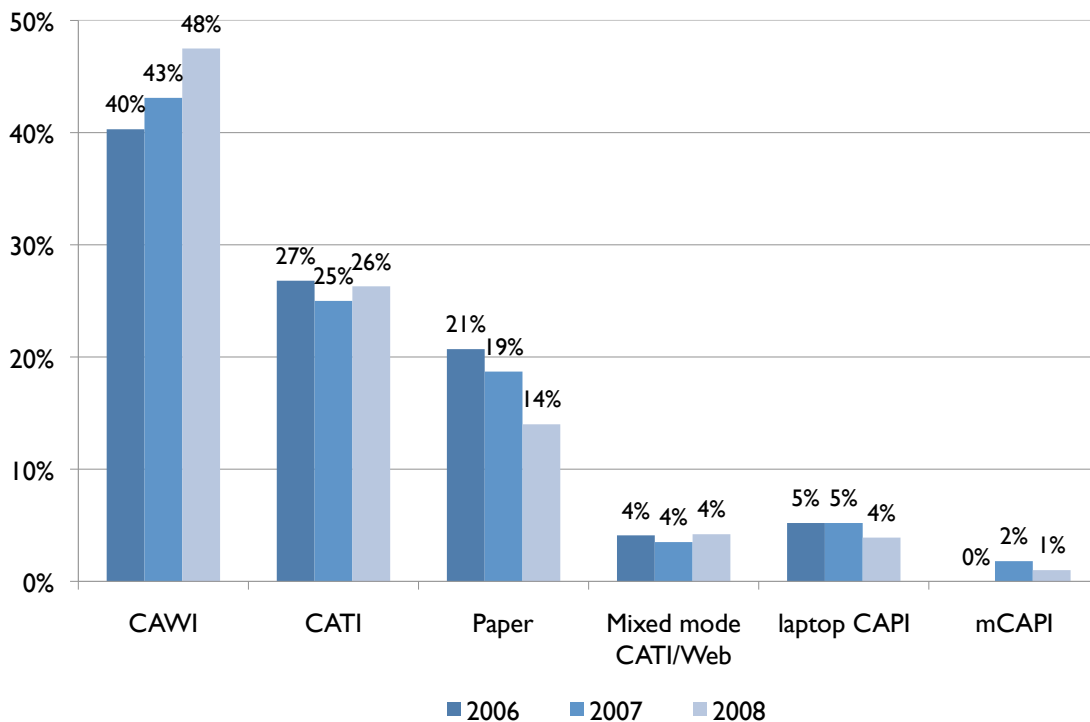
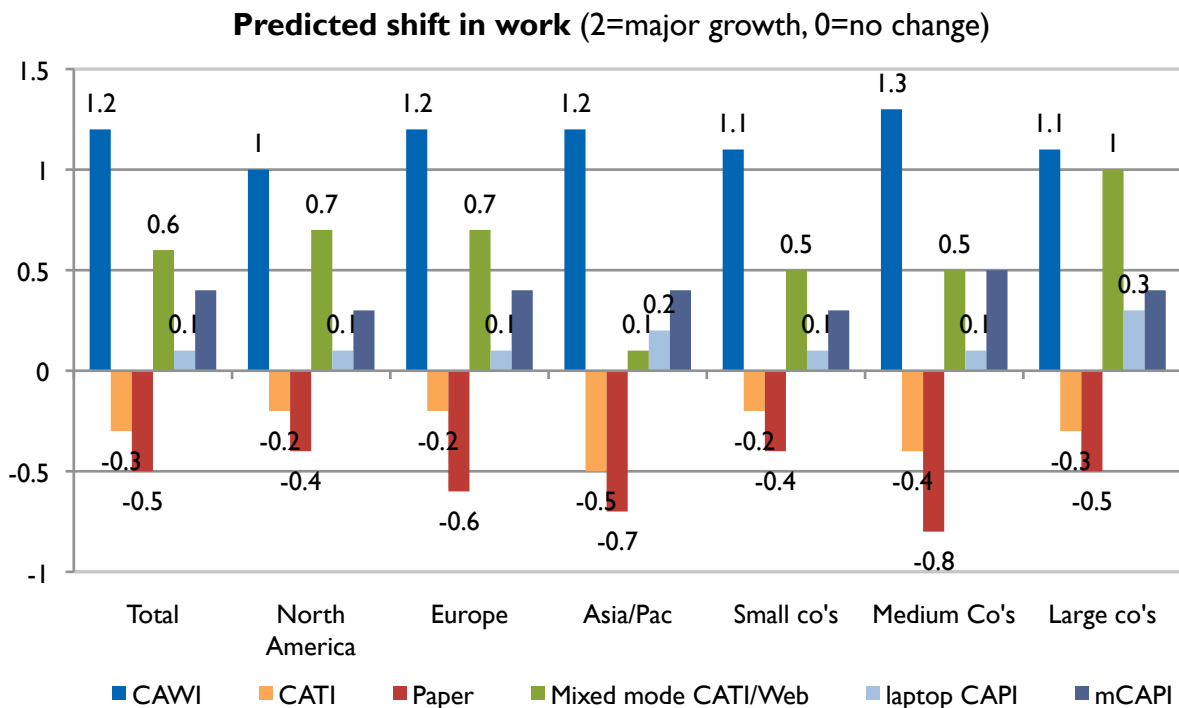


Figure 4 Research modes by volume: three year trend

- Web research has grown in the last three years, and it appears to be at the expense of PAPI, not CATI. Web now accounts for 48% of quant work done, up from 43% in 2007 and 40% in 2006. CATI has remained within a percentage point of 26% in all three years, whereas paper has drifted down from 21% in 2006 and 19% in 2007 to 14% in 2008. Other modes are relatively unchanged.
- Looking at the world as a whole, Web studies are the biggest source of revenue for MR companies and this has been increasing as the years pass

- Web, CATI and paper together are the source of most (88%) of the revenues from quantitative work.
- For the world as a whole, mixed mode research represents 6% of revenues, as it did in 2007. 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. (see section 1.2)
- Similarly laptop and tablet CAPI provides a low proportion of the income (4%) compared with the number of companies who use it (24%). Although, as stated above, the number of companies offering CAPI seems to be in decline, so its relatively small contribution to revenues may be a factor in this reduction.
- 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.

## 1.4 Predicted changes in interviewing mode



**Figure 5 Predicted growth or decline in volumes of research by mode**

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 major growth area over the next three years
- Mixed mode (CATI and Web), mobile CAPI, SMS, and 'other self completion using mobile devices' are expected to show a very modest growth. The growth of the former is consistent with the results above in sections 1.2 and 1.3. The other modes are currently such minority areas that it is hard to comment much further.
- Large companies seem to be slightly more optimistic about mixed mode research than other companies. They predict an average growth of 0.7 for mixed mode CATI and Web, and 0.3 for other mixed mode, whereas looking at all companies, the predictions are 0.5 and 0.1

- A very modest decline in CATI is predicted.
- A larger contraction in paper work is predicted, and this is consistent with the results above in sections 1.2 and 1.3.
- For the sake of clarity, we have omitted three modes in the above chart, since no change or almost no change was predicted. These modes are: IVR, 'other' mixed mode, and laptop or tablet CAPI.

