The Confirmit Annual Market Research Software Survey 2011

Devised and conducted by meaning ltd

Eighth annual survey

Report written by
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Introduction and key findings

The Confirmit Annual MR Software survey, now in its eighth year, is conducted annually by meaning ltd, an independent research technology consultancy in London, UK. The survey provides a unique set of information and insights into 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.

This year (and in several previous years), the survey has been kindly sponsored by Confirmit, and is therefore known as the Confirmit Market Research Software Survey.

The survey comprises a sample of 230 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. Sample is obtained from a variety of sources:

- Participants who agreed to be re-contacted from the previous year’s survey
- Sample compiled by meaning ltd including
- Sample provided by the survey’s sponsor, Confirmit
- Sample from 2009 and 2010 surveys

We estimate 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) to be 6% (compared with 10% in 2010). However, our invitation makes it clear that the survey is concerned with research technology, and is addressed to those who are decision-makers or influential in technology decisions, so we are aware that there is an unknown level of screening out taking place before any response is recorded. A truer measure of response would be among those eligible to participate (senior technology practitioners within research companies), and that we are unable to calculate.

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 are of value. However, due to the nature of the sample, as in pervious 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 11 (p, 72)

The 2011 Survey, as in previous years, comprises a mixture of tracking questions and new questions for that year, which explore topics of the moment. For 2011, we have explored four such topics: Handling unstructured text (Chapter 3, p. 22), ‘New MR’ methods
(Chapter 4, p. 30), Smartphone usage on conventional online surveys (Chapter 5, p. 42) and Data Visualization (Chapter 6, p. 46). Tracking questions follow in Chapters 6 onwards (starting on p. 46).

### 1.1 New topics for 2011

In this section we present some of the key findings from the four topics explored for 2011. More detailed analysis and figures and provided in subsequent chapters.

#### 1.1.1 Analysis of unstructured text

**Increasing volumes of unstructured text**

Two-fifths (40%) of the companies that offer online quant surveys say there has been an increase in their use of unstructured text; and over half (55%) say they are experiencing an increase in the use of unstructured text with other research activities. Very few participants in this survey (7%) are experiencing a decrease in unstructured text with their online quant surveys; and for other research activities this figure is below 1%.

**Widespread use of unstructured text**

One-fifth (20%) of participants say that their companies use unstructured text in 61% to 100% of projects; three in ten (30%) use unstructured text in 21% to 60% of projects.

**Growth in use of unstructured text expected to continue**

Over half (55%) of participants expect their use of unstructured text to increase in the next one to two years – especially in North America, where 62% are expecting growth. Only 3% say that their use of unstructured text will decrease.

**Diversity of analysis methods**

We listed nine types of analysis methods for unstructured texts and all (which are described next), except crowdsourcing, were used by at least 10% of companies.

**Low tech. and shallow analysis methods most commonly used**

The most commonly used methods cited were the manual or largely methods: manual coding (such as in Excel), which is used by 84%, and semi-automated coding (for example an online tool that helps you organize your work but leaves coding decisions to the human user) - 51% use this method.

**Predicted growth in the deeper analytical methods**

The participants say that they are going to make greater use of all analysis methods. At the top of their list is semi-automated coding, with over two-fifths (43%) mentioning this method. Just under two-fifths (38%) want to use text mining more and a third (33%) would like to do more automated coding. Again, crowdsourcing scores lowest, with 5% wanting to make more use of it.
Delivering insight from unstructured text is difficult

Many market research companies sit on the fence about the difficulty of delivering insights from unstructured text, with over a quarter (28%) saying that it is neither easy nor difficult. More say it is hard (42%) than easy (31%).

1.1.2 ‘New MR’ vs conventional quant MR

The survey explored the following ‘New MR’ activities:

- MROCs or Online Communities
- Web scraping
- Co-creation
- Digital ethnography
- Crowd-shaped questionnaires
- Neuroscience
- Synthetic respondents

Large companies leading the way with New MR

Almost a third (31%) of companies are already providing their clients with services based on New MR, and almost two-fifths (39%) are currently evaluating it. Large companies seem to be further ahead with New MR - more than two-fifths (45%) of them are offering it and 38% are evaluating it.

New MR methods entering the mainstream

A significant proportion (9%) of participants’ research is based on New MR methods. For large companies it is more (12%).

An increase in the use of New MR widely predicted

Most (84%) of participants think that the proportion of their work using New MR will increase over the next one to two years – and this is especially the case in large companies where the figures is 96%. Less than 1% of the respondents think it will decrease.

Unclear whether quant work is being replaced by New MR

Respondents are divided about their volume of conventional quant work – 31% say their quant work is decreasing, 31% say it is still growing and the rest (38%) say there is no change.

Tight finance tops reasons for decline in conventional quant MR

Of those respondents who say their quant MR is declining, the most common reasons they state are smaller client budgets (68%) and the general economic climate (56%). Although, perhaps more interestingly, over half (52%) put at least part of the blame on clients switching to New MR.

1.1.3 Survey takers using smartphones for online surveys

Claimed share of surveys taken on smartphones is high

Participants estimate that 7% of research participants are using smartphones to complete regular online surveys – that is, those not specifically targeted at mobile participants. This figure is higher than many would expect. (For comparison, 3.5% of
those who at least started this survey used a smartphone or iPad; but, looking only at the completes, only 3 people or 1.3%, used a mobile device. And this survey was optimized for smartphones).

**Little consideration of smartphones in MR industry**

It seems that relatively few MR companies have taken an active approach in catering for survey takers using smartphones for online surveys. Only about one in seven (15%) adjust their online surveys to make them suitable for smartphones. Many companies (30%) have no policy for smartphones or about the same number (32%) are happy to allow participants to take their surveys on smartphones but do not bother to modify them.

### 1.1.4 Data visualization

**Growth in data visualization**

Most respondents (80%) are experiencing a growth in demand for data visualization. There is a clear difference by company size – with large companies almost all (93%) are experiencing growth but with small companies this figure is 70%.

**PowerPoint and Excel dominate**

Despite increasing demands for more advance visualizations, the tools that dominate the field are the generalist office tools. Specialist tools, though available, are under-utilised.

### 1.2 Trends (tracking questions)

There is a central core of questions in this survey that we have been asking for several years – and some since the inception of this project in 2004. With several years’ data, clear and stable trends have emerged. This shows continued consistency in the survey as a whole, since the sample this year is made up largely of different companies and individuals than last year.

**Web dominant and still getting stronger**

We have been thinking for the last few years that Web research has reached saturation because almost all research companies offer it, but this figure has risen from 92% of companies in 2010 to 96% in 2011. It now also accounts for just over one half (51%) of quant revenues. This is also a slight increase on the previous three years.

**CATI in good health**

It did seem in the past that CATI was taking a hit, but as we gather more trend data, it appears that CATI revenues are remaining stable at around one quarter of those reported.

**Paper taking a hit – probably from Web**

Over the past six years, the research modes offered have varied little, but some work appears to have has shifted from paper to Web. Since 2006, the revenues derived from Web research have increased by 11 percentage points, whereas paper has declined by seven percentage points.
Three modes account for almost all quant revenues

After Web, CATI is the next largest revenue generator, with just under a quarter (23%) of revenues, followed by paper with 14%. Each year since 2006, Web, CATI and paper together have represented at least 85% of quantitative revenues.

Little optimism for growth

Respondents are most optimistic about the prospects of Web and self-completion on mobile devices, where they expect a modest growth in the amount of work over the next three years. However, even for these two modes, respondents are less optimistic that they were in 2010. For all other modes, respondents are predicting either a very small growth or, in the case of paper, CATI and IVR, a decline.

Demand for new software very strong

Almost a half (46%) of MR firms are planning to change their software – this is the largest proportion since we first asked this question in 2006. Just over a third (35%) say they have no plans to change their software – and this is the smallest proportion so far recorded in this study. The sands shift slightly in a different direction every year in this question, although most years just below a half of respondents say that they are keeping their software.

Mixed mode software now the norm

There has been a rise since 2006 in the number of firms with an integrated platform for mixed mode research, from only 38% in 2006 to 60% in 2011.

Sample sources hold steady

Access panels and samples supplied by the client remain the dominant sample sources, and seem to be becoming more dominant. In 2004, 75% of companies used sample provided by the client and 56% used access panels; in 2011 these figures rose to 86% and 80%. This is despite predictions in recent years that the industry would be using their own panels more in the future, and access panels less. Access panels are more heavily used in North America and in-house panels are more common with larger companies.

Little change in results delivery since 2006

PowerPoint continues to dominate as the delivery method, drifting upward each year to reach 53% in 2011. There has been remarkably little change over the years. Digital dashboards, interactive analysis are used in less than one in ten projects. The clearest and possibly only real change is the reduction in the use of printed tabs: 23% in 2006 to 9% in 2011

Demand for volume production of cross-tabs softening – but almost imperceptibly

The proportion of those considering essential the creation of cross-tabs in bulk has dropped from 59% to 52% over the eight years of the study, and the small minority who see them as unnecessary remains remarkably static.
2 Current and predicted activity

Since the inception of the study in 2004, we have been monitoring the relative importance of different interviewing modes and the technologies behind them. In 2006 we started collecting data on the relative volumes of work. This now provides six years of comparable data.

2.1 Quantitative vs. qualitative

- Almost three quarters (72%) 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.

2.2 Research modes practised (penetration)

2.2.1 Major modes

- As in previous years, the Web is by far the most prevalent mode of research, with nearly all respondents (96%) saying that their companies do this type of work. The figure has been above 90% since 2007.
- The proportion of companies using CATI has remained constant, at around 70% since 2006.
It is not clear whether there is a trend with paper-based self-completion (which we refer to as ‘paper’). After some apparent sudden changes in 2008 and 2009, the 2010 and 2011 figures look more in keeping with what we would anticipate – at 59% in 2010 and 56% in 2011, it is now slightly below what it was in 2006 and 2007 (62% and 63%).

