

A note on this PDF

This PDF can be used in two ways. If you read it on a screen you will be able to take advantage of its navigation features. If you prefer to print it out, please note that the page size is designed to allow you to print two full-size pages per sheet of A4 paper (in Windows, go to *Print > Properties > Layout > Combination > 2 in 1*).

The navigation

In order to ensure we have provided an appropriate overview – this guide is, by default, very detailed and so we assume it will be digested in sections rather than in its entirety. We have, therefore, provided a very clear navigation so that this is possible.

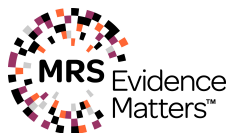
The Contents pages contains underlined links to the related pages of the Guide. At the foot of each page you will find a set of links to the rest of the chapters. In addition there are links within the pages to other relevant sections elsewhere in the Guide as well as to useful websites and email contacts.

A guide to understanding and working with market research agencies & consultancies

The Voice
of British
Advertisers



An ISBA Guide
Endorsed by MRS



Contents

Introduction	4
About ISBA	6
1 Market research: An overview	
<i>a</i> What is research?	8
<i>b</i> Research as a business tool	8
<i>c</i> Questions to ask at the beginning of the business plan cycle	9
<i>d</i> So what kind of information can research provide?	9
<i>e</i> The difference between quantitative and qualitative research	11
<i>f</i> Quantitative research	11
<i>g</i> Qualitative research	12
<i>h</i> The main qualitative and quantitative techniques	13
<i>i</i> The structure of specialisms	14
<i>j</i> The basics of fieldwork	15
2 The UK market research sector – at a glance	
<i>a</i> Major agencies and consultancies: Who owns what and sourcing agency details	22
<i>b</i> MRS and its role (including the <i>MRS Code of Conduct</i>)	24
<i>c</i> ISOs for research	27
<i>d</i> Other market research bodies	28
3 Market research agency structures	
<i>a</i> Typical organigrams	33
<i>b</i> Typical role definitions	34
<i>c</i> Typical team structures and roles	35
<i>d</i> Managing budgets and costs	36
<i>e</i> Identifying key needs: The difference between data gathering and insight	37
4 Ensuring quality	
<i>a</i> Five principal considerations	40
<i>b</i> Ensuring a quality output and a competitive price	42
<i>c</i> Ensuring quality is maintained	44
<i>d</i> Guidance on basic briefing principles	46

5 Costings

- a* How costs are built 50
- b* In-house v third-party costs 51
- c* Guidelines on balance of costs 51
- d* Underlying changes in the research industry and their effect on costs 52

6 Typical terms of business and remuneration models

- a* Typical terms of business:
what's generally included and what can be included 56
- b* Typical remuneration models – and how they're changing 58
- c* Syndicated research: The differences in terms of business 60

7 Service level agreements

- a* Building a service level agreement 62
- b* ISBA's marketing industry guidelines 63

8 Evaluating an agency or consultancy

- a* Evaluating the agency's performance 68
- b* Management involvement 68
- c* The team's performance 68
- d* Responsiveness and timeliness 68
- e* Meeting key targets 69
- f* Adding business value 70

9 Timings and scope of work

- a* The reality of timing plans 72
- b* What influences timings? 73
- c* Keeping to plan: The role of the advertiser v the role of the agency 74
- d* What should be included in a research scope-of-work document? 74

Glossary

77

Introduction

Nearly three years ago, ISBA's Consultancy team noted a distinct increase in requests from our member procurement community for any information relating to the procurement of market research services and the management of research agencies. The ISBA Market Research & Insight Group was created as a result to provide members with a forum to get together, share best practice and discuss the issues they were facing in procuring research services. Some key trends and issues quickly became clear:

- A rapid growth of marcomms procurement involvement in market research services management
- A series of fundamental shifts in how the market research industry works; shifts driven as much by technological advancements as anything else
- An appreciation that many of the marcomms procurement professionals now charged with managing MR agency rosters, had little knowledge of, or experience in, the market research world; and therefore had a real thirst for knowledge in this area

These drivers led us to commission Brian Jacobs & Associates to conduct a qualitative research study among key members of the client marcomms procurement community and their research and insight colleagues. This study was subsequently widened to include the views of executives from a cross-section of market research agencies. It is not the purpose of this Guide to reveal the full findings of this research,* but the results highlighted the need for some industry guidance to help enhance understanding of market research and help them adopt best-practice principles while procuring research services and managing agencies.

Following the insights revealed, we were delighted that Brian Jacobs and Louise Cretton from BJ&A agreed to author a best-practice guide for us. We are immensely grateful for all their hard work producing the content for the Guide.

This is not intended to be a definitive user's guide to market research – there are many such guides available, in particular from the Market Research Society (MRS). Our aim has been to produce a practical guide for the benefit of those (particularly in procurement) who wish to:

- gain a better understanding of the market research agency world in order to engage with and be of value to their internal market research and insight colleagues
- learn how best to manage their external agency partners

That said, we also hope that this Guide will prove valuable to the market research community, who in many cases are not particularly familiar with the requirements of procurement departments. We are thankful we were able to enlist the help of MRS and achieve endorsement for this Guide as a joint industry initiative (many thanks in particular to Debrah Harding for her help and input).

One of the main conclusions drawn from the research mentioned above was that the industry has shifted from a two-partner model, where market research professionals client-side dealt directly with market research suppliers (agencies or consultants), to a new, tripartite model where MR agencies work closely with both commercial/procurement and insight teams at the advertiser. We hope that this Guide will help all sides in this new model to understand one another better and to work more effectively together in the future.

Finally, we would like to thank the Chair of the ISBA Market Research & Insight Group, Geir Tveraaen of Unilever, for all his help and support throughout the production of this Guide.

If you would like to know more about the research mentioned above, or are interested in joining the ISBA Market Research & Insight Group, please contact Traci Dunne, Consultancy Executive at ISBA. Her email address is TRACID@ISBA.ORG.UK.

Note. For simplicity's sake, throughout this Guide we have used the word *agency* to include consultants or any suppliers of market research.

Useful contacts

ISBA

Email: tracid@isba.org.uk

- www.isba.org.uk

MRS

- www.mrs.org.uk
- www.research-live.com
- www.theresearchbuyersguide.com

Brian Jacobs & Associates

- www.bjanda.com

* Copies are available to ISBA members on request – email tracid@isba.org.uk

About ISBA

ISBA is the Voice of British Advertisers. It is the only body focused single-mindedly on protecting, and leveraging, the collective interests of Britain's advertisers across their marketing communications. We have over 400 member companies and represent in excess of £10billion of spend on marketing communications.