## 1.5 Industry challenges

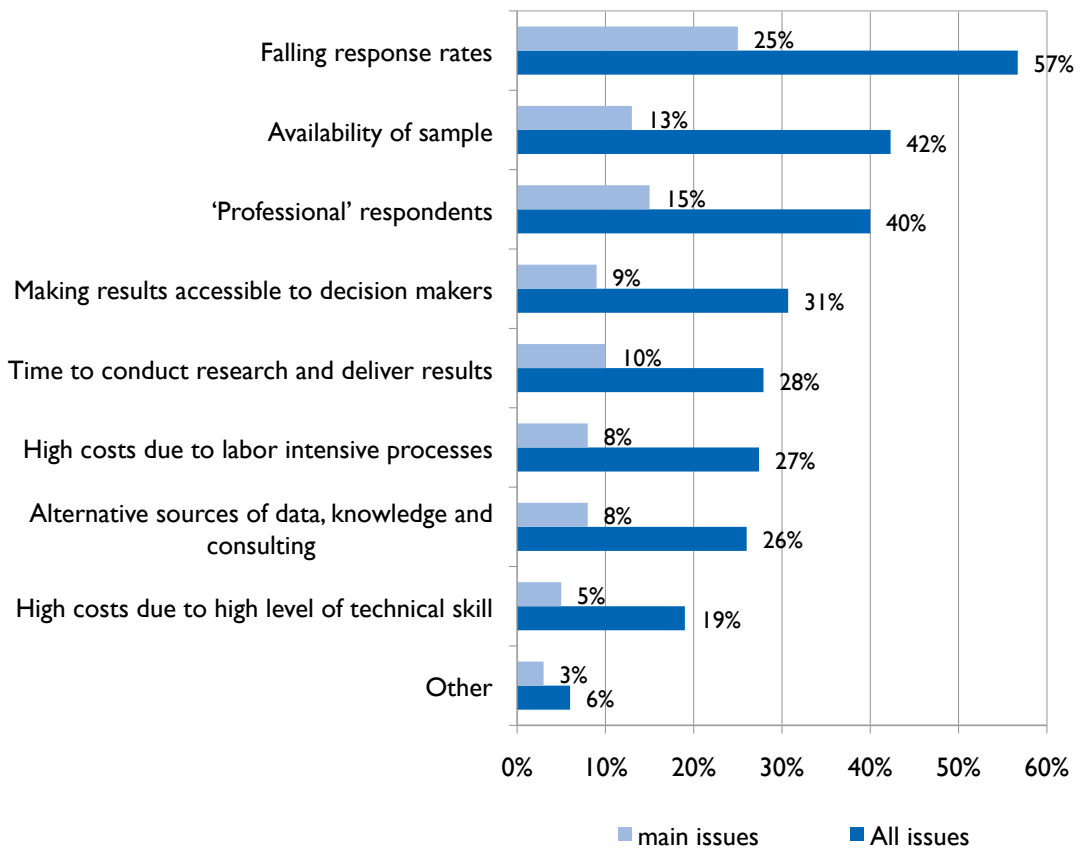


Figure 6 Industry challenges

### Q: “What are the major challenges facing the research industry that technology should address or attempt to resolve?”

- The issue of falling response rates is the challenge that was most often mentioned by the respondents. Well over half of them included this issue as one of their three major challenges and a quarter selected it as the most important challenge.
- The next two issues received fairly equal ratings, with two-fifths of respondents mentioning them and between 13% and 15% of them citing them as the most important challenge – they were ‘professional’ respondents and availability of sample.

## 2 Technology trends and challenges

### 2.1 Technology challenges

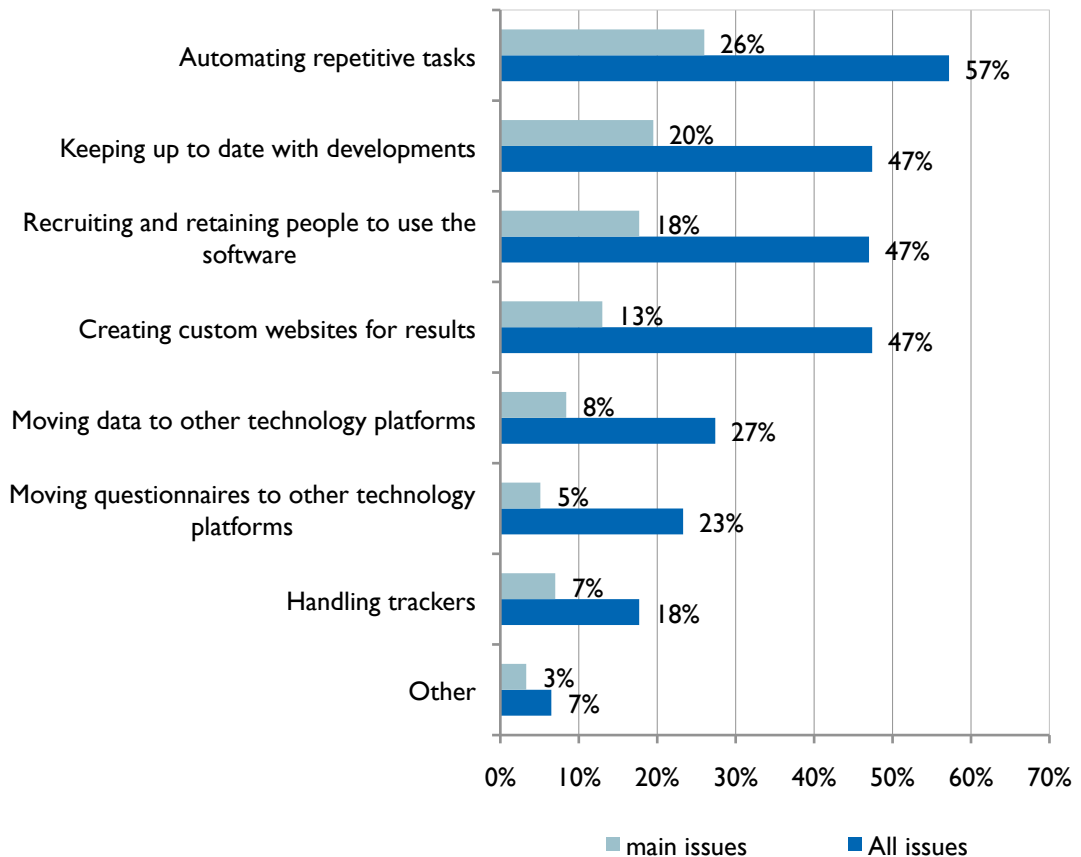


Figure 7 Technology challenges

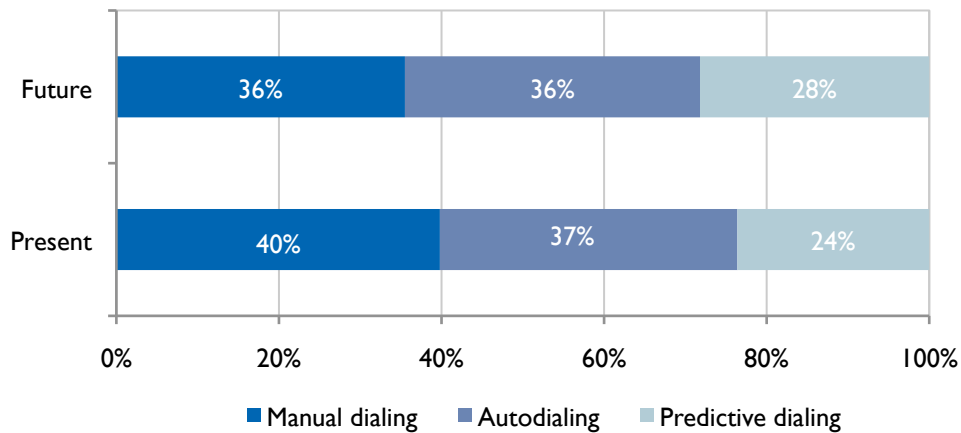
- 'Automating regular and repetitive aspects of the research process' was by far the most frequently selected challenge, with nearly three-fifths choosing this as one of their three issues and over a quarter (26%) selecting it as their main issue.
- Just under half chose the following three reasons as one of their three issues: 'keeping up to date with the latest developments', 'recruiting and retaining people with the right mix of technical and research skills to use the software or to write scripts' and 'creation of custom websites for results or data delivery to clients'.

### 2.2 Dialing

In this year's study we asked a new series of questions about dialing in CATI.