As is shown in the next section, revenues from paper are decreasing, so it would seem likely that the number of companies offering paper would drop.

Figure 2 Percentage of market research firms using the main modes of research
2.2.2 Minor modes

We increased the number of modes we asked about in 2007, so there is now three years’ data to compare on these more specialised survey modes.

Overall, there is some volatility in these numbers, which is consequence of the survey’s small sample size.

Most years CAPI usage has remained steady at around 30%. In 2011, this has increased to to 45%. It is too early to say if this is a new trend or simply a random fluctuation due to yearly sample variation – which we suspect is the case.

Since 2009, we have collected separate data for laptop CAPI and mobile CAPI. 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.

Mixed mode usage has risen sharply 2010 and this seems to have continued into 2011, so possibly as technology improves more companies are now offering mixed mode. This is consistent with later questions in the survey on mixed mode (see Mixed modes, p 59). However, it is still a little early to tell whether this is a new trend.

Despite the attention it receives at industry events, ‘self completion using mobile devices’ is another minority mode with 11% of the respondents saying that their companies offered it. Again, this mode is far more widely used by large companies, with 33% of them offering it (which is almost double the 2010 figure of 17%).

In general, large companies are more likely than small or medium companies to be offering any particular methodology. It is particularly noticeable that the ‘minority’ modes are commonly offered in large companies – SMS (17%), mobile self completion (33%), IVR (26%).
- IVR is offered by 9% of the companies in this study. It is rare in Europe and in small companies. The main users are in North America, where it is offered by 18% of companies; and large companies are also lead (26%).
- SMS is still very much a minority mode and is possibly growing very slightly – 3% of companies offered it in 2006 and 6% in 2011. It is mainly large companies that are exploring SMS – 17% of large companies offer it, compared with 2% and 7% of small and medium-sized companies. The picture was similar in previous years.

### 2.2.3 Current year, research modes practised

<table>
<thead>
<tr>
<th>Research mode</th>
<th>2011</th>
<th>Total</th>
<th>North America</th>
<th>Europe</th>
<th>Asia Pac</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web</td>
<td>96%</td>
<td>98%</td>
<td>97%</td>
<td>90%</td>
<td>97%</td>
<td>96%</td>
<td>96%</td>
<td>93%</td>
</tr>
<tr>
<td>CATI</td>
<td>71%</td>
<td>68%</td>
<td>75%</td>
<td>67%</td>
<td>67%</td>
<td>70%</td>
<td>86%</td>
<td></td>
</tr>
<tr>
<td>Paper</td>
<td>56%</td>
<td>44%</td>
<td>62%</td>
<td>67%</td>
<td>54%</td>
<td>53%</td>
<td>67%</td>
<td></td>
</tr>
<tr>
<td>Mixed mode CATI &amp; Web</td>
<td>45%</td>
<td>54%</td>
<td>41%</td>
<td>36%</td>
<td>41%</td>
<td>47%</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Laptop CAPI</td>
<td>38%</td>
<td>27%</td>
<td>43%</td>
<td>49%</td>
<td>28%</td>
<td>42%</td>
<td>60%</td>
<td></td>
</tr>
<tr>
<td>mCAPI</td>
<td>20%</td>
<td>18%</td>
<td>22%</td>
<td>21%</td>
<td>11%</td>
<td>27%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Other mixed mode</td>
<td>15%</td>
<td>13%</td>
<td>12%</td>
<td>28%</td>
<td>10%</td>
<td>14%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Self-completion on mobile devices</td>
<td>11%</td>
<td>12%</td>
<td>8%</td>
<td>18%</td>
<td>3%</td>
<td>11%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>IVR</td>
<td>9%</td>
<td>18%</td>
<td>1%</td>
<td>13%</td>
<td>3%</td>
<td>9%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>SMS</td>
<td>6%</td>
<td>6%</td>
<td>4%</td>
<td>13%</td>
<td>2%</td>
<td>7%</td>
<td>17%</td>
<td></td>
</tr>
</tbody>
</table>

| N  | 230 | 85   | 106 | 39  | 114 | 74  |

Table 1 Research modes practised, current year

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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 will vary by mode.

![Figure 4 Research modes by volumes (% of revenues), six-year trend](image)

- Since 2006, when we first asked this question, most modes have been stable across these six years.
- The main exceptions are Web and paper. Web research accounted for 40% of revenues in 2006 and this has risen to 51% in 2011. It appears that it has grown at the expense of paper, which has dropped from 21% of revenues in 2006 to 14% in 2010.
- Web, CATI and paper together are the source of most (over 85% every year) of the revenues from quantitative work.
- Mixed mode research represents 6% of revenues (and the same is true for the years 2006 to 2010). It seems a lower than expected proportion of revenues given that over half of companies are conducting mixed mode research.
- Similarly laptop and tablet CAPI provides a low proportion of the income (5%) compared with the number of companies who use it (38%).
- SMS, IVR and ‘other self completion on mobile devices’ provide 1% or less of revenues. (For the sake of clarity, all of these modes of research have been omitted from the chart).
- It is noticeable that in Asia Pacific the revenue from paper surveys is 32%, compared with 13% for the world as a whole, and in North America it is 5%. This seems to be mainly at the expense of Web. In Asia Pac, the Web revenues are 35% and in North America 62%.
• CAPI revenues are higher in Europe than North America and Asia Pacific – 11% in Europe, 4% in North America, 5% in Asia Pacific.
• Companies of all sizes earn their revenue in very similar proportions to each other. All are earning around a half from Web, just over two-fifths from CATI and between 11% and 14% from paper.

2.3.1 Current year research modes by volume

<table>
<thead>
<tr>
<th>Research Mode</th>
<th>Total</th>
<th>North America</th>
<th>Europe</th>
<th>Asia Pac</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web surveys (self completion)</td>
<td>50%</td>
<td>62%</td>
<td>47%</td>
<td>35%</td>
<td>51%</td>
<td>51%</td>
<td>46%</td>
</tr>
<tr>
<td>CATI (single mode)</td>
<td>22%</td>
<td>20%</td>
<td>25%</td>
<td>20%</td>
<td>23%</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>Paper</td>
<td>13%</td>
<td>5%</td>
<td>13%</td>
<td>32%</td>
<td>14%</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Laptop or tablet CAPI</td>
<td>5%</td>
<td>2%</td>
<td>8%</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Mixed mode CATI and web CAPI on handheld or mobile devices</td>
<td>4%</td>
<td>6%</td>
<td>3%</td>
<td>3%</td>
<td>5%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Any other mixed mode</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>IVR (Interactive Voice Response)</td>
<td>1%</td>
<td>1%</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Other self-completion on mobile devices (not SMS)</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>1%</td>
<td>*</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>SMS text messaging (self completion)</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>1%</td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>230</strong></td>
<td><strong>85</strong></td>
<td><strong>106</strong></td>
<td><strong>39</strong></td>
<td><strong>114</strong></td>
<td><strong>74</strong></td>
<td><strong>42</strong></td>
</tr>
</tbody>
</table>

* Value is <0.5%

Table 2 Research modes by volume (revenue), current year
2.4 Predicted changes in interviewing mode

We asked respondents to predict changes over the next three years using a four-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.

- Overall, predictions about the more specialised modes tend to be the most volatile, while the more mainstream modes are much more stable.
- In 2011, although companies predict a slight growth for almost all modes, growth expectations are more cautious than in previous years.
- Laptop and tablet CAPI is an exception, with higher growth expectations in 2011, though the actual growth expected is barely above zero.
- Web still scores highly on anticipated growth, but over six years, these growth predictions have become more modest each year.
- Web is closely followed by ‘self completion on mobile devices’, as the other fast-growing mode. Although, even for these two modes our participants are only predicting modest growth.
- Expectations for ‘self completion on mobile devices’ appear to have peaked: from a low to modest start in 2008, modest in 2009, strong in 2010 and back to modest again in 2011.
- CATI and paper are expected to decline modestly, although a greater slowdown is forecast for paper. The result for paper certainly seems to be borne out by the results in the previous two sections. However, the situation with CATI is less clear.
- IVR has for the first time slipped into decline. However, in previous years its growth was around zero, so this is only a small change.

2.4.1 Predicted changes viewed by company size

![Figure 6 Predicted changes in research modes, by company size](image)

Scale values:

- 2 = major growth
- 1 = modest growth
- 0 = no change
- -1 = any decline

- Small companies more optimistic about CATI and Web, more cautious about SMS and Mobile self-completion.
- Large companies more optimistic about Mobile self-completion, Mobile CAPI, but more pessimistic about the other mainstream modes of CATI and Paper.
Handling unstructured text

In addition to the trend data we collect annually, each year we select several topics to explore in detail. The handling of unstructured text is the first of these for the 2011 study. This is widely reported by research practitioners as a being a characteristic, even a difficulty of doing research in a social media context. Conventional online researchers are themselves well aware that open-ended questions in surveys highly relevant to the participant can yield very large amounts of unstructured data which are much more difficult to analyse and extract meaning from than the discrete, numerically encoded questions that usually populate quantitative surveys. Our questions in this section therefore explore some of the issues raised.

We assess the scale of the problem by asking the extent to which companies considered the volume of unstructured text being handled as increasing, for two most likely sources of growth: conventional quantitative surveys and other research activities such as online qualitative and social media research activities. We asked for an estimate of the volumes they were now handling.

We then ask about the kinds of technology being applied to unstructured text, including manual methods, and then the participant’s assessment of the effectiveness of these methods in solving the problem.

3.1.1 Is the amount of unstructured text increasing?

Online Quantitative

We asked:

To what extent are you seeing a change in the volume of unstructured text that your company handles from online quant surveys?

![Figure 7 Changes in the amount of unstructured text received from online quant surveys](image-url)
Roughly half of the sample is experiencing an increase, the other half sees the volume staying the same or, in a very few cases, decreasing.

The larger the company, the greater the increase in the amount of unstructured text in online quantitative surveys.