ISBA seeks to head off moves by government, regulators and NGOs to place what it sees as unwarranted restrictions on the freedom to advertise responsibly. ISBA leverages the collective position of UK advertisers in their agency and media owner relationships – driving tangible, hard savings. We provide a diverse range of consultancy services, guidance, training and best practice (such as the production of this Guide) to enable our members to extract maximum value from their marketing spend, their ISBA membership and to build internal capability. ISBA also provides a range of opportunities for members to share experiences and expertise, receive early warning of industry developments and contribute to ISBA policy.

“Being a member of ISBA is a fantastic way to become connected to a community of experts passionate about marketing effectiveness and best practice. They operate a real ‘centre of excellence’ approach across key disciplines and help to champion the cause of the industry with rigour and passion”

Pete Markey, Marketing Director, MORE TH>N – ISBA member

To find out more about ISBA please visit www.isba.org.uk or contact the membership team on 020 7291 9020.

1

Market research: An overview

<i>a</i> What is research?	<u>8</u>
<i>b</i> Research as a business tool	<u>8</u>
<i>c</i> Questions to ask at the beginning of the business plan cycle	<u>9</u>
<i>d</i> So what kind of information can research provide?	<u>9</u>
<i>e</i> Difference between quantitative and qualitative research	<u>11</u>
<i>f</i> Quantitative research	<u>11</u>
<i>g</i> Qualitative research	<u>12</u>
<i>h</i> The main qualitative and quantitative techniques	<u>13</u>
<i>i</i> The structure of specialisms	<u>14</u>
<i>j</i> The basics of fieldwork	<u>15</u>

a What is research?

Market research is the collection and analysis of information about markets, organisations and people to support better business decisions. In today's competitive business environment, the more knowledge a business has about its customers, the more likely it is to succeed.

Research is based on the principle that a relatively small sample of people can provide accurate opinion and weight on any given subject or issue that is representative of a much larger population or community. This data can then be applied to gauge public opinion and offer greater insight to perceived attitudes. Research can operate as a means of communication between organisations and their stakeholders, whether they are consumers, other businesses or government.

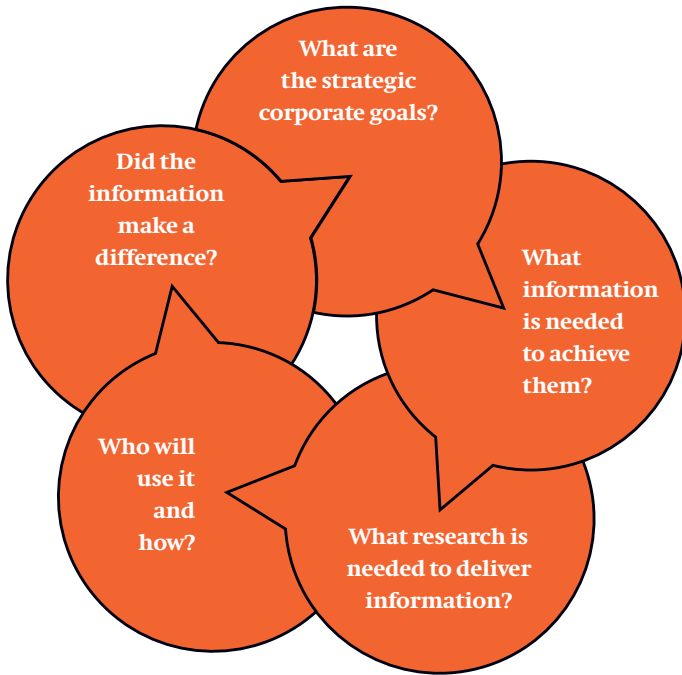
Research that is properly structured can be used to deliver information that can provide insight into a target audience.

b Research as a business tool

The main thing to remember is the importance of commissioning research designed so that it is fit for purpose – that is, it will do the job it is needed to do. Some jobs are big and strategic and some smaller and tactical. You need to know which you are commissioning, because from that will flow your research design, budget, time allocation etc.

Research is available as a tool to help a company/service/government make better, more informed decisions. The more research is embedded in the strategic plans of a company, the more it can be planned and used appropriately.

c Questions to ask at the beginning of the business plan cycle



Ideally at the business plans stage, research needs should be identified, budgeted and planned. This helps to avoid the pitfalls of short-termism. It smoothes the process of buy-in across an organisation and creates a culture of learning and evaluating that keeps a company fresh.

d So what kind of information can research provide?

Here are some applications for research:

behavioural: how do consumers behave: what do they do and why?

attitudinal: research can enable organisations to assess a range of perceptions and opinions relating to customer satisfaction and preference in the provision of services and products

product development: research can identify new trends and changing habits, and help a business stay ahead of its target market, as well as testing new products and strategies before they are launched

policy development, implementation and evaluation: in the complex process of policy development, research can provide effective evaluation at every stage

public consultation: research can help acclimatise government thinking with public opinion

communications: research can enable two-way dialogue with key stakeholders and inform the selection of effective channels of communication

public relations: research can help companies understand the behaviour and attitudes of target audiences, helping them with successful media positioning and branding

market measurement: identifying the sizes, composition and profile of different markets (market segmentation) and tracking changes and trends over time.

This is not an exhaustive list by any means. It is possible to find out about most aspects of any market via research.

With technology and the proliferation of media, there are many new techniques out there; keeping abreast of innovation is a challenge to anyone buying or commissioning market research today.

Some of these new techniques can be cheaper with results delivered faster than in the past. Of course, 'cheaper' and 'faster' does not automatically mean that the research will deliver to your specific goals and objectives; there are also broader issues such as sample representativeness that should be considered before electing to use some of these new techniques. At the same time, sticking to the older, more traditional techniques purely for historic or data consistency reasons may not be the best approach in the technologically driven world in which we live. A good research agency would be able to advise on the impact of changing methodologies and suggest how this might be addressed along with any resulting 'breaks' in longitudinal/historic tracking data. Any change in methodology must be to one suitable for the job in hand.

Those commissioning research want to achieve a real, reliable response, leading to positive actions that impact the business. It is worth considering all available methods of collecting the information you need to inform your decisions.

It must be remembered that effective market research is much more than a collection of different research studies and techniques – in order to achieve the best results, market research needs to be embedded within the culture of any organisation.

e The difference between quantitative and qualitative research

A research project should be defined by the business challenge that it aims to address. Problem definition can be one of the most difficult things to identify, and this is one area where a good research agency can assist through the research proposal process. To address a business challenge, research agencies will produce a research programme that will include a range of techniques for gathering information.