#### 2.2.1 Dialing mode prediction one year in future

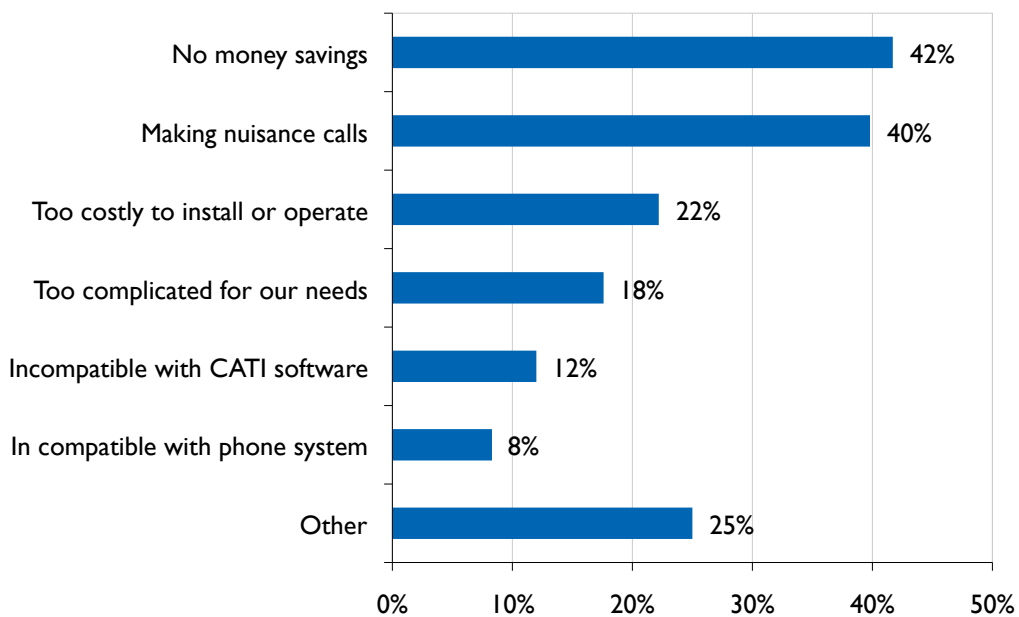
**Q: "What do you anticipate will be the percentages for each method in 12 months' time?"**



**Figure 8 Dialling modes required in future compared with present**

- The industry is predicting gradual rather than dramatic changes in dialing habits over the next year.
- The main change is that respondents predict a rise in predictive dialing at the expense of manual dialing.

### 2.2.2 Reasons for not using predictive dialing



**Figure 9 Reasons for not using predictive dialing**

#### Q: “What are your reasons for not making greater use of predictive dialing?”

- All reasons for not using predictive dialing received a generous number of ‘votes’. However, two reasons stood out, each with at least two-fifths of respondents choosing them: ‘We would not achieve many savings due to the types of call we typically make (e.g. business to business)’ and ‘We have concerns about our company making nuisance calls (abandoning a connected call because an interviewer is not available)’
- Third in the list of reasons was ‘other’. There were 27 responses, 11 of which were ‘don’t know’ or refused.

- Fourth, with almost as many responses as ‘other’ was ‘too costly to install or operate.’
- Even though dialer technology is complex, it seems that the main reasons for not using it are straightforward financial concerns, or the wish to avoid nuisance calls. Technological difficulties seem to play a relatively small role.

## 2.3 Web 2.0 user generated content

This year we asked a series of new questions about different types of Web 2.0 user-generated content.

**Q: “We hear increasingly about Web 2.0 user-generated content and the wish to use less structured data in market research surveys. Below are several capabilities that software developers could build directly into web survey tools to provide support for these methods. How important is each capability?”**

Respondents were asked to rate their demand for each of the following:

- Presenting questions and answer prompts in video format e.g. video recordings of a human interviewer
- Digital photos or other still images
- Collecting and analyzing respondent-generated video clips from webcams
- Co-creation tools that allow respondents to collaborate on design concepts or collages, effectively building respondent generated content into questionnaires themselves
- Support for bulletin boards and blogs
- Analytical tools to process and analyze unstructured text such as verbatim responses or blogs

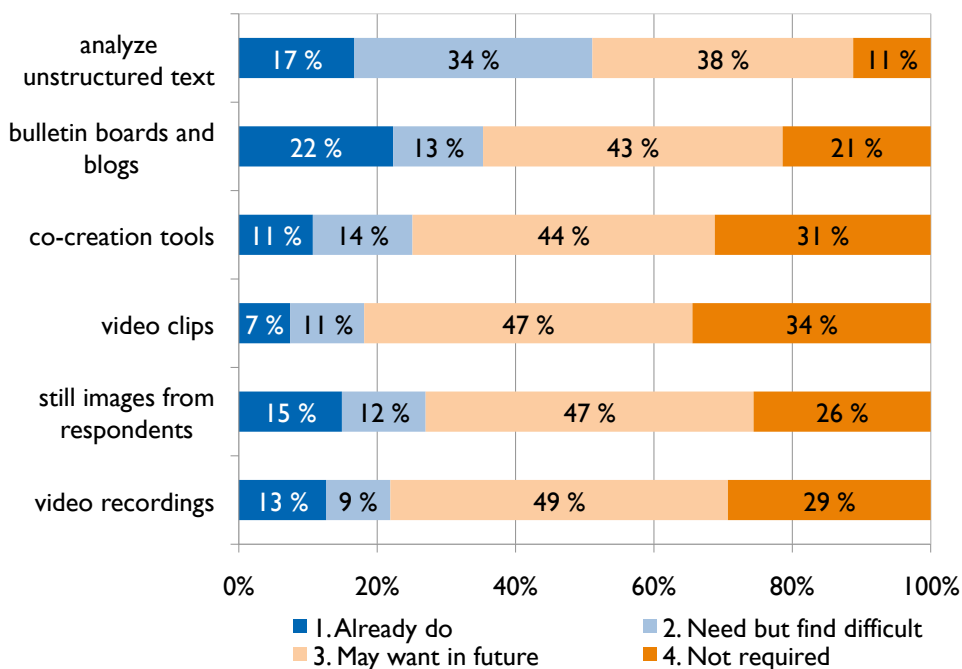


Figure 10 The importance of Web 2.0 features

- The industry seems to divide into innovators and traditionalists, with between 7% and 20% responding that they were already using each of the six Web 2.0 research approaches covered, while typically double the amount saw no requirement for these novel methods.
- Analysis of unstructured text (such as verbatims and blogs) stood out as the method most were finding difficult – a third said they ‘need it but find it difficult’

and another third expect to need it in the future. There was not much variation, either by company size or region.

- The potential demand for this type of tool seems great because over 70% of respondents say that they need it but find it difficult or may want it in the future. Only 11% say that it is not required.
- A much smaller proportion were either doing (7%) or struggling to analyze respondent-generated video clips from webcams (11%), however 48% state they may want to do this in future, and over two-fifths of large and medium, companies say that they may want to do this in the future. This seems to be the activity that the respondents find most difficult.
- For most of the other Web 2.0 questions, just under half of the respondents said 'may want in the future', showing that there is likely to be big potential in this area.

# 3 Software usage and attitudes

## 3.1 Packaged software in use

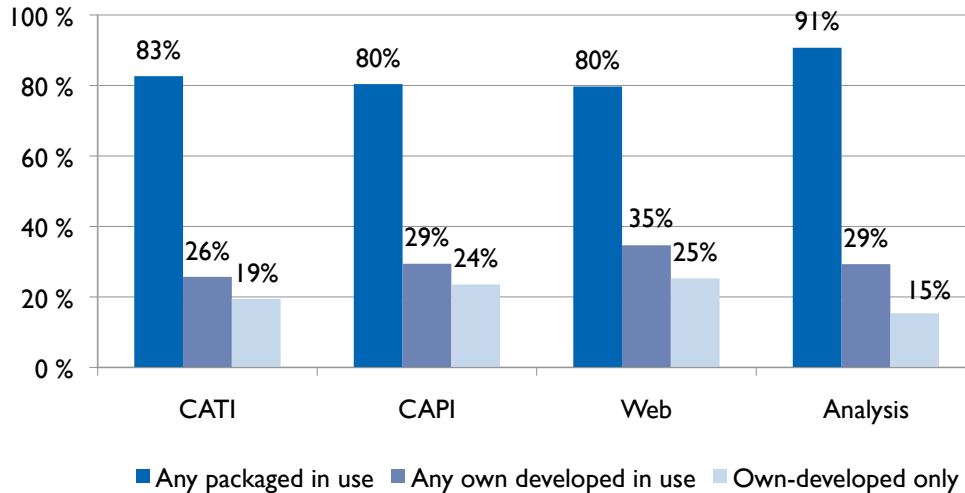


Figure 11 The use of packaged and in-house software

- The use of own-developed software has remained about the same or increased since 2007. The figures for CATI and CAPI in 2007 and 2008 are virtually unchanged. The use of own-developed Web and analysis software has risen noticeably. In 2007, 17% used own-developed Web software only, whereas in 2008 this has risen to 25%. Similarly, with analysis, the corresponding figures are 10% for 2007 and 15% for 2008.
- The use of CAPI and Web packaged software has increased, from 66% for CAPI in 2007 to 80% in 2008. For Web, these figures are 72% and 80%. CATI has remained about the same. There has been a very small decrease for analysis, which is perhaps not significant – from 94% in 2007 to 91% in 2008.
- Around a quarter to a third of companies with analysis, CATI, Web and laptop/tablet CAPI software have bespoke tools. For all, a significant number are using only custom developments.
- Some who use customized software also use packaged software. Although most companies use only packaged software. Given the high cost of software development, this indicates that a proportion of the industry, especially with respect to Web and analysis, is dissatisfied with the software tools in the marketplace.
- The use of packaged software in all areas except analysis seems relatively low. Packed CATI and CAPI software in particular has been in existence now for many years and there is a huge choice. While there has been some increase in use in packaged software this year, it seems puzzling that there is still a very significant minority who do not use any off-the-shelf applications.