Half of all companies report an increase in unstructured text in online quantitative surveys, whereas 64% of large companies say it is increasing.

**Online qualitative and social media work**
We then asked “To what extent are you seeing a change in the volume of unstructured text that your company handles from other research activities, such as online qualitative work and social media-based research?”

![Figure 8 Changes in the amount of unstructured text received from other research activities](image)

Compared to online qual, the growth here is slightly higher, with 55% seeing any increase, and 18% seeing a major increase.

As with online qualitative, it appears the larger the company, the greater the amount of unstructured text received.

**3.1.2 How many projects contain unstructured text?**
We asked:

*Roughly how many of your projects contain large amounts of unstructured text that you need to analyze?”*

and presented five equidistant intervals (0-20%, 21-40%, etc).

Mean averages were estimated, by converting the distribution into numeric values, using the midpoint in each range.

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>N America</th>
<th>Europe</th>
<th>Asia Pac</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Est. Mean</td>
<td>33.2</td>
<td>33.2</td>
<td>30.6</td>
<td>40.3</td>
<td>32.0</td>
<td>37.0</td>
<td>30.0</td>
</tr>
</tbody>
</table>

Table 3 Research projects with unstructured text by region and company size: estimated average proportion
- Approximately one third of projects contain large amount unstructured text data.
- The average is higher in Asia Pacific and also among the mid-sized companies. It is lower for large companies.

![Figure 9 Proportion of research projects with unstructured text](image)

- Examination of the distribution of these intervals shows the proportions are skewed to the lower-end of the scale, with almost half the companies reporting fewer than a fifth of their projects contain unstructured text.
- This rises to 60% for large companies.

### 3.1.3 Anticipated changes

We asked:

*How do you predict this will change over the next 1-2 years?*

![Figure 10 Forecast over how projects containing large amounts of unstructured text will change over the next 1-2 years](image)

- Companies are divided between whether the growth in unstructured text will continue, or has reached its peak, with 43% not anticipating further growth.
A slim majority, 52%, are expecting the volume to grow, which includes 12% anticipating strong growth.

Very few (3%) think a decrease is likely.

### 3.2 Methods used

We asked three related questions:

- **What methods do you ever use when analyzing large amounts of unstructured text?**
- **Which of those methods do you use most frequently when analyzing large amounts of unstructured text?**
- **Which of these methods are you likely to make greater use of in the future?**

The second and third questions only presented methods selected in the first question. Nine different methods were presented, with the option to report other methods too. The first option given was “manual coding (e.g. in Excel)” in order to avoid inclusion of Excel, which has no specific support for text analysis or understanding of survey data, in amongst semi-automated methods, which are specific to the task.

Beyond the automated or semi-automated methods (which rely on human intervention and use technology only to organise the work in order to ease the process of classification or interpretation), the methods can be grouped into those that offer simple/shallow analysis, with little in the way of meaning extraction, and those that offer in-depth or interpretive analysis based upon various different methods of computer-based meaning extraction:

<table>
<thead>
<tr>
<th>Shallow methods</th>
<th>Deep methods</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Semi-automated coding</td>
<td>Topic analysis</td>
<td>Crowdsourcing</td>
</tr>
<tr>
<td>System to assist with the organisation and presentation of text which leaves the classification decision to the human coder</td>
<td>Dictionary-based methods based that can identify and categorise topic or theme of answers given</td>
<td>Methods that divide the coding or analysis task into many microtasks that are then undertaken by a large number of people on the Internet, usually in return for small reward.</td>
</tr>
<tr>
<td>Word frequency distributions</td>
<td>Sentiment analysis</td>
<td></td>
</tr>
<tr>
<td>Statistical counts of discrete words (and sometimes short phrases) found</td>
<td>Dictionary-based methods that can identify positivity, negativity or emotional content</td>
<td></td>
</tr>
<tr>
<td>Word clouds</td>
<td>Text analytics/text mining</td>
<td></td>
</tr>
<tr>
<td>Graphical device for displaying word frequency distributions</td>
<td>Discovery methods using a range of statistical methods to identify and organise textual responses</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Trainable automated coding</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Machine learning methods in which text is analysed or categorised by reference to a large set of example answers</td>
<td></td>
</tr>
</tbody>
</table>

Beyond the automated or semi-automated methods (which rely on human intervention and use technology only to organise the work in order to ease the process of classification or interpretation), the methods can be grouped into those that offer simple/shallow analysis, with little in the way of meaning extraction, and those that offer in-depth or interpretive analysis based upon various different methods of computer-based meaning extraction:
Crowdsourcing is effectively *sui generis* as a method, as it is dependent upon the task assigned to the members of the ‘crowd’.

### 3.2.1 Current methods

![Method use chart](chart.png)

- The no-technology and low-technology methods of manual coding and semi-automated coding are the most frequently used methods.
- Technical solutions occupy a secondary role among most firms’ analysis methods.
- After semi-automated coding, it is the two other shallow analytical methods that occupy third and fourth place in terms of frequency of use: word clouds and word frequency distributions.
- All the deep analytical methods are used by 20% of companies or fewer, and are in frequent use by only a handful of companies.
- There seems to be little appetite for crowdsourcing text analysis or text coding tasks. This is the only method that is used by less than 10% of companies.
3.2.2 Methods envisaged in the future

We have compared the “ever use” category of the current usage with predictions of importance of the method in future.

- Manual coding is predicted to shrink by almost two-thirds.
- Semi-automated coding is expected to reduce very slightly.
- All the shallow methods are predicted to decline in importance.
- Though Crowdsourcing has the highest predicted growth, its impact is still modest, up to 5% anticipated use.
- Text analytics and text mining – which is a discovery method best suited to online qualitative and social media type situations – is tipped by the most and is predicted to double in importance.
- After this, trainable automated coding is slated for the highest growth, followed by sentiment analysis and topic analysis.
- Intriguingly, 7% of companies have other plans, to use methods not in our list.

**Figure 12 Methods used to handle unstructured text: future use**
3.2.3 Ease or difficulty of current solutions

<table>
<thead>
<tr>
<th>Region</th>
<th>Very easy</th>
<th>Moderately easy</th>
<th>Neither easy nor difficult</th>
<th>Moderately difficult</th>
<th>Very difficult</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large</td>
<td>7%</td>
<td>26%</td>
<td>26%</td>
<td>33%</td>
<td>7%</td>
</tr>
<tr>
<td>Medium</td>
<td>5%</td>
<td>24%</td>
<td>32%</td>
<td>30%</td>
<td>8%</td>
</tr>
<tr>
<td>Small</td>
<td>5%</td>
<td>25%</td>
<td>25%</td>
<td>36%</td>
<td>8%</td>
</tr>
<tr>
<td>Asia Pac</td>
<td>5%</td>
<td>33%</td>
<td>26%</td>
<td>28%</td>
<td>8%</td>
</tr>
<tr>
<td>Europe</td>
<td>7%</td>
<td>27%</td>
<td>30%</td>
<td>26%</td>
<td>9%</td>
</tr>
<tr>
<td>North America</td>
<td>5%</td>
<td>19%</td>
<td>26%</td>
<td>45%</td>
<td>6%</td>
</tr>
<tr>
<td>Total</td>
<td>6%</td>
<td>25%</td>
<td>28%</td>
<td>33%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Figure 13 Level of ease or difficulty in handling unstructured text with the tools available

<table>
<thead>
<tr>
<th>Issue</th>
<th>All mentions</th>
<th>Top mention</th>
</tr>
</thead>
<tbody>
<tr>
<td>We do not have the right tools for effective text analysis</td>
<td>47.6%</td>
<td></td>
</tr>
<tr>
<td>The quality of analysis from automated methods is not good enough</td>
<td>45.2%</td>
<td></td>
</tr>
<tr>
<td>It takes too much time</td>
<td>36.5%</td>
<td></td>
</tr>
<tr>
<td>Clients are unwilling to pay for the work required</td>
<td>31.3%</td>
<td></td>
</tr>
<tr>
<td>The raw data are often of poor quality to start with</td>
<td>27.9%</td>
<td></td>
</tr>
<tr>
<td>The raw data are often badly organized or structured, making them difficult to handle</td>
<td>22.1%</td>
<td></td>
</tr>
<tr>
<td>Researchers are distrustful of automated methods</td>
<td>21.6%</td>
<td></td>
</tr>
<tr>
<td>It requires specialized skills that are hard to find</td>
<td>18.3%</td>
<td></td>
</tr>
<tr>
<td>The analysis tools on offer are not relevant to market research data</td>
<td>12.0%</td>
<td></td>
</tr>
<tr>
<td>Clients are distrustful of automated methods</td>
<td>9.6%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>5.8%</td>
<td></td>
</tr>
</tbody>
</table>

Figure 14 Difficulties experienced when handling large amounts of unstructured text
3.3 Conclusions

There has been considerable debate about the effectiveness of automated methods, particularly the deep methods that make interpretive decisions on behalf of the researcher. It is fair to say that even the best of the methods cannot do as good a job as an experienced, well-trained and well-disciplined human coder or analyst. However, this does not address the more fundamental problem that around one half of research firms are experiencing an increase in the volume of unstructured data they are having to deal with – and it is unlikely that they have additional human resources to be able to deal with this rising tide of data. The risk is that much of these data are wasted due to lack of time or resource to analyse it, and that potential findings and insights remain undetected. We suspect this is very common, across the industry.

We consider the ideal solution is to use a blended approach, combining human intervention and oversight with automated methods – so that some of the initial organisation can be carried out in an automated way, and that the analyst is then able to work with these tools to perform initial categorisation and detection of trends, and focus effort where interpretation is required.

The survey has revealed very low levels of adoption of technologies that will help researchers to manage this task better. Those that are cited are at the low-tech end of the scale, and in terms of utility, tend to offer shallow analysis of text.

The deep analysis methods, which are harder to implement, and to some, more controversial in their suitability, do not feature very much in recorded levels of current use. However, these are the methods that are favoured by our sample of companies, for the future, in dealing with the growing volume of unstructured text data.