Research techniques generally fall into two types: quantitative or qualitative. A good research agency will help their client devise the right mix of quantitative and/or qualitative techniques to address the identified business problem. Therefore it is beneficial for clients to understand the difference between these techniques.

f Quantitative research

- Quantitative research concerns itself with collecting large numbers of data points or interviewing large numbers of people.
- It produces results that bear statistical analysis; generates meaningful percentages; results can be evaluated by significance tests.
- It is difficult to say exactly what constitutes a quantitative study sample. Often a quantitative study is in the 1000s. A statistician or a good quantitative researcher will advise on sample sizes. A key issue is the degree to which you need to identify statistically meaningful differences between sub-groups in the overall sample. For example, a well constructed national UK sample of 1,000 will provide opinions of the population as a whole, but the sample may need to be increased or weighted to provide comparisons by age, region of residence etc.
- Quantitative research is used to achieve definitive, reliable measures and make valid, reliable comparisons between products (x% prefer this, y% prefer that).

One way of thinking about quantitative research is that it is more about numbers and statistics, and less about the consumer's emotional connection with the topic.

Often organisations will choose quantitative research when they want confidence that the results are representative in order to support a business decision, measure performance or provide quotes to the press.

Methods

Quantitative studies can be carried out face to face, by post, by phone, online, etc. It is important to remember that the cost will vary depending on the methods used. Face-to-face interviews can be very expensive but produce high-quality results, mainly because an interviewer physically interviews a respondent. There is a cost for his or her time. The trick is to know when it is important to make that investment in that particular methodology versus the more hit and miss self-completion approach of other methods, where the sample may be more difficult to control and the answers less complete.

Difference in quality of sample

The quality of the sample is vital. Ideally you want a representative sample of the population you are interested in, to enable the results from the research to be accurately extrapolated. Always ask about the quality of the sample from a market research agency and seek explanation and justification. Sometimes it is acceptable and cheaper to have a less controlled sample – it depends on the purpose to which the results will be put.

Key questions

- Sample size
- Methodology
- Quality of sample

g Qualitative research

- Qualitative research concerns itself with collecting a range of views from individuals or small groups of people through an in-depth discussion of the topic being investigated.
- Importantly, qualitative research is not statistically capable of analysis. It produces viewpoints not percentages.
- It is used to find out about attitudes, feelings, motivations, complex decision-making paths, differences.

Analysis is interpretive, subjective, impressionistic and diagnostic.

One way of thinking about qualitative research is that it is more about achieving an understanding of the consumer's emotional connection with the topic, or exploring how decisions are made, and less about numbers and statistics.

The skill is to design a research study that enables the collection of a range of views from the right sort of people at the points where they

are most capable of giving honest answers.

Quantitative and qualitative methods can be applied in the same project in a complementary fashion. Sometimes qualitative precedes and feeds into the design of a larger quantitative main study, sometimes vice versa.

Often organisations commission qualitative research to aid understanding, broaden their minds and judgement. In itself it is not definitive, but can add a richness of understanding to underpin subtle marketing areas, such as

- understanding target audience
- nuances of communication strategies
- identifying consumer needs
- new product development, by taking into account the complexity of those emotional dimensions that drive human behaviour

***h* The main qualitative and quantitative techniques**

There are a large number of techniques or types of study for both qualitative and quantitative research. Those listed below are not exhaustive; the important judgement you have to make is whether the technique or type of research is appropriate. Will it give you what you need to know, address the business problem identified and provide the degree of confidence in the results you need to have to make the decision you need to make?

Quantitative techniques

Survey

Tracking

Evaluation study

Syndicated study

Qualitative techniques

Focus groups/group discussions

In-depth interviews

(one-to-one, paired depths etc)

Ethnography

Accompanied shops/journeys

For definitions see the Glossary on pages 77–80

NB. Different research agencies and consultancies may use different names for their methods. You should evaluate their definitions of that method and its appropriateness for the objectives of the project you are commissioning.

Methods and styles of research have been revolutionised by technology, especially the growth in internet access; it's important to be aware of innovation in this area.

Quality can be achieved with these new methods; it is not necessarily the case that the more traditional methods and tools are the

best. Indeed, many new techniques and approaches, using as they do new communication techniques and technologies, can be as reliable as and provide an even richer source of consumer insight than some of the more established ways of conducting research.

i The structure of specialisms

The structure and evolution of the market research industry has elements in common with other marketing services business sectors. Just as the old full-service advertising agency model has been replaced by a set of interdependent specialist organisations, so has the all purpose market researcher been superseded by consultants and specialists, although there are still some one-stop-shop suppliers.

There is also an emerging trend within the research sector for agencies and consultancies to move away from being associated with specific research techniques, instead offering a much more holistic 'business partner' approach whereby the skills of the research agency will be utilised to address any business problem that has been identified irrespective of the specific techniques that will be used.

One of the most basic splits by specialism is by research technique – so there are many agencies specialising only in qualitative work. This work is by its nature focused on an individual's skills and abilities to elicit and interpret the opinions of respondents, be that via a focus group or a depth interview (or any other qualitative technique). It therefore attracts small operations – qualitative agencies are often made up of a few like-minded specialists.

Quantitative agencies tend to undertake larger-scale, structured quantitative projects such as surveys, with fieldwork carried out either online or by interviewers (using face-to-face and telephone techniques), producing data that needs to be checked and analysed.

Within this basic split natural specialisms have evolved. For example, a qualitative researcher might well have a particular expertise in a specific market sector – they might, for instance, know a great deal about mobile phone tariffs and be thus of particular value to mobile phone operators wanting to assess how certain target groups react to certain price structures.

Or a quantitative agency might have developed a particular expertise in interviewing C-suite executives or health care professionals. Much time can be saved by commissioning work from those with some experience and understanding of the sector under investigation – and as such it's always a good idea to satisfy yourself that an agency is truly a 'specialist' in your field, maybe by seeking references from

those who have used them before, or by simply speaking to them yourself.

Over time, the extent of specialisation has grown particularly in the area of data collection. There are now agencies that focus on fieldwork, others on managing panels of consumers, still others on data tabulation and analysis. There are online research specialists – and others who focus on face-to-face or telephone interviewing. Then there are the so-called full-service agencies and consultancies – the one-stop shops that offer all services under the one roof.

There are pros and cons on all sides. Those supporting the multiple specialist approach will argue that this is the only way to have access to the greatest experts working on a business problem; the full-service agencies and consultancies will explain that they save time, and are more efficient as a result of the integration of the various elements that go to make up the overall assignment.