### 3.2 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.

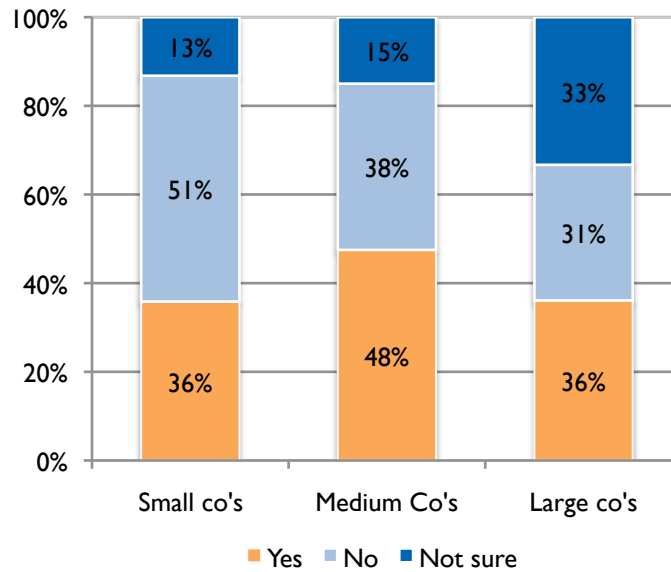


Figure 12 Plans to change software in the next one to two years (2008)

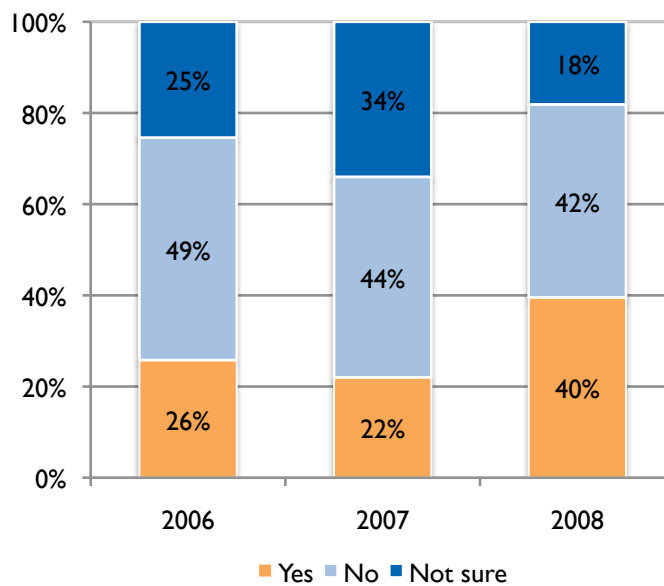


Figure 13 Plans to change software: three year trend

- Two fifths of companies (it was a third in 2007 and a quarter in 2006) do plan to change their software and just under one fifth is not sure.
- Just over two-fifths (42%) of all companies do not plan to change their software over the next one to two years. This figure has been gradually decreasing – it was 49% in 2006.
- In 2006 and 2007, a higher proportion of large companies planned to change their software in the next one to two years. This year just over a third of large companies plan to change, however this year there seems to be a higher level of uncertainty since the responses have shifted from 'yes' to 'not sure', with 'no' remaining virtually unchanged.

- Small companies seem to be much more likely to say that they are not changing their software – just over half have no plans to change. Although a considerable number (36%) still stay that they are planning to change their software. Small companies seem to be less uncertain, since only 13% are undecided.

### 3.2.1 Software considering changing

In a new question this year, we asked those respondents who were considering changing software, which software they were planning to change.

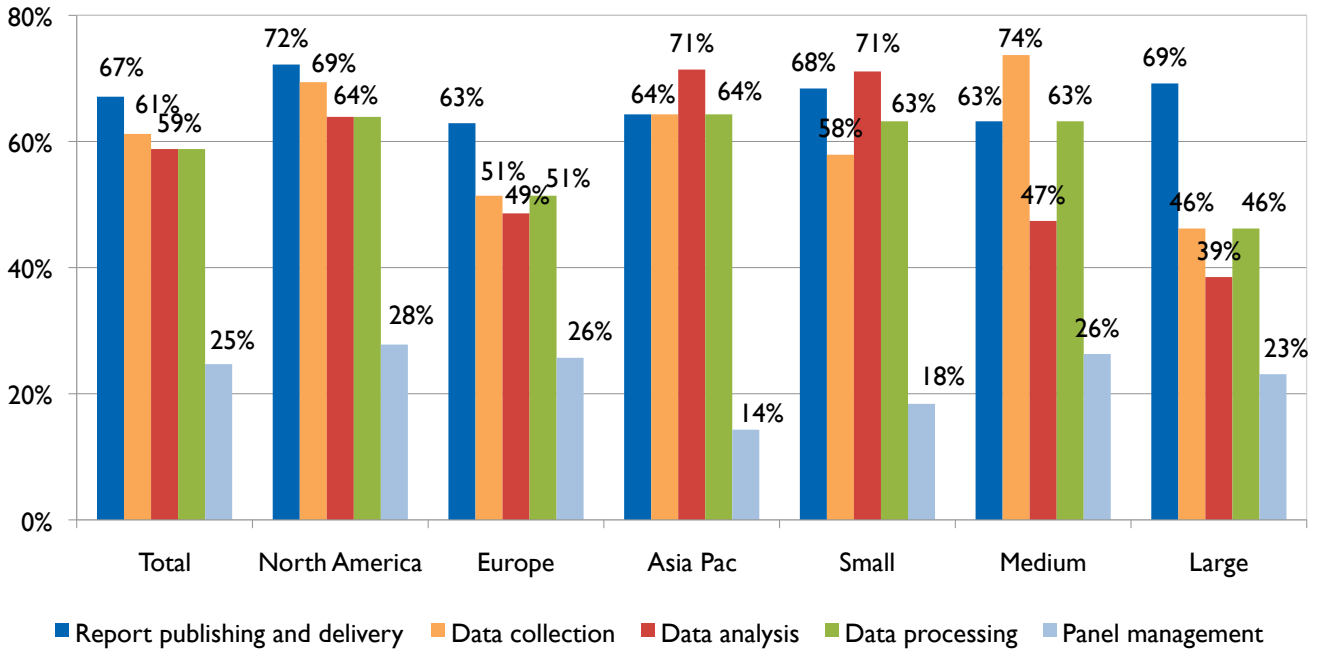


Figure 14 Types of software planning to change

- The wish to change data collection, data processing and analysis software was about the same – about three fifths for all three types of tool. Slightly more, two-thirds, wish to change their report publishing and delivery software. Panel management is by far the least likely to be changed, with only 25% considering replacing this type of software.
- Large companies are far less likely than small and medium companies to want to change their data collection, data processing and analysis tools. Although they are just as likely to want to change report publishing and delivery software and panel management tools as medium and small companies.

### 3.3 Reasons for considering a change in software

Those with plans to change their software were asked to state the reasons from a list of pre-defined options. They were asked to select up to three reasons and then to choose the most important one. We asked the same questions for each software category.

When looking at the responses from the ‘all reasons’ questions, we found that no matter which software category, the reasons in order of popularity were the same and are listed below. There was some slight variation with the order of ‘main reasons’.