Furthermore, with 61% of companies reporting difficulties in the analysis of these kinds of data, and almost half of companies stating that they consider they do not have the right tools to perform effective text analysis, it appears that the industry at large has an unsolved problem in relation to the growing tide of unstructured textual data arising from research projects: one which technology should be able to resolve, with a little more effort on the part of both research companies and technology providers.
4 ‘New MR’ methods

‘New MR’ is a portmanteau term that has achieved widespread coverage at industry events and in the specialist MR media. It describes a collection of novel market research methods based largely around the growth of social media and related developments in web-based technologies. New MR has, for example, spawned two active Linked-In groups and a virtual web-based conference.

Referring to events and the discussion topics in New MR online forums, we identified what appear to be seven frequently mentioned New MR methods. We excluded behavioural economics, which is also mentioned, as this does not appear to have specific technical demands that are not met by existing research methods, and also mobile research, which is oft-discussed in the New MR forums, as we have reported on this topic in previous years.

We therefore identified the following methods as belonging to ‘New MR’ and each having distinctive technological requirements, for inclusion in our research for the 2011 MR Software Survey:

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MROCs or Online Communities</td>
<td>Market research online communities, also described by some as ‘socialised panels’ and others as walled gardens in the social media landscape, which are tended by market researchers.</td>
</tr>
<tr>
<td>Web scraping</td>
<td>Identifying and extracting relevant existing content from social media sites, blogs, Facebook and Twitter as source data for analysis. A method that is analogous to conventional desk research in today’s online environment.</td>
</tr>
<tr>
<td>Co-creation</td>
<td>Using online activities, typically within a survey context such as among a panel, community or recruited group, which allow for collaborative creative endeavour, such as creating new concepts, products or designs, where interaction between participants is a characteristic of the activity.</td>
</tr>
<tr>
<td>Digital ethnography</td>
<td>In depth studies of individual research subjects or families in their normal domestic environment or in the context of their everyday life, usually based on auto-ethnography, involving the capture of data using web-based technologies such as digital photography and video, online diary writing or blogging etc.</td>
</tr>
<tr>
<td>Crowd-shaped questionnaires</td>
<td>Adaptive questionnaires based on heuristic analysis of prior response so as to alter or reduce the questions asked, the order or the wording of questions in response to previous answers given, for the purpose of increasing the depth of the research and/or to reducing individual burden on respondents.</td>
</tr>
<tr>
<td>Neuroscience</td>
<td>Collection and interpretation of data based upon neural impulses and brain activity, by relating this to stimulus material provided to the subject and/or questions asked in a more conventional survey context. Of the methods listed here, this is the only method which is not web-based.</td>
</tr>
<tr>
<td>Synthetic respondents</td>
<td>Also known as digital respondents or avatars: where a software program simulates an online individual, which is given a created</td>
</tr>
</tbody>
</table>
persona. The software program may then interact with other individuals online or other websites, who will be unaware that these interactions are automated and not from an actual person. Data are then collected from these encounters with websites and/or other online individuals for analysis and interpretation.

4.1 New MR methods in use

Our first series of questions on ‘New MR’ methods relates to the specific methods being offered by each company. We asked

_to what extent is your company engaging with any of these New MR methods?

for each of the seven methods identified, offering four answer options:

1. [We] provide to many clients
2. [We] provide to a few clients
3. [We are] experimenting or evaluating
4. [We are] unlikely to offer

In Figure 15, we have ranked the answers by those most frequently provided: the questions were presented in a randomized order.

Though not shown on the chart, due to lack of space, the proportion of firms providing Crowd-shaped questionnaires, Neuroscience and Synthetic respondents was each below 1%, and no-one claimed to be providing Digital Ethnography to many clients.

We will examine and provide commentary on each method in turn.

<table>
<thead>
<tr>
<th>Method</th>
<th>Provide to many clients</th>
<th>Provide to a few clients</th>
<th>Experimenting/evaluating</th>
<th>Unlikely to offer</th>
</tr>
</thead>
<tbody>
<tr>
<td>MROCs</td>
<td>9%</td>
<td>22%</td>
<td>39%</td>
<td>30%</td>
</tr>
<tr>
<td>Web scraping</td>
<td>2%</td>
<td>18%</td>
<td>43%</td>
<td>37%</td>
</tr>
<tr>
<td>Co-creation</td>
<td>3%</td>
<td>13%</td>
<td>33%</td>
<td>51%</td>
</tr>
<tr>
<td>Digital ethnography</td>
<td>19%</td>
<td>27%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>Crowd-shaped q’aires</td>
<td>8%</td>
<td>33%</td>
<td>58%</td>
<td></td>
</tr>
<tr>
<td>Neuroscience</td>
<td>8%</td>
<td>20%</td>
<td>70%</td>
<td></td>
</tr>
<tr>
<td>Synthetic respondents</td>
<td>5%</td>
<td>17%</td>
<td>77%</td>
<td></td>
</tr>
</tbody>
</table>

Figure 15 Levels of adoption of New MR methods and tools (N=230)
4.1.1 Market research online communities

- Online Communities is the dominant New MR ‘tool’ with 31.3% providing it to many or fewer clients.
- This activity appears to have doubled in the last two years. When we asked a similar question for the 2009 survey (with an equivalent sample), whether they were at that time operating any online communities, 17% indicated they were, 27% claimed they had one or more communities ‘in development’ and 56% said they had ‘no plans’ to offer one.
- The 56% majority who in 2009 had ‘no plans’ to operate communities has now dropped to below a third of companies (30%) who claim they are ‘unlikely to offer’ communities.
- There is no global hot-spot for communities: the regional variations observed are very minor.
- Company size appears to be a strong factor in whether communities are provided or not, and the extent to which they are provided. 45% of large firms, against 23% of small firms are doing them against. 19% of large firms provide them to many clients; only 4% of small firms do. This is unsurprising, considering the investment in both technology and human resources in order to operate them.

4.1.2 Web scraping

- After MROCs, Web scraping the second most popular New MR method, with 20% adoption across all research companies.
- Of all the methods it is the one attracting the most experimentation at present, with 43% of firms claiming to be ‘experimenting with or evaluating’ the method.
- While only 2% of firms currently offer it to ‘many clients’, this rises to 7% among large firms.
- There is little variation in uptake by global region.
4.1.3 Co-creation

- Co-creation is the third most popular method, roughly occupying a similar place to in terms of adoption, it is practised by 13% of research firms.
- However, one in three research firms (33%) are experimenting with it or evaluating it.
- Very few firms are offering it to ‘many clients’ – only seven companies in our sample, or 3%.
- There appears to be a little more adoption and experimentation in Asia Pacific. Unlike most new methods, this one is least popular in North America.
4.1.4 Digital ethnography

- Digital is the third most popular method, roughly occupying a similar place to co-creation in terms of adoption. It is practised by 19% of research firms, and a further 27% are experimenting with it or evaluating it.

- However, only one company in the entire sample is providing digital ethnography as a method to 'many clients', which implies that it is rarely taken up by clients.

- It is a method that 40% of large companies provide and only 17% say they won’t.

- Digital ethnography is a labour-intensive activity, and it is not surprising that only 10% of small companies undertake it, and 71% say they are unlikely to offer it.

- There is little variation in uptake by global region.

4.1.5 Crowd-shaped questionnaires

- The crowd-shaped or adaptive questionnaire has reached only one in ten research firms overall (9.2%), though another third (32%) are experimenting or evaluating the method.
• As with many of these novel methods, it is to be found largely in the hands of larger companies (23% adoption), or by niche players among the smaller and medium-sized research firms,

• 58% of firms overall have no intention of embracing the crowd-shaped questionnaire,

• There is little variation in uptake by global region.

Figure 21 Adoption of crowd-shaped questionnaires by company size

4.1.6 Neuroscience

• Another method with a small number of adopters: with 9.1% of firms overall offering the method, and just 1.3% claiming to provide it to ‘many clients’, it is the second least popular of New MR methods

• 70.5% of companies have no plans to add neuroscience to their toolkits, and this rises to 79% of small firms.

• Adopters and experimenters are to be found in over half the large research companies, with 26% currently providing the method to clients and a further 29% experimenting or evaluating the method. That still leaves 45% of large firms not considering neuroscience.

Figure 22 Adoption of neuroscience by company size
4.1.7 Synthetic respondents

- The use of synthetic respondents is the least popular of the New MR methods, which is not surprising in an inherently cautious industry, for a method which has attracted some controversy. It is an activity that raises ethical concerns over informed choice on the part of research participants.

- It is a method that is in the hands of a few specialists. Only 6.1% of companies offer this method overall and only two companies in the sample (0.9%) are providing it to 'many clients'.

- Three-quarters (76%) are not even considering offering synthetic respondents.

- Among large companies, around a quarter do offer this method (26%), though only 5% to 'many clients'.

- Close to three-quarters of medium-sized companies (73%) and almost all small companies (89%) are unlikely to offer this method.

- There appears to be more experimentation and adoption with synthetic respondents in the Asia Pacific region, with 15% providing it and another 28% at least open to the method.

Figure 24 Adoption of synthetic respondents by company size
4.2 New MR vs Old MR

Proponents of New MR have predicted that it will displace and may eventually replace conventional research, particularly in an online context. We examined the extent to which any such change appears to be under way at present, in a series of questions exploring the current amount of work that embraces New MR methods, our participants’ predictions for the future share of New MR, and the effect this is perceived as having on conventional ‘Old MR’.

4.2.1 Current amount of research based on New MR

The specific question we asked was

*Overall, what proportion of your research today is based on New MR methods?*

with the response given as a percentage from 0 to 100.

In response, the share of New MR is claimed to be slightly over nine per cent (9.1%) of all MR. This figure is derived from the average of all the proportions given.

We consider an estimate of nine per cent for the amount of New MR work undertaken to be high, when compared with other questions we have asked in previous years about novel methods.