The growth in specialists has led to a culture of subcontracting of certain elements within an overall research programme. Often full-service agencies and consultancies will subcontract internally – to a specialist department or subsidiary companies.

One consequence of this structure of specialism is that subcontracted costs need to be carefully assessed. Agencies and consultancies should be asked to explain how the overall cost of a job breaks down – and (if external subcontracting is used) attention needs to be paid to ensuring that excessive (third party) margins are not added at every stage of the process.

This cost issue is addressed further in *Costings* on [PAGE 50](#).

MRS publishes the *Research Buyer's Guide*, which lists MRS members' and MRS Company Partners' particular areas of expertise, the specific areas they cover and the market sectors in which they have experience.

j The basics of fieldwork

Fieldwork is at the heart of every research project. Defined by MRS as 'the live collection of primary data from external sources by means of surveys, observation and experiment', the term is used to cover all aspects of quantitative and qualitative research.

There are many different ways of collecting data and information from consumers, some of which have been mentioned above. The major *quantitative* methods with their advantages and possible disadvantages are as follows.

Face-to-face interviews

As the name suggests, an interview conducted by a trained interviewer with a respondent. The old image of a market research interviewer with a clipboard approaching a passer-by is an example of a face-to-face interview; but there are variations. The interview could take place in the respondent's home, in a venue hired for the purpose, in a public place such as an airport, or in the respondent's workplace. And it's more likely to be conducted with a laptop or other electronic device as opposed to a clipboard.

Face-to-face interviews are expensive when compared with the key alternatives (online or telephone interviews) and they are often short (unless set up in advance to be otherwise). Something to be aware of is that they can also be affected by unwitting interviewer bias – the interviewer can sometimes misunderstand or misinterpret the questionnaire instructions, although interviewers are trained and briefed carefully.

This type of questioning allows the researcher to come into direct contact with the respondent, reducing any chance of mistaken identity.

Online interviews

Conducted via an online questionnaire sent to respondents and completed by them in their own time. Similarly qualitative interviews can also be conducted online. Online fieldwork is cheaper than face-to-face; generally easier to organise; can produce faster results (because the answers are input directly) and is becoming increasingly popular.

The respondent answers questions in a relaxed atmosphere, and at his or her own pace. It's easy to include prompts, such as short pieces of film or creative material.

Despite quality checks carried out by research agencies, there is sometimes a concern that respondents may not always be who they say they are, or that respondents answer questions in a pattern ('straight-lining'). Some people may not have access to up-to-date technology. Also, the interview may be very divorced from the context of the topic being researched.

A large proportion of online quantitative research is based on samples drawn from self-selected 'access panels', which may not necessarily provide a sample representative of the target population for the project. ESOMAR has produced a guide to assist clients in this area, *26 Questions to Help Research Buyers of Online Samples* (see www.esomar.org).

Although the majority of the UK population has access to the internet there are certain categories or demographics that will be exclud-

ed from this form of fieldwork. Internationally, access to technology in this way is still highly variable.

Self-completion questionnaires

Similar to online interviews, except that the respondent completes a hard copy of the questionnaire and returns it in the mail.

As with online, respondents complete the questionnaire in their own time, and in a relaxed environment. And many of the same pros and cons apply – including a limited ability to check that the desired respondent is in fact the person completing the questionnaire. Respondents have the opportunity to read the full questionnaire before answering it.

Because the responses are not being entered directly by the respondent, there is a cost implication implicit in entering responses from paper copies into an analysis system.

Telephone interviews

Conducted by an interviewer over the telephone. Telephone interviewing combines the benefits of an in-home interview with the savings associated with not having interviewers physically visiting the homes of respondents. Further, because interviews can be recorded, quality control can be conducted during the data collection as opposed to afterwards.

However, the telephone is seen by many as a personal device, and thus any activity (be it a sales call or a quite legitimate research interview) is sometimes seen as an invasion of privacy. Potential respondents increasingly have the opportunity to screen out calls from unfamiliar sources.

Plus, prompts and visual aids cannot be used (unless prior arrangements have been made to combine straightforward telephone interviewing with another technique), and there is no opportunity to carry out a visual check that the respondent fits the demographic description desired for a balanced sample to be achieved.

Traditionally, telephone-based research has used fixed landline numbers, but increasingly methods are being developed to conduct research via mobile devices using any combination of telephone, SMS and online access.

Multi-mode

Increasingly, combinations of methods are being used to ensure samples are representative. For example, an initial telephone interview

may be used to recruit respondents who are then asked to access and complete a web-based questionnaire.

Qualitative research involves less structured questionnaires, and more freeform discussion around a brand, topic or issue. Typically, a questionnaire is replaced by a 'discussion guide'; this will include the key areas the interviewer or moderator will be covering during the course of the research.

Focus groups (also known as group discussions)

In these, a small group of (typically) six or eight respondents hold a discussion around a particular topic of relevance to the client. The group is led by a professional moderator, who guides the discussion in order to ensure that every pre-determined key element is covered in a natural and relaxed fashion.

Moderation is a skilful task. Respondents must not feel that they are being pressured or led in a certain direction. They must feel comfortable with the conversation and feel able to contribute.

Respondents are selected for inclusion by professional recruiters, working to a brief. It is essential that this brief is thorough, given that a focus group is by definition small and its success is going to depend upon selecting the most appropriate mix of individuals. Potential respondents are generally screened, via a short questionnaire, to ensure that they fit the criteria required.

It is not unusual to allow pairs to be included (sometimes having a suitable friend along can relax both respondents and can encourage them both to attend and to participate fully). Some focus groups are made up of 'friendship groups' or by recruiting further respondents via an initial contact ('snowballing'). In other cases the subject matter needs individuals not known to each other. Your selected specialist can advise you on the suitability of these and other elements that need to be carefully considered before the recruitment brief is issued.

Focus groups can last anything between one hour and all day. The standard length is around one and a half hours. The longer the group the more you pay for it – the moderator charges on a time-based rate, and respondents' incentives are time-related, as of course are room hire rates.

Sometimes groups are recorded; sometimes the client will watch proceedings through a two-way mirror. One benefit of recording groups is that the recordings can be turned into transcripts for the purposes of future analysis. Any recording of research or observation of the research process by clients can only be undertaken with the

express explicit consent of the respondents, who must be informed of the recording or observation at the time they are recruited.

Clients do sometimes ask to sit in on groups, but this always has to be at the discretion of the moderator, who judges if it will affect respondents in an adverse way. If clients do sit in they have to resist the inevitable desire to intervene, and they have to be quiet.