1. Seeking more flexibility, more capabilities or better functionality
  2. To achieve efficiency improvements through increased automation
  3. Move to a more modern platform
  4. Consolidate all activities on a single integrated platform
  5. Dissatisfaction or concerns with the existing software
  6. To reduce software or IT costs
  7. Seeking something that is easier to use
  8. Company policy reasons
  9. Concerns with existing supplier
- For all software types, the most often cited reason for changing software is to seek 'more flexibility, more capabilities or better functionality.' This was also the case in 2007, although in that study we did not ask about individual categories of software. With the exception of data processing software, around 75-85% of respondents chose this reason as one of their top three, and around a third chose it as their main reason for changing software.
  - With data processing software, 'seeking more flexibility, more capabilities or better functionality' was still the most often cited reason among the top three, with 66% of respondents mentioning it. However, the most frequently mentioned main reason was 'consolidate on a single platform', with 30% choosing this.
  - In the majority of cases the second most important main reason was 'more modern platform' and it was selected by 20-25% of respondents.
  - Very few selected 'reduce software or IT costs' and 'easier to use' these two reasons as their main reason – for most software categories, these were the main reasons for 5% or fewer respondents.
  - Very few respondents selected 'Company policy reasons' and the reasons below that.

## 4 Mixed modes

### 4.1 Integrated or separate platforms

	2008	N America	Europe	Asia Pacific
Integrated platform	50%	45%	63%	*
Switch between different platforms	50%	55%	38%	*

\*Base too small to report

**Table 1 Integrated platform or switch between platforms for multimode research**

- Half of companies switch between different platforms when conducting multimode research. This study shows that the industry is gradually moving towards using an integrated platform for multimode research. In 2006, 38% used an integrated platform and in 2007 and 2008 the corresponding figure rose to 44% and then 50%.
- The results for Asia Pacific are not shown above since the sample size is too small – only 16 people.
- There appears to be a far higher incidence in the use of integrated platforms in Europe than in North America. This difference was also observed in 2007, but not in 2006.

### 4.2 Level of mixed mode or multimode capabilities required

	2008	2007	2006	2005
Common authoring	27%	27%	38%	35%
Mixed modes in parallel	51%	49%	40%	40%
Multi-mode with switching	21%	24%	23%	25%

**Table 2 Level of mixed mode capabilities required**

- The 2008 results are similar to the 2007 results. There was however a shift between 2006 and 2007. The requirement for mixed mode in parallel grew to about half of respondents in 2007, whereas this was two-fifths in previous years. The requirement for common authoring decreased. Multimode with switching has stayed about the same over the years – about a fifth to a quarter of respondents have this requirement.

### 4.3 Reasons for mixed mode research

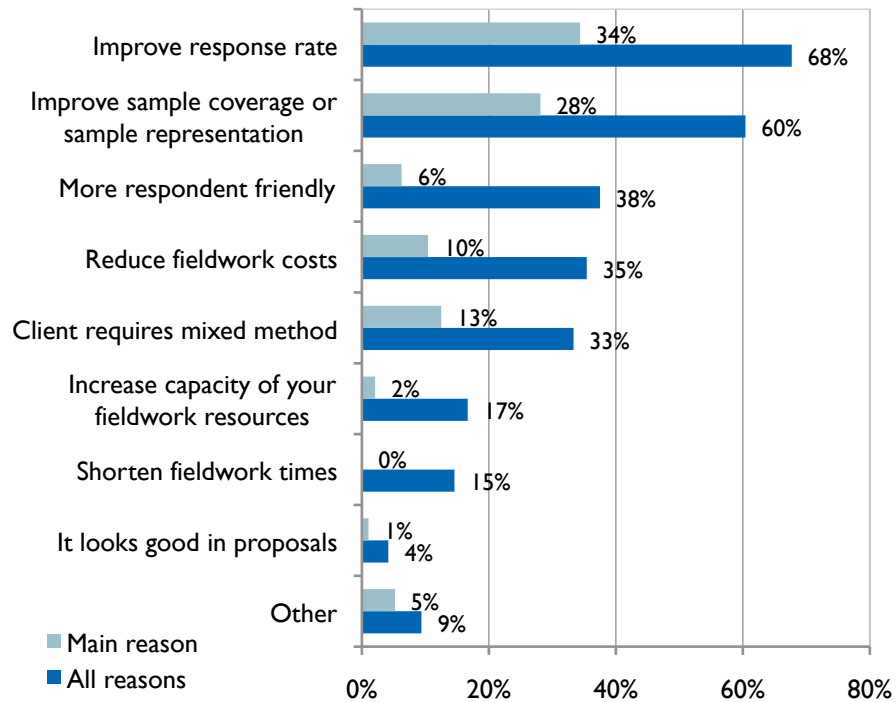


Figure 15 Reasons for conducting mixed mode research

- The reasons for mixed mode research are many: the top two cited are research quality and methodology reasons – response and sample coverage.
- Quality issues are more important than cost saving.

### 4.4 Importance of mixed mode in data collection

We asked: “If you were choosing new software, or reviewing your current solution, how much importance would you place on the tool's ability to mix and combine different data collection modes?”

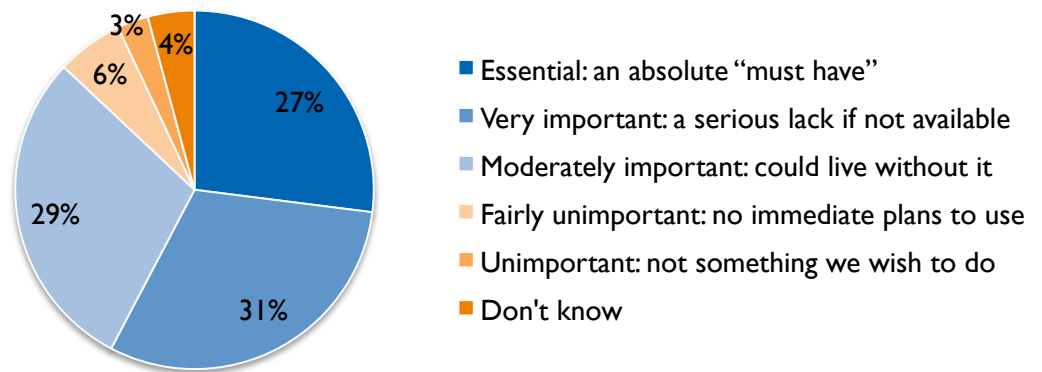


Figure 16 The importance of multimode data collection

- The results were broadly similar for all regions and company sizes.
- Nearly all respondents (88%) thought that multimode data collection was essential, very important or moderately important when choosing a new data collection tool. This is clearly food for thought for software developers!