By comparison, the amount of work based on mobile research stands at less than one per cent still as it has been in previous years, and even mixed-mode research, as a methodology, accounts for around seven per cent of work. In 2009, when we asked about the prevalence of Online Communities, though 17% of companies were active in this method, the actual incidence was very low – below three communities per company. Communities are typically client-specific, so this is analogous to three or less actual projects.

We suspect that a degree of overstatement may be occurring, as we did not ask participants to make an objective analysis of revenues derived from these methods (we judged this would be to difficult to do in the context of this survey). However, later questions reveal that much of the New MR work derives from MROCs. These tend to be large-scale activities, and if research companies have managed to grow this area of business
since we last examined it in 2009, as seems likely, then it is possible that the MROC is becoming an important contributor to revenues for research companies.

<table>
<thead>
<tr>
<th>2011</th>
<th>Total</th>
<th>North America</th>
<th>Europe</th>
<th>Asia Pac</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>9.1%</td>
<td>9.1%</td>
<td>8.2%</td>
<td>11.4%</td>
<td>7.0%</td>
<td>10.4%</td>
<td>12.3%</td>
</tr>
<tr>
<td>N</td>
<td>230</td>
<td>85</td>
<td>106</td>
<td>39</td>
<td>114</td>
<td>74</td>
<td>42</td>
</tr>
</tbody>
</table>

Table 4 Proportion of all research that is now based on New MR methods

New MR methods are more prevalent in the Asia Pacific region and among larger companies. We do not weight the data by company size, but bearing in mind that large companies account for a much larger share of revenues, any weighted figure that did account for company size would certainly sit closer to 12% than 9%.

4.2.2 Expected change in amount of New MR

We also asked “How do you anticipate this proportion will change in the next 1-2 years?”

<table>
<thead>
<tr>
<th></th>
<th>Increase a lot</th>
<th>Increase a little</th>
<th>Remain the same</th>
<th>Decrease</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large</td>
<td>29%</td>
<td></td>
<td>67%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Medium</td>
<td>28%</td>
<td></td>
<td>55%</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>Small</td>
<td>20%</td>
<td></td>
<td>58%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Total</td>
<td>24%</td>
<td></td>
<td>59%</td>
<td>7%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Figure 26 Anticipated change in the amount of New MR methods in the next one to two years, by company size

- New MR is clearly seen as an important growth area for the MR industry as a whole. Across all companies, 83 per cent anticipate growth (and a quarter anticipating a lot of growth): the proportions varied little by global region.
- Those in large companies showed most certainty about the future of New MR with 95% backing growth. Small companies were the most cautious, though even here, 78% anticipate growth, and a fifth (20%) a lot of growth.

4.2.3 Reduction in conventional quantitative research

We wanted to know if this growth was at the expense of conventional quantitative MR, or represented real growth in opportunity for the industry. Proponents of New MR have stated that conventional quantitative MR faces decline in the future – some even go as far as to predict its extinction. In this context, New MR could be viewed as an alternative or replacement for quantitative, and particularly online quantitative research, in future.
We focused on one aspect of this, and asked:

*Have you experienced any reduction in the amount of conventional quantitative research you do?*

Our question made no explicit reference to New MR, though it followed other questions in which New MR was the subject. We provided four answer choices:

1. Yes, a big reduction
2. Yes, a small reduction
3. No change
4. No, is continuing to grow

![Figure 27 Revenue trends for conventional quantitative research work, by region](image)

- One third say it is in decline: most (24%) citing a *small reduction*.
- 38% say it is having no overall effect in either direction.
- North America has the largest proportion who see volumes of conventional quant actually rising (42%).
- Asia Pacific is reporting the sharpest declines. It is also the region reporting the largest growth in New-MR, which implies that there is a replacement effect there.

This division becomes more apparent if the ‘no change’ group is omitted, and growth is contrasted with decline (both big and small reduction together).

![Table 5 Effect of new-MR: generating new business or coming from existing business](table)

We consider it is valid to interpret these values in the context of the emergence of New MR as an influential factor in this change – although it is not the only factor. While these figures do not show the extent to which New MR is cannibalising existing revenues – that was not the question we asked – we consider it highly indicative of that trend. In particular:
Across the industry as a whole, it hangs in the balance between those observing conventional quant revenues slide against those seeing growth still, with 31% on each side.

Asia Pacific, which is reporting the largest amount of New MR activity is also the region reporting conventional quant revenues suffering the steepest decline (46% report decline).

Unusually, small and large MR firms reach a similar consensus that balance is tipped towards decline (32% and 31%) rather than continued growth (26% for both).

It is the medium-sized companies and also the companies in North America see growth outstripping decline.

4.2.4 Reasons attributed to the reduction in conventional quant

We followed this with a question in which we asked the 71 companies that reported an actual decline what the reduction was attributed to. We offered New MR as one of seven different reasons, and participants could select as many reasons as they wished.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clients budgets smaller</td>
<td>68%</td>
</tr>
<tr>
<td>Economic uncertainty</td>
<td>56%</td>
</tr>
<tr>
<td>Clients switch to new MR</td>
<td>52%</td>
</tr>
<tr>
<td>Clients doing own research</td>
<td>46%</td>
</tr>
<tr>
<td>Increased competition</td>
<td>41%</td>
</tr>
<tr>
<td>Clients switch to non-MR insight</td>
<td>28%</td>
</tr>
<tr>
<td>Something else</td>
<td>6%</td>
</tr>
</tbody>
</table>

Figure 28 The reasons attributed to a reduction in conventional quantitative research (N=71)

- **Clients switching their work to New MR** was cited by slightly more than half the sample (52%): it was the third most popular reason but it was the most popular research-specific reason given.

- **Clients reducing the size of their research budgets** was the most popular reason given, cited by two thirds (68%)

- **General economic uncertainty** came slightly ahead of switching to New MR, with 56% giving this reason.

- Slightly less than one half of this small subset mentioned clients doing their own research (46%) as the reason.
We are aware of the limitations of this question, however, as the ideal research subjects for this question would be the clients themselves. Nevertheless, we consider it provides some useful clues to the extent to which New MR is either cannibalising existing conventional quant research, and risks undermining it, or is providing an opportunity for MR to grow as a whole.

4.3 Conclusions

For an industry which is often deliberately cautious in its adoption of new methods or approaches, the group of methods known as ‘New MR’ seems to have been welcomed and adopted much more rapidly than other technological changes in the past.

In detail, however, the majority of ‘New MR’ activity seems to be centred around research communities, many of which have been spawned from panels, or panel-type activity, and web-scraping or the use of social media websites as a base for passive observation. Regulatory concerns by professional bodies such as ESOMAR and MRS may curtail researchers’ use of these sources in future, however, which does cast a cloud over this and other areas of New MR.

The majority of New MR methods that receive attention on conference platforms and in the research media and blogspace are still exotic for most research companies and are likely to remain so well into the future.

In our view, the indications across several of our questions seems to be that some work is switching to New MR, but that other factors are at work too, making it no more than a contributory factor in changes that are taking place. Furthermore, some sectors of the industry report no decline at all in their conventional research, such as North America, where growth is continuing. There is perhaps reason for some optimism that New MR may provide a genuine opportunity for growth for MR, and in doing so, revitalise more conventional areas of work too.
5 Smartphones and other small-format mobile devices

While much of the attention of the research industry is focused on how researchers can use mobile technologies such as smartphones, tablets and iPads to collect data, less attention has been paid to the participants who are already using this technology to access conventional online quantitative surveys. Unless a survey has been adapted to work with a mobile device, the survey experience for the participant will be severely compromised, and the respondent may be forced to abandon their interview after a few questions.

We had reason to believe that research companies are not fully aware of the consequences, and may not be taking active counter-measures to ensure that the quality of their data, or survey response is not compromised. From other research we have done, we are aware that some online research software providers have been slow to develop technology-based solutions for this problem, while others are providing mixed-mode support so the survey will adapt automatically or semi-automatically to render questions and responses more appropriately on devices with limited screen-space.

One strategy is to adapt, or allow the survey to adapt so that it renders reasonably well on a small-format device, though this can be costly and time-consuming to do if using software that offers no in-built support for this. An alternative is to detect then disallow response from such devices, and encourage participants to participate on a large-screen device (or possibly a tablet) where performance will not be compromised. However, this can have a detrimental effect on sample composition if the number being excluded is large.

We therefore inserted two questions on this subject into the 2011 study.

5.1 Usage of smartphones and other mobile devices

We asked:

Thinking just about your web surveys, what proportion of participants are taking these surveys on small format mobile devices such as smartphones?

<table>
<thead>
<tr>
<th>2011</th>
<th>Total</th>
<th>North America</th>
<th>Europe</th>
<th>Asia Pac</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone usage on Web surveys</td>
<td>6.7%</td>
<td>6.7%</td>
<td>5.6%</td>
<td>9.6%</td>
<td>5.4%</td>
<td>7.1%</td>
<td>9.4%</td>
</tr>
<tr>
<td>N</td>
<td>224</td>
<td>85</td>
<td>104</td>
<td>39</td>
<td>113</td>
<td>72</td>
<td>39</td>
</tr>
</tbody>
</table>

Table 6 Proportion of participants taking Web surveys on small format mobile devices such as smartphones

---

1 Tim Macer (2011), Making it fit: how survey technology providers are responding to the challenges
Companies claim that 6.7% of their survey-takers are using smartphones or small mobile devices to complete surveys.

There is quite some variation by company size and region, with large companies and those in Asia Pac reporting figures of 9.4% and 9.6% respectively.

5.1.1 Comparisons with survey paradata

For comparison, by referring to the survey’s paradata, we observed that 3.5% of those who attempted to take this survey used a smartphone or iPad; but only 3 people or 1.3% of our sample, used a mobile device to complete the survey. The survey had been adjusted to allow for effective access from a mobile device and tested on a range of smartphones.