Focus group costs depend a lot on the specialist expertise of the moderator; whether the discussion is to be recorded; the ease (or otherwise) of recruiting respondents; the duration of the discussion; any moderator out-of-pocket expenses; the cost of hiring a venue; incentives to respondents to encourage participation; the provision of any refreshments, and so on.

The recognised method for evaluating costs in this area tends to be by the number of groups to be achieved for a given price. This is however less appropriate as the options within qualitative research expand and grow in relevance and value. One way of assessing the cost is to consider the size of the problem and the value to the business of solving it. A good researcher knows and can justify when it is appropriate to employ groups and when it is appropriate to use another method to meet the objectives. As with quantitative research, sometimes methods are used in combination.

Online methods are also available for conducting focus groups.

Depth interviews

Sometimes it might be considered inappropriate to discuss respondents' points of view in amongst a group. The subject area might be sensitive; or the respondents themselves might be more comfortable being interviewed one-on-one. This is true when interviewing CEOs for example or in sensitive topic areas such as personal health.

In these circumstances a depth interview might be conducted. In effect this is a similar process to a focus group: an unstructured conversation around certain pre-determined topic areas conducted by a skilled moderator.

Sometimes these depth interviews might be held with two respondents – couples, for example, or close relatives. Depth interviews can be conducted face to face, by telephone or online.

Other methodologies

Qualitative methods extend way beyond groups and depth interviews. Ethnography (the observation of how different groups behave under different circumstances) is becoming increasingly popular

particularly with the upsurge in online social media activity. Accompanied shops or journeys, where a researcher actually accompanies a respondent on (for example) a shopping trip, during which behaviour is observed and questions asked, are also used.

To reiterate, the important thing to remember with qualitative research is that it is not statistically robust. A qualitative sample seeks to achieve in-depth views from people. Indeed a range of views is helpful for informing the judgement of the client.

Clients regularly use the findings from qualitative research to inform a quantitative research study or to explain quantitative statistics. So the two methods can be used in combination. The skill is to know what to use, when – and how this will address an identified business problem.

A good research agency will understand the art of the appropriate and the possible in this area of research. You judge their recommendations and pay for their expertise.

2

The UK market research sector – at a glance

<i>a</i> Major agencies and consultancies	
Who owns what and sourcing agency details	22
<i>b</i> MRS and its role (including the <i>MRS Code of Conduct</i>)	24
<i>c</i> ISOs for research	27
<i>d</i> Other market research bodies	28

a Major agencies and consultancies:

Who owns what and sourcing agency details

The 2011 edition of MRS's *Research Buyer's Guide* has 399 pages dedicated to full-service research agencies; 95 pages to freelance consultants; 63 pages to fieldwork and tabulation services; 31 to data preparation and analysis specialists; and 31 to online research suppliers. All of which serves to make the point that there are a huge number of UK companies providing services that might be said to fall under the broad heading 'market research supplier'. Even if we limit ourselves to companies that provide a full market research service to advertisers, government, local authorities and so on, and exclude those who (for example) provide fieldwork services primarily to these mainstream market research suppliers, there are still many hundreds of organisations of every shape and size.

Of course, as with any industry, these suppliers vary considerably by size, resources and capability – differences that can be assessed by entries within the *Research Buyer's Guide* which generally quote turnover (within broad bands), staff numbers, services offered and specialisms.

The total UK market research industry is worth over £2billion. Up until 2009 the industry was growing on average around 2% to 3% a year, but growth has faltered in line with recent tough global economic conditions. However, the UK is still the world's second-largest market for market research, and is renowned for its innovative approach.

Research magazine publishes an annual league table of the Top 100 research companies in the UK, based on the previous year's turnover figures. Table A opposite is an extract from the 2010 Top 100 listing.

This short extract highlights one key issue with market research suppliers: the wide range of services that fall under the broad heading of 'market research'.

For example, TNS, Ipsos MORI and Millward Brown are all what might be termed classic market research firms. Each has its own specialisms, of course, but all conform to the basic model of a market research agency.

Dunnhumby on the other hand is a company built around data analytics, with a heritage based on analysing and interpreting the enormous amount of consumer purchase data collected via the Tesco Clubcard programme.

This illustrates the importance of understanding which compa-

nies specialise in which services, and which have which capabilities before selecting an agency, consultancy or a roster of suppliers. Also it must be remembered that there are many fantastic award-winning agencies and consultancies that are not in the Top 10 – the depth and breadth of suppliers in the UK provides plenty of choice for clients. The key is to pick the agency that can address your business problem and not to be automatically influenced by a well-known brand or the agency’s listing within a league table.

For example, it is sometimes important to select an agency with on-the-ground local offices in the advertisers’ key territories, and with the know-how and experience to manage a multinational programme from a central location. On other occasions there might be a need for experience and expertise in a particular industry, or to have access to a database built up from many years spent collecting the same type of data from which normative values can be calculated.

Market research, like many other industries, has gone through (and continues to go through) a period of consolidation. There have been many mergers – the most high-profile of which was WPP’s purchase of TNS in 2008.

Table A

UK research industry Top 10

The largest suppliers of market research, analysis and intelligence ranked by individual company UK-based turnover reported in 2009

		£m
1	TNS Research International	170.000*
2	Ipsos MORI	128.446
3	Dunnhumby	122.332
4	Millward Brown	107.040
5	GfK NOP	87.841
6	AC Nielsen	82.000*
7	Gartner	81.747
8	Synovate	73.892
9	IMS Health Group	61.500*
10	Datamonitor	55.352

Source: *Research magazine*

*Estimated

The *Research* league tables also include a table detailing consolidated ownership. Table B opposite shows the Top 10 UK research organisations, by ultimate ownership from the 2010 league tables, together with an approximation of each organisation's standing in the worldwide table.

While these tables make interesting reading, it is not correct to assume that size necessarily equals superior service, or overall excellence. In this respect, market research suppliers differ from those in other marketing services disciplines (media agencies, for example) where a certain size is necessary given the high cost of entry, and where gross billings are useful as a negotiating basis when dealing with media owners. In market research, many companies deliberately limit their overall size to allow the owners to offer a personal high-level service to their clients.

There are many smaller market research companies able to meet a host of requirements which (along with their larger, better-known cousins) can be identified through MRS's *Research Buyer's Guide*. Its website, www.theresearchbuyersguide.com, includes both a detailed search facility and a bulletin board, where visitors can post their requirements and let the research agencies find them.

b MRS and its role (including the MRS Code of Conduct)

MRS describes itself as serving 'all those with professional equity in provision or use of market, social and opinion research, and in business intelligence, market analysis, customer insight and consultancy'.