# 5 Sample Sources

## 5.1 Online sample sources – utilization trends

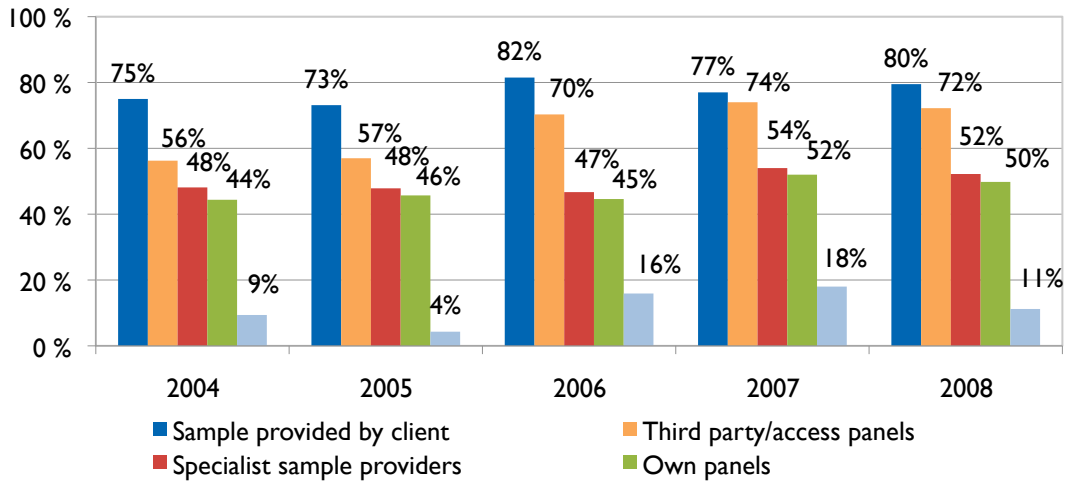
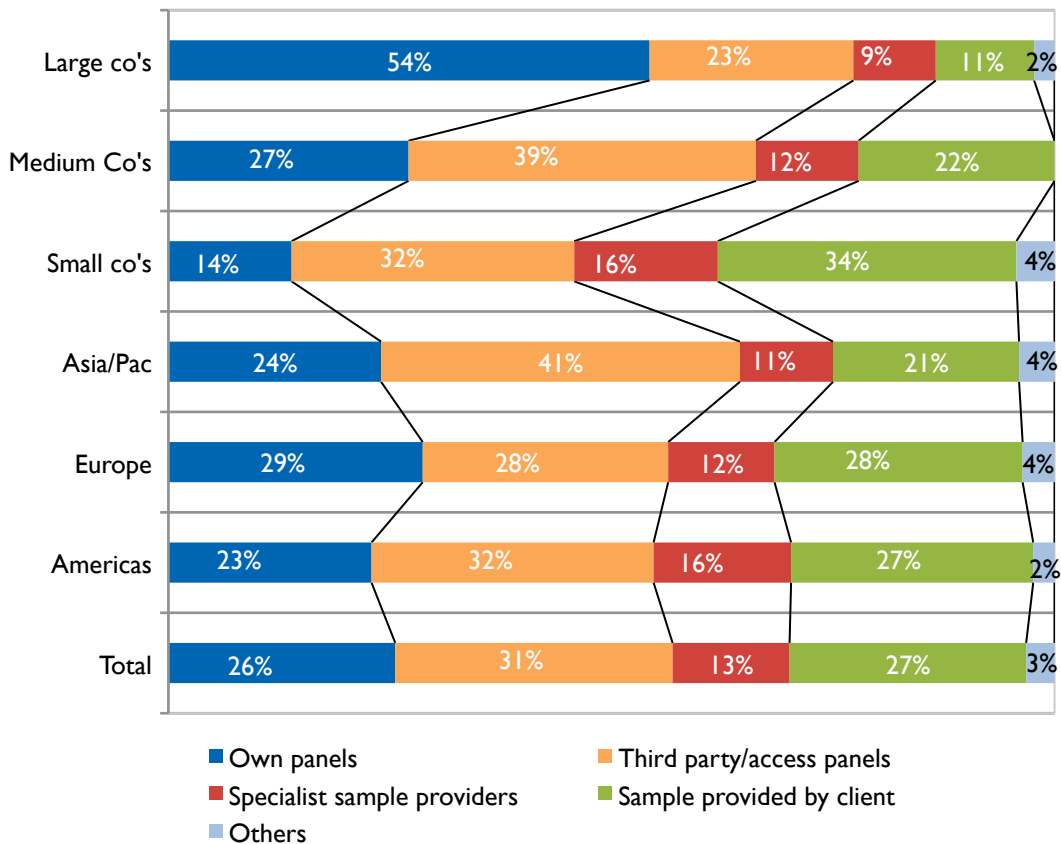


Figure 17 Sample source trends 2004-08

- In our previous studies, it appeared that access panels were gaining in popularity. This growth may have leveled off now. In 2004, 56% used access panels and from 2006 to 2008, this figure has remained at around 70%.
- In 2007, there was a slight decline in the use of sample provided by the client. However, it does not appear to be significant, since this figure has risen slightly in 2008.
- The use of own panels and, to a lesser extent, specialist sample providers, has grown modestly since 2004.
- Market research companies are clearly finding new ways to source sample, since the 'other' group continues to play a role, although it has reduced in size since 2007.

## 5.2 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 18 Revenues by sample source**

- In terms of revenue, access panels, sample provided by the client and own panels are the most important. Together, these are responsible for most (84%) revenues.
- Projects with sample from specialist providers contributes a small proportion of revenues (13%). This seems very little considering that over half of respondents report using them. A similar number use own panels, yet the revenue contribution from own panels is 26%.
- The regional results are similar to the global results. However, the results do vary considerably by company size. The larger the company, the greater is the proportion of revenues from projects using own panels, and the less revenue is derived from sample provided by the client.

# 6 Tables and reports

## 6.1 Distribution methods

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

- As in 2005, 2006 and 2007, PowerPoint slides continue to be the outright most popular deliverable in 2008. The percentage of projects using them has remained unchanged at between 48% and 49%.

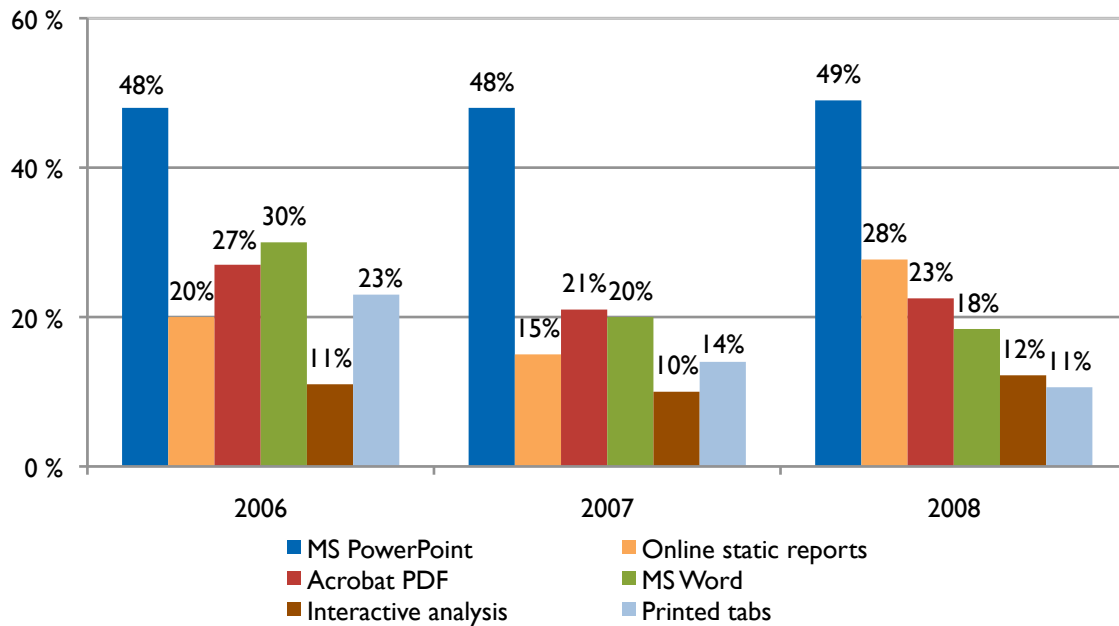


Figure 19 Percentage of projects using each distribution mode 2006-08

- The use of Word, printed tables and Acrobat pdf files decreased significantly between 2006 and 2007. These figures have not changed so significantly between 2007 and 2008.
- However, the use of online static reports has risen since 2006, from 20% to 28%.
- 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.

## 6.2 How important are printed cross tabs?

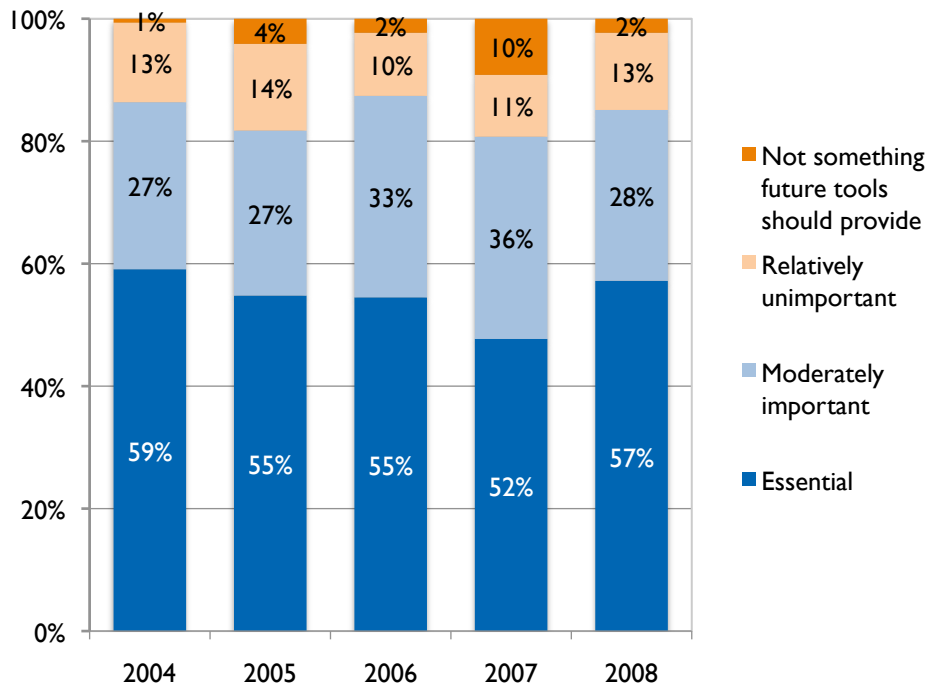


Figure 20 The importance of printed cross tabs 2004-08

- 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.