We also asked our sponsor, Confirmit, whose servers handle many millions of surveys for their customers on a monthly basis, for the equivalent actual measures across all of these surveys. They report that for the period from 1 January to 31 October 2011, ‘unique visits’ (which equates to our survey attempt figure) on mobile devices was 2.97% on their North American servers and 1.84% for their European servers.

5.1.2 Over- or under-reporting?

Clearly, there is a discrepancy with the reported figures and the observed figures. Possible explanations for this situation are that:

- Researchers are unaware of the actual figure, and have over-estimated the value
- Researchers are reporting to us the figure at the end of the period (close to December 2011), which is higher than the data from Confirmit.
- The characteristics of the surveys undertaken by research companies, which are predominated by panel members, have a greater tendency to be using mobile technology than the universe of surveys conducted by Confirmit’s research company and corporate customers.

5.2 Survey design for smartphones

We asked:

*What approach do you generally take when designing online surveys with respect to participants that might choose to take them on smartphones and other mobile devices?*
Figure 29 Approach towards smartphone users when designing online surveys

- Most companies do not take smartphones into consideration. Many (62%) either do not have a policy or do not bother to modify surveys for smartphones. Only 15% adjust their surveys for smartphones.
- Larger companies are more likely to adjust their surveys for smartphones – 21% of them do so compared with 10% of small companies.
- Companies in Asia Pac are also more likely to adjust the surveys – 26% of them do so. In Europe and North America, only 13% adjust the surveys.
- Nobody is taking advantage of the opportunity to route mobile participants to a different survey, as a means of either maintaining engagement among willing participants or collecting other useful data, or at least comparative data about what may be a ‘non response’ group.

<table>
<thead>
<tr>
<th>Approach towards smartphone users</th>
<th>2011 Total</th>
<th>North America</th>
<th>Europe</th>
<th>Asia Pac</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route them to another</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>survey</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exclude them</td>
<td>7%</td>
<td>11%</td>
<td>3%</td>
<td>11%</td>
<td>8%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Allow, and adjust surveys</td>
<td>15%</td>
<td>13%</td>
<td>13%</td>
<td>26%</td>
<td>10%</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>Approach varies by project</td>
<td>16%</td>
<td>15%</td>
<td>16%</td>
<td>14%</td>
<td>12%</td>
<td>13%</td>
<td>33%</td>
</tr>
<tr>
<td>No overall policy</td>
<td>30%</td>
<td>29%</td>
<td>33%</td>
<td>26%</td>
<td>36%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Allow, without modifying surveys</td>
<td>32%</td>
<td>32%</td>
<td>36%</td>
<td>23%</td>
<td>35%</td>
<td>36%</td>
<td>18%</td>
</tr>
<tr>
<td>N</td>
<td>224</td>
<td>85</td>
<td>104</td>
<td>39</td>
<td>113</td>
<td>72</td>
<td>39</td>
</tr>
</tbody>
</table>

Table 7 Approach towards smartphone users when designing online surveys by region and company size
5.3 Conclusions

We seem to have detected some complacency across the industry on the issue of participants taking surveys on mobile devices which have not configured for access on mobile devices. We are grateful for the candour of our participants in the observations they made. It concerns us that roughly one third of contributors will allow participants to attempt surveys not optimised for mobile use. The result of allowing this is well-documented² with the consequences of a high abandon rate among this subsample, or data which are at variance with other responses because of the difficulty in accessing all of the answer options.

Clearly, research companies need to pay more attention to this issue, as the proportion is increasing each year, and over time, this quality issue will affect an increasing share of the sample of any online survey. It is also an area where the research profession may be reinforcing an image that it is uncaring about its participants, by not providing a satisfactory experience for those who choose to participate on a mobile device.

It also seems a pity that this rare occasion to collect some limited information about non-responders and the characteristics of that subsample (those being excluded by virtue of using a smartphone device), is being overlooked. Nobody claimed to be sending mobile responders to a different survey to find out more about them.

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6 Data visualization

6.1 Growth in demand for data visualization

In order to assess the real extent of growing demand for more advanced data visualization, that goes beyond simple Excel or PowerPoint charts, we asked:

*Are you experiencing a growth in demand for data visualization that goes beyond simple charting?*

![Figure 30 Growth in demand for data visualization beyond simple charting](chart)

- The majority of firms (80%) expect demand for data visualization to continue to increase, and over a quarter (27%) expect increased demand to be strong.
- There is a very noticeable difference by company size – the larger the company, the more likely they are to say that data visualization is growing.
- Regional differences are minor.

6.2 Software used for data visualization

As this is an area that is not necessarily well-served within the current tools used in market research companies – neither Office tools nor the specialist tabulation and reporting tools – we asked a series of questions to determine the extent to which a series of tools were used for data visualisation:

1. *Charting capabilities within Microsoft Excel and PowerPoint*
2. Charting or dashboard capabilities within the survey tabulation software that your company uses
3. Market research chart automation software (e.g. E-tabs, Rosetta Studio)
4. Specialist Charting software (e.g. Dundas, Chart FX)
5. Specialist Digital Dashboard creation software
6. Other tools

The following answer options were provided:

1. Usually
2. Sometimes
3. Don’t use
4. Don’t know

![Chart showing software in use for data visualization – overview of methods used](image)

Figure 31 Software in use for data visualization – overview of methods used

- In the majority of cases, research companies are not venturing beyond the very conventional data visualization methods offered by either Microsoft Office tools (which is by far the majority method cited) or the charting tools offered within the data analysis package they used (the second most popular option).
- Specialist visualization tools remain a minority interest
- Despite the growing demand reported earlier for dashboard reporting, dashboard tools are used to some extent in a third of companies, but are in common use by a handful of firms (7%).
- Nearly half of companies are using a wide range of other tools, including those developed by themselves, to tackle this problem.
- Specialist charting tools, which many would argue offer the greatest freedom when visualising data, are cited by just one in five market research companies, and only 3% (actually just seven companies) claim that they usually use these tools when creating data visualizations.
- In all cases, the larger the company, the more frequent use it made of data visualization tools (which can be seen in subsequent charts)

We will now present each of these methods, analysed by company size and, where appropriate, global region.
6.2.1 Charting capabilities within Microsoft Excel and PowerPoint

<table>
<thead>
<tr>
<th></th>
<th>Usually</th>
<th>Sometimes</th>
<th>Don’t use / don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>81%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Small</strong></td>
<td>76%</td>
<td>18%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Medium</strong></td>
<td>81%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Large</strong></td>
<td>93%</td>
<td>7%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Figure 32 Microsoft Excel and PowerPoint as a data visualization method

- Most companies usually use Microsoft Excel and PowerPoint.
- Among large companies, all said they used these tools
- These are the most frequently used tools for data visualization

6.2.2 Charting/dashboard capabilities within survey tabulation software

<table>
<thead>
<tr>
<th></th>
<th>Usually</th>
<th>Sometimes</th>
<th>Don’t use / don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>44%</td>
<td>32%</td>
<td>24%</td>
</tr>
<tr>
<td><strong>Small</strong></td>
<td>40%</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td><strong>Medium</strong></td>
<td>38%</td>
<td>50%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Large</strong></td>
<td>36%</td>
<td>45%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Figure 33 How often charting or dashboard capabilities within survey tabulation software as a data visualization method

- Considering virtually all market research companies must have tabulation software, this seems relatively unpopular.
Although, after charting in Excel and PowerPoint, this is the second most frequently used option.

### 6.2.3 Specialist digital dashboard creation software

![Figure 34](image_url) Specialist digital dashboard creation software as a data visualization method

- Digital dashboard creation software is the third most frequently used option.
- Among large companies, it is actually used with about the same frequency as charting or dashboard capabilities within tabulation software. However, medium and small companies are not using these tools at the same rate as the tools within tabulation software. This suggests that large companies are blazing a trail with this relatively new type of tool.

### 6.2.4 Market research chart automation software

Examples of chart automation software include E-tabs and Rosetta Studio.

![Figure 35](image_url) Market research chart automation software as a data visualization method
These tools are widely used by large companies, with almost half (48%) saying they use them, and also the mid-sized companies, but rarely used by small companies (11%).

6.2.5 Specialist charting software

Examples of specialist charting software include Dundas and Chart FX.

These tools seem to have little foothold in the market research industry, with most companies not using this type of software at all.

Figure 36 Specialist charting software as a data visualization method
6.3 Who produces data visualizations

We asked:

Who typically produces any data visualizations required?

---

**Figure 37 The people who create visualizations, by company size**

- Within all sizes of company and all regions, it is researchers and research assistants who are most likely to produce data visualizations.
- Programmers or IT specialists also frequently produce visualizations. However, it is apparent that some companies are passing on some of their visualization work to experts, including charting specialists, graphic artists and visual designers.
- The larger the company, the more likely it is that ‘visualization experts’ will be used. Over a third (36%) of large companies use charting specialists, over a fifth (21%) employ graphic artists and over a sixth (17%) use visual designers.
Asia Pac appears to be the region that is most likely to turn to visualization experts and Europe is least likely to do so – over two-fifths (41%) of companies in Asia Pac use charting specialists compared with 15% in Europe. Similarly, in Asia Pac, far more companies use graphic artists and visual designers.