MRS has a wide membership of individuals and organisations in 70 countries worldwide, supporting its core values of 'professionalism, research excellence and business effectiveness.'

MRS is the world's largest professional association representing providers and users of market research and takes on a number of roles and responsibilities. These include:

- The setting and upholding of professional standards, via the *MRS Code of Conduct* (see pages 26 and 56); a number of schemes designed to support the organisation's professional standards; and a set of disciplinary and complaints procedures
- Public affairs and media representation, advocating research with Government, the regulators and the media
- Membership and benefits for individual research practitioners. Grade progression matches career experience, professional development and competence

Table B**Consolidated ownership Top 10**

The largest businesses in the UK-based market research, analysis and intelligence industry ranked by consolidated ownership (2009 figures)

		£m		
UK	World	Owner	Country	Turnover
1	2	WPP plc Operating companies: Kantar Group – TNS Research International, Millward Brown, Kantar Media, BPRI, Added Value, The Futures Company, All Global, Lightspeed Research, Kantar Worldpanel	UK	415.000*
2	5	Ipsos Group SA Operating company: Ipsos MORI	France	128.446
3	4	GfK SE Operating companies: GfK NOP, GfK Retail & Technology, GfK Animal Health, GfK Chart-Track, GfK IFR (UK), GfK Kynetec	Germany	124.700
4	13	Tesco plc Operating company: Dunnhumby	UK	122.332
5	1	The Nielsen Company Operating companies: AC Nielsen, BASES, Netratings	USA	89.800*
6	—	Gartner Inc Operating company: Gartner UK	USA	81.747
7	6	Aegis plc Operating company: Synovate	UK	73.892
8	3	IMS Health Inc Operating company: IMS Health Group (UK)	USA	61.500*
9	—	Informa plc UK Operating company: Datamonitor	55.352	
10	23	Cello Group plc Operating companies: Cello Research & Consultancy – RS Consulting, Consensus Research, Insight Research Group, Leapfrog Research & Planning, The Value Engineers (part), MR UK Research, 2CV	UK	52.143

Source: *Research magazine*

*Estimated

- The Company Partner Service – the corporate membership scheme which companies join to demonstrate that they uphold industry standards and comply with self-regulation throughout their organisation
- Professional development, including training programmes, qualifications, and work-based learning schemes
- Conferences and seminars highlighting the latest research thinking
- Awards recognising research excellence and business effectiveness
- Networking opportunities for personal and business development opportunities
- Information services including the provision of quarterly and annual industry statistics
- Encouraging research best practice and business effectiveness, through book, magazine and website publishing, including the monthly *Research* magazine and its associated website www.research-live.com, the *Research Buyer's Guide* and its website www.researchbuyersguide.com, and the *International Journal of Market Research*, which is published six times a year.

Of these activities, the most relevant to those commissioning market research is the *MRS Code of Conduct*. All MRS members and Company Partners must comply with the *MRS Code*, regardless of the particular sector of the industry in which they operate.

It should be remembered that unlike most marketing services disciplines, market research has to look in two directions at once: the very nature of a research agency's work brings them into contact with the public (including you and your customers); and of course they have end-clients to satisfy. The *MRS Code of Conduct* is vital in setting standards, and in helping MRS members and Company Partners steer a path between what are sometimes the conflicting interests of public and commissioning entity.

The *MRS Code of Conduct* is based upon ten key principles, which are summarised here:

- 1 Researchers shall ensure that participation in their activities is based on voluntary informed consent.
- 2 Researchers shall be straightforward and honest in all their professional and business relationships.
- 3 Researchers shall be transparent as to the subject and purpose of data collection.
- 4 Researchers shall respect the confidentiality of information collected in their professional activities.

- 5 Researchers shall respect the rights and well-being of all individuals.
- 6 Researchers shall ensure that respondents are not harmed or adversely affected by their professional activities.
- 7 Researchers shall balance the needs of individuals, clients and their professional activities.
- 8 Researchers shall exercise independent professional judgement in the design, conduct and reporting of their professional activities.
- 9 Researchers shall ensure that their professional activities are conducted by persons with appropriate training, qualifications and experience.
- 10 Researchers shall protect the reputation and integrity of the profession.

The market research sector has self-regulatory status and as such the *MRS Code of Conduct* is very important to how research is undertaken; MRS members and Company Partners will not countenance work that compromises the principles of the *MRS Code*.

Given the wide variety of research suppliers that either employ individual MRS members or are accredited as MRS Company Partners, the security in terms of professional standards that participation in MRS ensures, and the fact that those undertaking the research will often be either talking with your customers or representing your brand, those commissioning research would be wise to consider agencies that have MRS members or are accredited with MRS Company Partner status in the first instance when selecting an agency partner.

Indeed, client corporate social responsibility obligations regarding protecting customers, their data and so on may require clients to only use regulated suppliers – those linked with MRS.

c ISOs for research

You will see many references to ISOs within this document. ISO (International Organisation for Standardisation), the world's largest developer and publisher of international standards, is a non-governmental organisation that forms a bridge between the public and private sectors. Many ISO member institutes are part of the governmental structure of their countries or are mandated by their governments. Other members have their roots uniquely in the private sector, having been set up by national partnerships of industry associations.

The research standards – ISO 20252 (the main research standard covering the whole research process) and ISO 20252 (specifically for access panels) – were created by the research sector, supported by

the British Standards Institution (BSI). The aim of standards is ‘to facilitate business development and growth... and to define the level of requirement for service provision and common work procedures to be applied in processes, including across different countries’ (from the Introduction to the BS ISO 20252:2006 *Market, opinion and social research – Vocabulary and service requirements*).

Research agencies that have been assessed and certified to these standards meet the minimum research quality standard requirements. These standards should be looked for in addition to MRS accreditations as the two are separate: MRS addresses research ethics, ISO is all about processes and procedures.

d Other market research bodies

Although MRS is the pre-eminent UK body representing the research sector, other organisations do exist. Some are listed here.

ESOMAR (www.esomar.org). The European Society for Opinion and Marketing Research is ‘the world organisation for enabling better research into markets, consumers and societies’.

ESOMAR’s mission is to promote the highest standards in market research for improving decision-making in the public and private sectors. The organisation seeks to do this by:

- safeguarding the interests of the market and opinion research industry globally
- improving and promoting international best practice
- promoting the value of the industry to commerce and society

ESOMAR has approximately 5,000 individual members in 100 countries and produces various useful reports and guides. Among these is *The Global Prices Study* (the latest edition is dated 2010), reporting on research prices in 76 countries, and an annual report (done with KPMG) on the state of the global industry (*Global Market Research*). ESOMAR also produces best-practice guides, and has a Code of Conduct, which some local organisations mirror in their own Codes.