## 6.3 Future demand

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

- Online delivery of fixed reports, including cross-tabs and charts which are automatically updated
- Ability for clients to create their own tables and charts online
- Ability to provide information portals that integrate research data with data from other sources

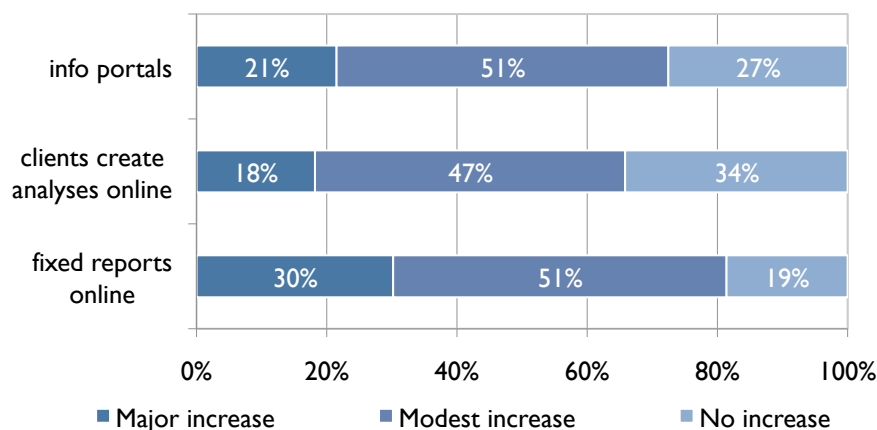


Figure 21 Changes in demand for various ways of delivering analyses – overview

- The respondents predict online reporting to grow over the coming year. In all cases, at least 65% think there will be an increase in demand. In the case of online delivery of fixed reports, more than four in every five respondents think that there will be increased demand.
- With each reporting method, between about two-fifths and a third of respondents think there will be no change, but virtually none think there will be a decrease.

## 6.4 Future wishes for analysis and reporting tools

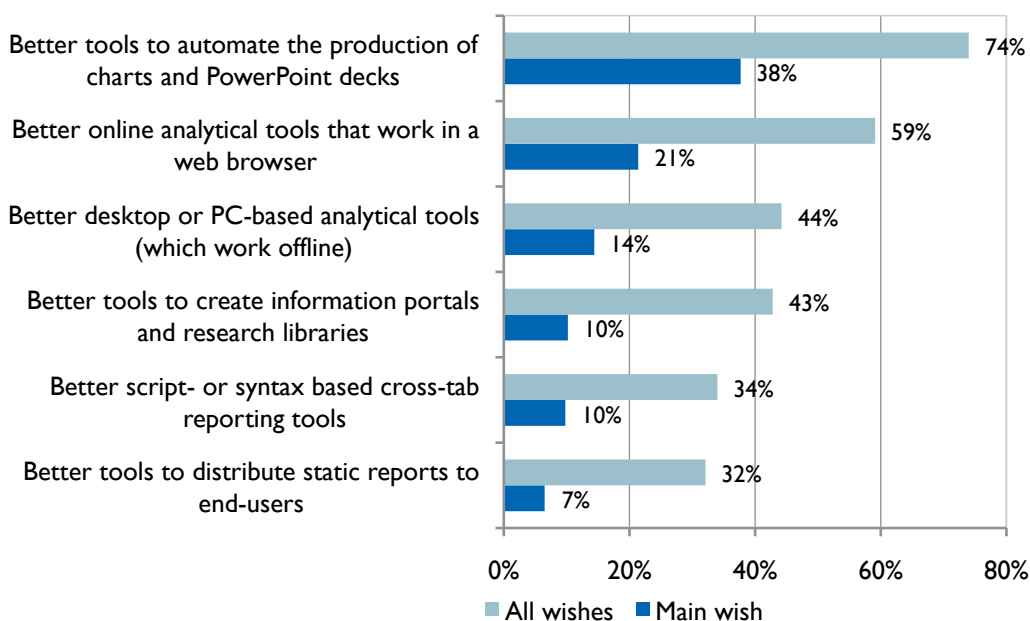


Figure 22 Future wishes for analysis and reporting tools

- ‘Better tools to automate the production of charts and PowerPoint decks’ is by far the most popular wish. Nearly two-fifths of the respondents choose it as their top priority, and nearly three-quarters say that it is one of their wishes.
- ‘Better online analytical tools that work in a web browser’ is the second most popular wish, with just over one-fifth choosing it as their main wish and nearly three-fifths 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 2008, with 44% and 43% selecting these as one of their wishes, and 14% and 10% of respondents selecting them as their top priority.