Indeed Europe seems somewhat less advanced because it is notable that in that region researchers and research assistants are far more likely to be creating visualizations than in Asia Pac or North America.
6.4 Challenges faced (open question)

Our last question in this section was an open question:

*What are the main challenges you experience in data visualization?*

We present this as a word cloud, followed by post-hoc coded frequencies:

**Figure 39 Challenges faced when visualizing data: open question shown as a word cloud**

<table>
<thead>
<tr>
<th>Challenges faced when visualizing data: open question shown as a word cloud</th>
<th>All asked this question</th>
<th>226</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software limitations (net)</td>
<td>Software limitations (net)</td>
<td>226</td>
<td>100%</td>
</tr>
<tr>
<td>Limitations in the software used</td>
<td>Limitations in the software used</td>
<td>45</td>
<td>20%</td>
</tr>
<tr>
<td>Specifically, limitations of Excel and PowerPoint</td>
<td>Specifically, limitations of Excel and PowerPoint</td>
<td>27</td>
<td>12%</td>
</tr>
<tr>
<td>Specialist software needed but not available</td>
<td>Specialist software needed but not available</td>
<td>14</td>
<td>6%</td>
</tr>
<tr>
<td>Time, speed to produce, the amount of effort involved</td>
<td>Time, speed to produce, the amount of effort involved</td>
<td>8</td>
<td>4%</td>
</tr>
<tr>
<td>Lack of specific creative or design skills</td>
<td>Lack of specific creative or design skills</td>
<td>38</td>
<td>17%</td>
</tr>
<tr>
<td>Design challenges in handling complexity in data</td>
<td>Design challenges in handling complexity in data</td>
<td>23</td>
<td>10%</td>
</tr>
<tr>
<td>Meeting client expectations/ unrealistic goals</td>
<td>Meeting client expectations/ unrealistic goals</td>
<td>20</td>
<td>9%</td>
</tr>
<tr>
<td>Difficulties in handling market research data formats and requirements</td>
<td>Difficulties in handling market research data formats and requirements</td>
<td>12</td>
<td>5%</td>
</tr>
<tr>
<td>Risks and challenges in retaining integrity and understanding of the data</td>
<td>Risks and challenges in retaining integrity and understanding of the data</td>
<td>10</td>
<td>4%</td>
</tr>
<tr>
<td>Software or process integration</td>
<td>Software or process integration</td>
<td>9</td>
<td>4%</td>
</tr>
<tr>
<td>Cost</td>
<td>Cost</td>
<td>6</td>
<td>3%</td>
</tr>
<tr>
<td>Responding to individual needs of each client or user</td>
<td>Responding to individual needs of each client or user</td>
<td>6</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>Other</td>
<td>3</td>
<td>1%</td>
</tr>
<tr>
<td>No specific problems</td>
<td>No specific problems</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>No answer given</td>
<td>No answer given</td>
<td>89</td>
<td>39%</td>
</tr>
</tbody>
</table>

**Figure 40 Challenges faced when visualizing data: coded verbatim responses**
Out of 226 asked the question, 135 chose to enter an open text response

The largest focus for challenges and difficulties is with the software, which in turn falls into three categories: limitations in the software, such as specific functions not supported or other difficulties in the tools being used formed the largest subset, followed by 14 specific mentions of limitations in Excel and PowerPoint for charting. The third group of software-related issues was in not having access, or non-availability of the right software to do support the task.

After this, time, productivity and the slowness of the task compared with the speed by which work must be produced was the second greatest concern.

The third most frequent concern was the lack of skills, either in the researcher, or available within the company or team, to work visually and creatively with data. Related to this, the inherent difficulty of visualizing and modelling complex data, especially multi-factorial market research data was also a concern for some, as was the challenge of simplifying data while still retaining its integrity and not opening it to misinterpretation.

Another set of challenges were external and client-driven, many of which we grouped as ‘meeting client expectations/unrealistic goal’: client expectations in some cases were clearly considered reasonable and the problem was having the resources, tools and time to respond to them; for others, client expectations were unrealistic about what could be achieved, and what was valid to do from a research point of view.

One ‘unreasonable’ expectation mentioned several times was that clients were unwilling to pay for this work, or expected it for free. Cost was also mentioned as a challenge, independently, but it came well down in the list of concerns.

Among the infrequently cited mentions were several that are interesting from a technical point of view, but may not be uppermost in those who are less directly involved with the technology, including the difficulties of handling research data through general-purpose graphics tools, the challenges of integrating software and interfaces to provide an integrated and error-free process, and specifically, how to create solutions which are both generic, allowing for scale, but then allow for a high degree of individual tailoring.

6.4.1 Example comments

“Not automated enough. Too much time in making a chart "understand" what market research wants to see. It would be incredible to have a dashboard/mobile solution that understood you wanted to analyze the data instead of putting 1s and 2s in a chart. So much time is spent on reworking the data so the existing dashboard programs can report what you’d think should be standard. Filtering the same chart with user input is an example of how something so easy can become so difficult.”

“Staff who understand what effective visualization is. People who can distinguish between usability and ‘chart junk’.”

“Microsoft Office limitation as a general rule and user capacity. There are many powerful tools for data visualization reserved for an informed public.”

“Visualising complex relationships on a few charts.”

“It is difficult to satisfy the needs of many clients at once with one custom-built tool, since each client has individual wants and needs for data visualization. Developing the software takes considerable resources and the laundry list of client wants/needs never gets shorter.”
“Different clients want to see different formats. Also, the software tools (e.g., PowerPoint) are terrible - lots of bugs requiring lots of workarounds. And PowerPoint totally breaks down for power users. We would love to switch to another software but PPT is the ‘standard’ that clients expect and request.”

Takes entirely too much time. Our clients have been pressing us to go faster for so long that introducing an idea that will add time seems unacceptable. Data visualization takes thought and creativity, which are both time intensive.

6.5 Conclusions

Not all clients necessarily want, or are willing to pay for more advanced visual modelling or presentation of findings, but many are seeking this as a way to make research findings more accessible to a wider audience, or simply to improve the quality of presentation which the repetitive PowerPoint slideshow has rendered dull and unimaginative.

Yet most research companies appear unwilling to consider tools that go beyond the limited and somewhat pedestrian capabilities of Excel and PowerPoint – often citing reasons of compatibility or client demand. The same clearly does not apply to specialised tools used elsewhere (for example, web surveys are not fielded using Excel forms), and we believe that practitioners are confusing creation with distribution, where universal accessibility is a necessity.

Apart from not having the right tools available, many research companies reveal that they do not possess the requisite skills, and there appears to be a high level of self-awareness in this area. Researchers and research assistants predominate in the creation of graphics and visualizations – specialists with expertise in the visual presentation of data or with visual design skills are referred to by a minority of companies, and are probably involved on a small minority of projects overall.

There also appears to be low awareness, and low levels of trust in using alternative software to present data visually, even though it is acknowledged that Microsoft Office tools are inadequate in the support they provide for research data or for common demands, such as for publishing data online. Using the wrong tools is massively wasteful of time and resource, and therefore costly.

Combine a lack of effective tools with a lack of skills and creativity demanded by this area, and a large section of the research industry is in danger of failing to keep up with what rival providers of information and insight are doing every day. Many industries, from media and publishing, to data aggregators, consulting companies and even corporate intranets are using business intelligence tools to distil information from their own data warehouses.
7 Sample Sources

7.1 Sources used

In one of a series of questions asked each year, we asked

**Which sources of online sample do you use?**

![Graph showing sources of online sample from 2004 to 2011](image)

- The proportion of companies using sample from the client and access panels is gradually increasing.
- However, the use of sample from specialist sample providers and own panels has remained fairly static over the years.
- Sample sources varies by company size: due to the investment required, it is not surprising to see that more large companies than small companies source sample from their own panels.
- Furthermore, large companies are less likely than others to use sample from the client or access panels, no doubt because there is a greater opportunity for large companies to use their own panels.
7.2 Online 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).

7.2.1 Trend since 2006

(There are no data for 2007 because this question was not asked in that year.)
The revenues derived from access panels has increased slightly since 2006, mainly at the expense of own panels.

The four main sources of online sample account for 97-98% of online survey work, a share that has been consistent across all five years observed.

### 7.2.2 Current year

<table>
<thead>
<tr>
<th>Region</th>
<th>Own panels</th>
<th>Third party/access panels</th>
<th>Specialist sample providers</th>
<th>Sample provided by client</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pac</td>
<td>30%</td>
<td>26%</td>
<td>10%</td>
<td>29%</td>
<td>5%</td>
</tr>
<tr>
<td>Europe</td>
<td>29%</td>
<td>31%</td>
<td>9%</td>
<td>28%</td>
<td>2%</td>
</tr>
<tr>
<td>North America</td>
<td>16%</td>
<td>46%</td>
<td>10%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>25%</td>
<td>36%</td>
<td>10%</td>
<td>28%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Figure 44 Sample source volumes (revenue) for the current year by region

- The picture varies slightly by region, with North America making far less use of own panels and far more use of access panels.
- Apart from the variation noted above, usage by region is very similar.
- By company size, large companies make far more use of their own panels and far less use of sample provided by the client.
- Again, differences by company size are confined to the variation in large companies’ use of own panel and client sample – beyond that, usage patterns are highly consistent. We detect no regional variation in the use of access panels, in particular.

Figure 45 Sample source volumes (revenue) for the current year by company size
Mixed modes

We have asked about the industry’s demands and use of mixed mode research since the third year of the survey, in 2006.

8.1 Integrated or separate platforms

We asked:

_Do you use an integrated software platform for your multimode interviewing, or do you need to switch between different software platforms to combine modes?_

![Figure 46 Mixed-mode research, proportion of usage of integrated platforms vs. switching between different platforms](image)

- There has been a gradual but marked trend towards integrated platforms and away from switching between different platforms. As it is a major upheaval for most companies to switch survey software platforms, any measured change is likely to be gradual.
- The use of integrated platforms has risen from 38% of those conducting multimode interviewing in 2006 to 60% in 2011, and has been consistently in the majority since 2009.

8.2 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 tools ability to mix and combine different data collection modes?

**Figure 47 The importance of multimode data collection**

- The industry clearly has a requirement to conduct multimode interviewing, with most companies saying that it is important that a software product can do this.
- Overall, there is has been little change in demand since this question was first asked in 2008.
8.3 Level of mixed mode required

(There are no data for 2009)

- Overall the shares are relatively consistent, with a minority requiring the most complex level of support – multi-mode with switching.

- The fluctuations between common authoring (the simplest level of multi-modal alignment in survey software) and mixed modes in parallel (i.e. extending the support to data collection too) are hard to explain by any trends within the research environment, so perhaps denote the extent to which there is disagreement among still individual researchers and practitioners, about the need for mixed mode data collection, and this variation is expressed in the differences between the participants selected and responding each year.
9 Analysis and results reporting

9.1 Distribution methods

Q: “What percentage of projects currently involves the following deliverables or distribution methods to the client?”