MRG (www.mrg.org.uk). The Media Research Group is an informal group of executives involved in market and media research primarily drawn from media and research agencies and media owners. The MRG was formed in 1964 as a forum to discuss media research issues. The Group is run by an elected committee taken from its membership, who organise regular (generally monthly) evening meetings,

an education course, a bi-annual conference and various social events.

Although the MRG has a role in education and runs evening meetings around specific and relevant topics, it has a distinctly informal and networking slant to its activities.

AURA (www.aura.org.uk). The Association of Users of Research Agencies was founded in the 1960s as a forum for the exchange of experience and points of view by a group of researchers in organisations commissioning market research.

AURA's membership is drawn from a wide range of organisations – from large corporations to small businesses, from FMCG to manufacturing and service industries. There are currently around 130 member companies.

Membership is open to client-side researchers and insight professionals, who should also be members of a professional body such as MRS, ESOMAR, the Chartered Institute of Marketing, the Association for Qualitative Research or the Social Research Association. It is not open to employees of market research agencies or consultants who work exclusively for agencies. The organisation's aims are all about the linking of research and insight to business results. AURA also acts as a forum for buyers of research to share experiences. AURA holds five meetings a year, in central London.

SRA (www.the-sra.org.uk). The Social Research Association is an organisation open to social research practitioners and trainees from all sectors, as well as others with an interest in social research. SRA produces its own ethical guidance and organises a number of social research training days, seminars, social events and conferences.

BHBIA (www.bhbia.org.uk). The British Healthcare Business Intelligence Association produces legal and ethical guidance for researchers involved in healthcare. In addition to an annual conference the BHBIA provides training courses and meetings.

BIG (www.b2bresearch.org). Business Intelligence Group produces a directory of members, has regular forum meetings, hosts training courses and has an annual two-day conference.

AQR (www.aqr.org.uk). The Association for Qualitative Research produces a directory and handbook of qualitative research and hosts regular training courses and networking events.

3

Market research agency structures

<i>a</i> Typical organigrams	33
<i>b</i> Typical role definitions	34
<i>c</i> Typical team structures and roles	35
<i>d</i> Managing budgets and costs	36
<i>e</i> Identifying key needs: The difference between data gathering and insight	37

The term 'market research agency' is something of a catch-all descriptor. The fact is (as indicated earlier) there really is no such thing as a 'typical' market research agency.

Generally, agencies fall into four types:

- Agencies or consultancies that specialise in qualitative research (focus groups, depth interviews and the like – explained on page 12)
- Quantitative agencies, who conduct 'classic' interviews among large groups of the population (explained on page 11)
- Agencies or consultancies that do both – the so-called full-service research agencies
- Agencies or consultancies that bring together specialists from across the sector and provide business and marketing consultancy services which includes research services

Some agencies and consultancies only provide the data (fieldwork-only suppliers) and leave their clients to write the reports and draw conclusions from the data themselves. Some specialise in analysis and software packages (a growing sector). Others specialise in particular industries or sectors (social research and healthcare agencies are examples).

For a full listing of agency services, and for advice on specific areas of expertise and sectors, the website for MRS's *Research Buyer's Guide* at www.theresearchbuyersguide.com is a very good place to start.

Within an agency there will be technicians and back-office executives – people you as a client may not necessarily ever meet. These people might be questionnaire writers, data processors, econometric modellers, fieldwork supervisors, administrators.

Within the larger agencies and consultancies (as in any other commercial organisation) there will be finance teams, commercial directors, senior management and so on. However, many agencies are small businesses, and may outsource some of these administrative functions. Consequently, at these smaller agencies, a client procurement team may find it hard to identify the appropriate person to engage with on commercial matters.

The groups that you will have the most day-to-day contact with, and who therefore might be described as the face of the agency to the paying customer, are the client service teams or client team. These teams represent the agency to you, the client. It is their responsibility to take the brief, to understand it fully, to brief internally so that the full and appropriate resources of the agency are brought to bear on the business problem at hand, to manage the project from inception

through to delivery, and to present the results and conclusions from the work to the client.

This is not to suggest that you will not want or need access to people beyond the day-to-day team – indeed as we shall see there will be occasions when you will both want and need to talk to those above or behind your team.

a Typical organigrams

Here we first describe a typical agency management structure, before focusing on those in roles that are likely to have a direct impact on the work the agency is going to be doing for you.

The agency will have the usual management structure comprising a CEO, a Managing Director, a Finance Director and sometimes a Chief Operating Officer. This team (and obviously in some smaller agencies and consultancies some or several of these roles might be combined) has overall responsibility for the efficient and profitable running of the organisation.

Depending upon the size of the agency and the nature of the work they do, there may well be a research and development director, a chief technical officer, statistician – all of whom are concerned with the related behind-the-scenes tasks of driving innovation and ensuring that the highest technical standards are maintained.

The client team will have a great deal to do with the management and support teams within the agency. It is the client team's job to co-ordinate internal resources and ultimately ensure the quality of the service delivered.

This means that the client team will constantly be assessing the latest thinking to emerge from the agency's research and development team (this is the team charged with keeping up to date with the latest thinking emerging from academia, conferences and case studies and from published papers) to ensure that any practical learnings emerging from the theorists are applied to the client's benefit.

At the same time the client team is also responsible for the general management, smooth running and indeed the profitability of their client's business within the agency. Well-run agencies assess profitability client by client and will make decisions, such as time spent on each individual piece of business and overall staffing levels within the client teams, with the aim of reaching target margin levels on each and every client.

Later in this section we expand on how agencies manage fees and service levels.

Although the client team is the main contact between client and agency, the client should not hesitate in building a relationship with others within the agency. Good agency senior executives will always want to have regular meetings with their clients, and clients should welcome an opportunity to discuss any issues concerning the overall state of the relationship with the agency's senior-level management.

Similarly the client will get the most from the research agency relationship by keeping up to date with key developments within the industry, either via the trade press (the best-known publication is *Research* magazine – see www.research-live.com) or via regular information presentations from the agency's thinkers. An interested and informed client is far more satisfying for the agency to work with than a client who is seemingly only interested in costs and how to reduce them. Clients who are sufficiently well-informed as to be able to recognise and appreciate good work will always find the agency prepared to go the extra mile for them, which is ultimately good for both the agency and the client.

b Typical role definitions

Agencies often use non-transferable job titles, which can be confusing to clients. One agency's Research Director will be another's Account Director and a third agency's Team Leader. What matters is less the title and more what each individual brings to the business.