## 6.5 Variations in analysis and reporting practice

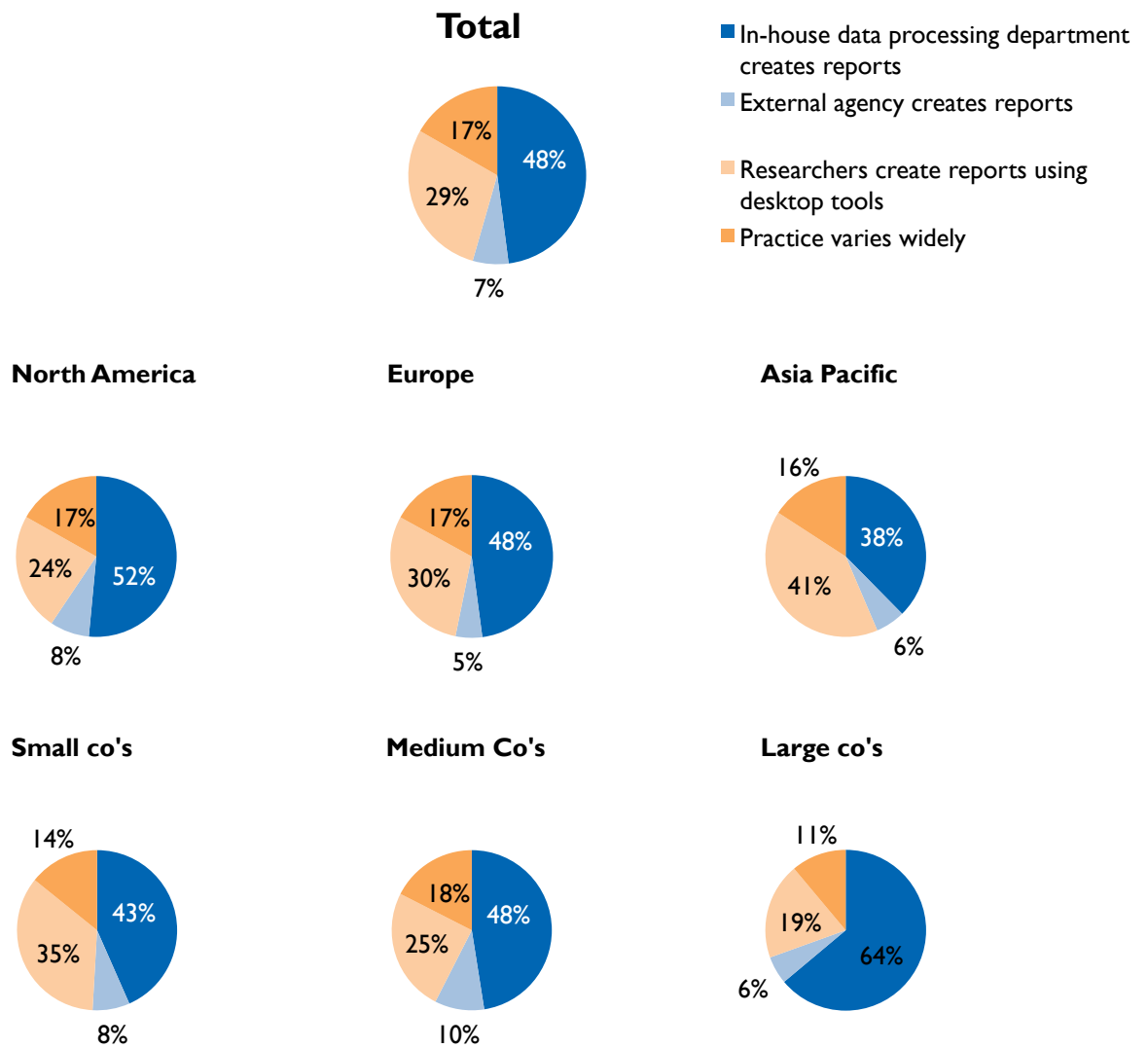


Figure 23 Analysis and reporting practices by region and company size

- Data analysis is still predominantly carried out by specialists (54% overall), with in-house accounting for most of that (47%) and bureau work the rest (7%).
- Though 29% of analysis is done by researchers themselves, it is much more common in small firms (35%) and less common in large companies (19%). Large companies are far more likely to use in-house specialists for analysis and reporting (64%)

## 7 Analysis of sample

### 7.1 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 behavior. 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 32 respondents in the Pacific Rim, so we therefore advise caution in interpreting some of the less emphatic differences between Pacific Rim companies and the others.

Company size is reasonably well distributed across the three global regions.

	Total		Small		Medium		Large	
Total	215	100%	119	100%	25	100%	46	100%
N America	89	41%	44	37%	25	50%	20	44%
Europe	94	44 %	61	51%	16	32%	17	37%
Pacific Rim	32	15 %	14	12 %	9	18%	9	20%

Table 3 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 over \$25m category is only a reflection of the ‘pyramid’ that exists of company size, with a smaller number of large companies globally.

#### 7.1.1 Countries Covered

27 countries are represented in the 2008 survey are as listed below.

As last year, 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>. By assessing the turnover of a country or region as a percentage of the worldwide turnover figure, we were able to set target number of respondents for each country or region, in particular for key markets: North America, UK, France, Germany, Japan, Australia, China, Spain and Italy. Inevitably, in some cases we achieved or exceeded our targets and in others we fell short. Although in many cases other countries within a region made up for shortfalls elsewhere – for example, France, Spain and Italy were below target, whereas the UK, Germany and the smaller European countries were above target. For this reason, the regions were extremely well balanced.

The survey was translated into French, German and Japanese.

---

<sup>1</sup> ESOMAR Global Market Research report, 2007.

<b>Total</b>	<b>215</b>	<b>100.0 %</b>	China	2	0.9 %
USA	78	36.3 %	Ireland	2	0.9 %
UK	29	13.5 %	Korea	2	0.9 %
Germany	26	12.1 %	Romania	2	0.9 %
Australia	13	6.0 %	Russia	2	0.9 %
Canada	11	5.1 %	Spain	2	0.9 %
France	10	4.7 %	Denmark	1	0.5 %
Japan	6	2.8 %	Finland	1	0.5 %
The Netherlands	5	2.3 %	Hong Kong	1	0.5 %
India	4	1.9 %	Italy	1	0.5 %
Bulgaria	3	1.4 %	New Zealand	1	0.5 %
Norway	3	1.4 %	Portugal	1	0.5 %
Switzerland	3	1.4 %	Taiwan	1	0.5 %
Belgium	2	0.9 %	Thailand	1	0.5 %

Table 4 Respondents by country

## 7.2 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 (and is an improvement on previous years), as can be seen from the charts below, which show that nearly 80% of the sample were either at board level or were primary decision makers for software and technology issues:

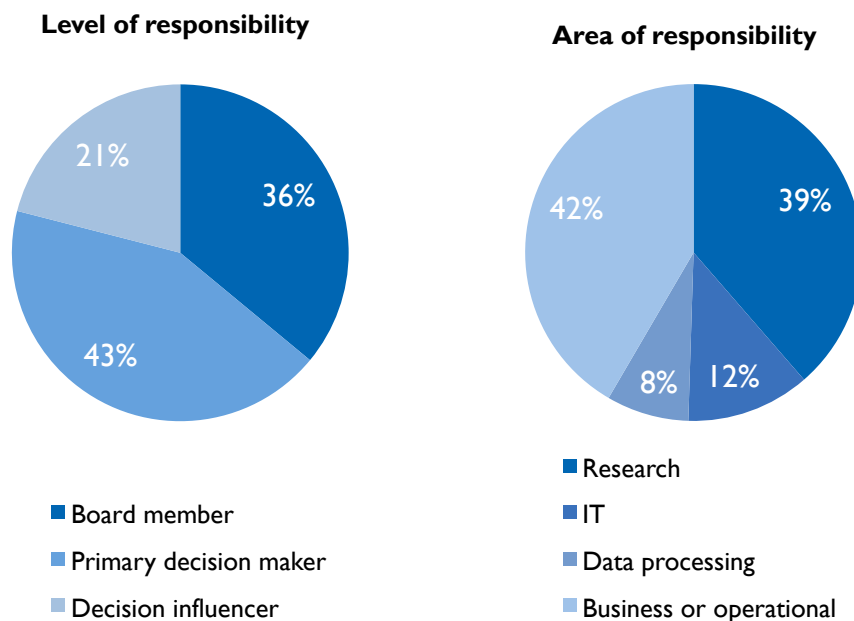


Figure 24 Respondents' levels and areas of responsibility

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 20% of the sample considering themselves to be technical specialists, we consider the survey is not overly biased towards a technocentric view; 39% had research responsibilities and 42% 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.

## 7.3 Detailed analysis of the demographics

			Global region			Company Size		
<b>TOTAL</b>	<b>Total</b>		Americas	Europe	Asia/Pac	Small	Medium	Large
	215		89	94	32	119	50	46
			100%	100%	100%	100%	100%	100%
<b>Region</b>								
Americas	89	41%	100%	0%	0%	37%	53%	44%
Europe	94	44%	0%	100%	0%	53%	35%	42%
Asia Pacific	32	15%	0%	0%	100%	10%	13%	14%
<b>Area of responsibility</b>								
Research	83	39%	37%	40%	38%	52%	25%	17%
Technical	42	12%	18%	19%	25%	10%	25%	33%
Business or Operational	90	8%	45%	40%	38%	39%	50%	50%
<b>Level of responsibility</b>								
Board Member	77	36%	18%	54%	31%	38%	48%	19%
Primary decision maker	93	43%	57%	35%	28%	51%	35%	39%
Decision influencer	45	21%	25%	11%	41%	11%	18%	42%

**Table 5 Sample analysis: responsibility by global region and company size**

Samples were drawn to provide a balance of representation by region only, which is our tier I demographic. However, we are also concerned to ensure that within global region and within the other key demographic of company size, there is a reasonable balance for level of responsibility and seniority. We do not consider it desirable to use any form of post hoc weighting, for reasons that any weighting targets set would be speculative – it is not possible to know the distribution or relationship of these secondary demographics either in isolation or within company size or global region.

In fact, the sample has achieved remarkably even balance within each category, for the most part.

Exceptions are:

- Fewer board level respondents in America, which is not desirable, and could have an influence on the American findings. It is not something which is easily resolved, given the difficulty of gaining access to senior company executives, without considerable cost and effort.
- More ‘decision influencers’ in Asia Pacific, which again is undesirable.
- More respondents identify with the “researcher” title in smaller companies than in large; conversely, more respondents identify with “business and operational” in larger companies. This is understandable, and is an accurate reflection of the specialization that occurs in larger companies, and the role of the generalist in smaller firms, and is an influence already apparent in many of the findings.