![Distribution Methods Graph]

- Microsoft PowerPoint is dominant and even in a dominant position at the start, still appears to be drifting upwards in popularity.
- Microsoft Word, Acrobat PDF files and printed tabs all look to be gradually losing ground.
- Microsoft Excel seems to have made a large leap forward in 2011. It is too early to tell if this is a new trend or a random spike in the data, but we suspect the latter is the case.
- Interactive analysis does not appear to be gaining much traction.
- The use of digital dashboards may be drifting slightly upwards, but it too early to tell: we have only offered this as an option since 2009. However, elsewhere, participants are predicting that demand for dashboards will rise (see section 9.3)
- Overall, provision of static reports online appears relatively stable, despite some year-on-year fluctuations.
The larger the company, the greater the use is made of Microsoft PowerPoint. Large companies make significantly more use of digital dashboards than medium or small companies.

The relative order of importance for the different methods is very similar between global regions. Overall, more reporting methods are cited by companies in North America. The average number of mentioned methods overall is 1.61 but in North America this is 1.82; 1.50 in Europe and 1.36 for Asia Pacific. There was virtually no difference reported by company size.

9.2 How important are conventional cross tabs?

Since 2004, we have asked each year:
When considering analysis and reporting tools for the future, how important is it that these should be able to produce volumes of cross-tabular reports?

Figure 52 The importance of conventional cross tabs 2004-11

- It is remarkable how little this chart has changed since 2004. In 2011, 85% of participants think that printed cross tabs are important and in 2004 it was 86%. The printed tab is clearly still here to stay!
- Equally consistent is the 14-20% of research and technology practitioners who see the bulk cross-tab report having little or no relevance.

9.3 Future demand

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 (e.g. Sharepoint)**
5. **Digital dashboards (dials or traffic light-style reporting) for high-level scores or KPIs**
Figure 53 Changes in demand for new ways of delivering results – overview

- Companies anticipate a modest increase in demand for all the newer technology-based ways of delivering results.
- Despite the growth predictions for interactive or online analysis, there has been no sign of this growth so far. In an earlier question, this delivery method seems to be fairly stable or even slightly declining. (see section 9.1)
- The larger the company, the more optimistic they are about the growth potential for new technology-based reporting methods. Large companies are particularly optimistic about digital dashboards.

Table 8 Predicted demand for various newer methods of delivering results

<table>
<thead>
<tr>
<th>Method</th>
<th>Total</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed reports online</td>
<td>74 %</td>
<td>68 %</td>
<td>83 %</td>
<td>79 %</td>
</tr>
<tr>
<td>Inter-active tabs/chart creation</td>
<td>64 %</td>
<td>55 %</td>
<td>66 %</td>
<td>81 %</td>
</tr>
<tr>
<td>Integrated research portals</td>
<td>71 %</td>
<td>63 %</td>
<td>76 %</td>
<td>83 %</td>
</tr>
<tr>
<td>Delivery to external portals e.g. Sharepoint</td>
<td>64 %</td>
<td>53 %</td>
<td>72 %</td>
<td>79 %</td>
</tr>
<tr>
<td>Digital dashboards</td>
<td>70 %</td>
<td>61 %</td>
<td>74 %</td>
<td>91 %</td>
</tr>
</tbody>
</table>

Table 9 Future demand predictions for all electronic delivery formats: all reporting any net increase shown by company size

![Bar chart showing changes in demand for new ways of delivering results](chart.png)
9.4 Variations in analysis and reporting practice

Over the years, there appears to be a slight shift towards in-house data processing departments creating reports (if considering the value reported in 2010 as atypical).

In 2011, the share of research reporting done by researchers creating reports using desktop tools has gone down – the opposite of what might be expected. It is too early to tell whether this is a new trend or, as we suspect, a random fluctuation in the data.

Overall, research companies seem to split between around a quarter to a third where researchers largely produce their own analysis, over one half to two-thirds where the work is delegated to DP specialists either in house or externally to accomplish the task.

Figure 54 Analysis and reporting practices, 2007-2011
10.1 Plans to change software

As we have every year since the survey stated in 2006, we asked companies whether they had plans to change the software they were using for MR in the next one to two years.

The proportion of companies who say that they are changing their software changes every year. We consider this question provides a general indicator of confidence within the industry, and indeed no overall year-on-year trend can be perceived.

Due to the general economic climate since 2009, we were not surprised that the proportion of companies who intend to keep their existing software (ie those who answered ‘no’) was higher than normal in 2010. However, we are surprised that this is not also the case in 2011. Perhaps this indicates that companies are now looking forward, and are seeing the potential to increase their efficiency and profitability by investing in more modern technology.

In fact, in 2011, an unusually large proportion of companies say they plan to change their software. This appears to provide an opportunity for some software developers!
Figure 56 Plans to change software in the next one to two years, by region

- It appears that a lot of market research software is about to be replaced in Asia Pacific. It is noticeable that less than a quarter of companies (23%) say they are keeping their existing software over the next one to two years and two-thirds (67%) plan to buy new technology.

- Large companies seem to be the least likely to be planning to buy new software, with 43% saying that they are keeping their existing tools.

Figure 57 Plans to change software in the next one to two years, by company size
10.2 Types of software to be changed

We asked those who said they had plans to change their software, which types of software they were going to change.

- It is clear that many companies want to change more than one type of software, since all software types except panel management have received high scores.

- Small companies seem to have slightly less ambitious plans for investing in new software than other companies, since the score for most software types are lower. However, this is not surprising because small companies are likely to have fewer types of software.

- It is noticeable that small and medium companies are more likely to be looking for panel management software than large companies. Maybe many large companies have recently acquired new panel management software?

- Looking at the regional differences, it is clear that companies in Asia Pacific want to change more types of software than those elsewhere. In fact, it seems that most Asia Pacific companies who are looking for new software want to change their data collection and data analysis software, and many want to change other types of software too.
10.3 Reasons for changing software

We asked:

*What are your reasons for considering a change in the software used?*

and allow participants to select any number of reasons from a list provided.
Our participants cite mainly reasons to do with the capabilities or performance of their software as their reasons for changing it. Reasons such as cost and concerns with suppliers are less of an issue.

‘Consolidate to a single platform’ is second on the list, when looking only at the main reason (see below). ‘Move to a more modern platform’ also scores highly. This suggests that there are many companies using outmoded tools that do not integrate well with some of their more modern technologies. It also supports the finding in section 8.1, showing that there is a clear trend towards the use of integrated platforms for multimode interviewing.

Efficiency improvements are high on the list when looking at all the reasons the participants state but fairly low, when considering their main reason.
Analysis of sample

11.1 Total respondents

In 2011, 230 senior managers from market research companies in North America, Europe and Asia Pacific completed this survey. This increase from 213 in 2010 is due to a greater volume of sample.

11.2 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.

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Total</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>114</td>
<td>42%</td>
<td>62%</td>
<td>31%</td>
</tr>
<tr>
<td>Europe</td>
<td>74</td>
<td>39%</td>
<td>25%</td>
<td>36%</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>42</td>
<td>19%</td>
<td>12%</td>
<td>33%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>230</strong></td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Table 10 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.

11.2.1 Countries Covered

36 countries are represented in the 2011 survey and are as listed below. This is six more than in 2010.

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\(^3\). 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 and New Zealand, China, Spain and Italy.

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Inevitably, in some cases we achieved or exceeded our targets; and in others we fell short, especially in France, Japan, China and southern Europe. Although the regions were still extremely well balanced because we had good response rates in most other Asian and European marketplaces.

The survey was translated into French, German and Japanese. We are aware that we would have reached a larger sub-sample in South and East Asia, if we had translated the survey into other languages. However this would have meant translating the survey into several other languages, which was not viable on account of the cost.

<table>
<thead>
<tr>
<th>Country</th>
<th>Number</th>
<th>Response Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>65</td>
<td>28%</td>
</tr>
<tr>
<td>UK</td>
<td>40</td>
<td>17%</td>
</tr>
<tr>
<td>Germany</td>
<td>23</td>
<td>10%</td>
</tr>
<tr>
<td>Canada</td>
<td>20</td>
<td>9%</td>
</tr>
<tr>
<td>Australia</td>
<td>10</td>
<td>4%</td>
</tr>
<tr>
<td>India</td>
<td>8</td>
<td>3%</td>
</tr>
<tr>
<td>France</td>
<td>6</td>
<td>3%</td>
</tr>
<tr>
<td>Japan</td>
<td>6</td>
<td>3%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>4</td>
<td>2%</td>
</tr>
<tr>
<td>Spain</td>
<td>4</td>
<td>2%</td>
</tr>
<tr>
<td>China</td>
<td>3</td>
<td>1%</td>
</tr>
<tr>
<td>Ireland</td>
<td>3</td>
<td>1%</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>3</td>
<td>1%</td>
</tr>
<tr>
<td>Hungary</td>
<td>3</td>
<td>1%</td>
</tr>
<tr>
<td>Sweden</td>
<td>3</td>
<td>1%</td>
</tr>
<tr>
<td>Austria</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Belgium</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Denmark</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Estonia</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Iceland</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Greece</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>Finland</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>Italy</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>Lithuania</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>Korea</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>Pakistan</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>Romania</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>Russia</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>Singapore</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>Thailand</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td>Andorra</td>
<td>1</td>
<td>0%</td>
</tr>
</tbody>
</table>

**Table 11 Respondents by country**

### 11.3 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 nearly three-quarters (73%) of the sample were either at board level or were primary decision makers for software and technology issues:
We were also concerned to ensure that the survey was not taken purely by technical staff (IT or DP) but incorporated views from those with research and business/operational responsibility and expertise too. With just over a quarter (26%) of the sample considering themselves to be technical specialists, we do not consider the survey is biased towards a technocentric view; 38% had research responsibilities and 36% 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.