Here we summarise some of the key titles and roles you'll come across – always bearing in mind that not all agencies have separate individuals in each position, and not all agencies use these exact titles.

CEO/Managing Director – responsible for the overall successful running of the company

Research and Development Director – ensuring that the latest thinking is available to be applied to client projects. This role usually exists only in the larger agencies and consultancies

CFO/Financial Director – responsible for the profitability of the business, and the smooth running of all financial transactions

Commercial Director – responsible for staff levels, fee structures, staff pay and conditions. This role usually only exists in the larger agencies and consultancies

Operations Director/Fieldwork Director – liaises with fieldwork suppliers/interviewers/data providers

Chief Client Officer – overall responsibility for the service levels provided across all of the agency's clients. This role usually only exists

in the larger agencies

Group Account Director – responsible for projects across a range of clients

Research Director – responsible for projects for a specific client

Research Manager – responsible for the day-to-day running of a project

Research Executive – assists the Research Manager

Research Assistant – assists the client team on specific client projects

Whatever the specific titles used, as the client you should know and understand the experience of the individuals in the team and the role that they are expected to play in the conducting of your project. This should be clearly defined in any proposal for work.

c Typical team structures and roles

The structure of a team depends upon the nature of the tasks required by the client. Most research projects (aside from continuous tracking studies) are just that – projects. Research agencies thus typically assign a team to a project – in an ideal world they would try to match their personnel to the experience of that client and that sector, and to the style and personality of the client team. However, this is not always the case: often the precise make-up of the team will depend more upon availabilities and less upon relationships or even relevant sector experiences.

As in any service industry, the relationship between the team supplying the service and the client is crucial. The quality of this relationship can be the difference between success and failure on any project. In a successful relationship, the client will benefit hugely from the extra effort that the agency will make on their behalf. The agency will always be thinking how best to benefit that client; the agency will be forever bringing new ideas and initiatives to those they know will appreciate them. After all, we all work better when we understand each other's needs, and when we feel appreciated.

The client should ensure that they are happy with the team assigned to the business, and that the key people involved have the necessary, relevant experience for the task in hand. The client should also always feel able to request a change in personnel if it is felt there is a good enough reason to do so. This is inevitably far cheaper and less disruptive than putting the project up for competitive review.

The typical team will comprise a Team Leader (or Research Direc-

tor), a Research Manager and a Research Executive and/or Assistant. These roles are hierarchical. The team's key task is to understand the client's needs and to produce a research programme to deliver to those needs.

Typical quantitative tasks will include quoting prices for the task, questionnaire writing, fieldwork briefing, quality control, data analysis, data interpretation, report and presentation writing, and delivery.

If the task is qualitative in nature, typical tasks will include booking and briefing a recruiter to find appropriate respondents, finding and booking appropriate facilities for the focus group or the depth interview, selecting and briefing a moderator, evaluating results and summarising them in a report or presentation.

The size and scope of both the task and the agency will dictate how these tasks are carried out. For example, on a major project the pricing may already have been agreed by the client with the agency's management. In a larger agency the matter of quality control over fieldwork and other operations might well be out-sourced, either to a fieldwork specialist agency, or to a separate division within the agency or its holding company.

d Managing budgets and costs

Market research is a highly competitive business, with new companies emerging almost every week and existing companies adding a sometimes bewildering array of new services.

Given this competitive and ever-changing context, some clients believe that they can reduce fees paid to an agency without affecting the way in which their business is run. Of course, it may well be possible to reduce fees by moving the business to a different agency with lower overheads, or a more modest cost structure but, like for like, an unnegotiated reduction in fees will almost certainly affect the way in which the agency runs the client's business.

Faced with a reduction in fees from a client, over time the agency, like any other business, will take steps to maintain its margins on the business, which will inevitably include reducing the level of specialist support or the seniority (and cost) of the service supplied.

Should the client become unhappy with the reduction in service level, the agency finds itself in a difficult situation. Instinctively, it will want to deliver a superior service to the client, but at the same time it faces the usual commercial pressures to maintain margins while fee revenues are reduced. In these situations it is much better

for clients to discuss their costs pressures with the research agency and to work with them to decide upon a research programme that will still produce the right business solutions but perhaps utilises a different approach to address the cost issues. As with all client–supplier relationships, working in partnership produces a much better result than enforced cost reductions without any discussion or exploration of alternatives.

Expecting the agency to maintain the old high levels of service under a new, reduced fee structure, and the often inevitable move by the agency towards a lack of transparency, is inevitably counter-productive and leads to dissatisfaction with the supplier–client relationship within both organisations.

To avoid this dissatisfaction, it is important that the client and the agency work over time to build a strong enough relationship for a dialogue of equals to take place. Agencies will understand the reasons why budget levels sometimes have to be reduced. Clients will appreciate that agencies have a business to run, and that a large part of any agency’s costs are in people.

The agency should welcome this sort of open discussion, as the client will start to understand how research costs are built. Every research project is different; there are a number of steps to be completed, many of which will likely involve operations that are separate from the main research agency and the client’s team.

Agencies that do explain themselves, and who involve their clients in discussing together whatever major issues occur in the running of their accounts, are generally those that hang on to their clients for longer. These agencies are appreciated more by their clients; they add more value as they gain experience in the client’s sector and his business and they make higher margins on the business in the long-term.

e Identifying key needs: The difference between data gathering and insight

At the beginning of this Guide we described market research as ‘the collection and analysis of information about markets, organisations and people to support better business decisions’. We went on to say: ‘Research that is properly structured can be used to deliver information that can provide insight into a target audience’.

The fact is that data on its own is virtually useless; the value comes from interpreting the results and understanding their significance within a business context.

This process of distilling what can be thousands of pieces of data into something that contributes significantly to a business strategy, or an actionable decision, requires skill – combining as it does creative thinking, business skills and understanding, and competency in looking at and understanding data.

This skill is often described as ‘insight’; it might more properly be seen as analogous to the work done by an account planner in an advertising agency, or to elements of the work done by management consultancies.

A criticism commonly levelled at market research agencies is that they are staffed primarily by technicians – by people whose main focus is on all of the tasks that need to be done to collect and report on data.

Of course, technical competence such as questionnaire writing or sample design is essential. Handing over data that has been collected in an incompetent manner invalidates everything that comes after. No amount of insight can overcome poor data.

But great data without insight is almost as useless to the client as poor data.

Clients want research to help address business issues; they don’t want perfect research and data that hides the one vital piece of knowledge or insight they need to make a decision.

Executives able to turn data into insights are invaluable. Clients buying research services should expect to pay for these skills and should make it clear to their agencies that this is what they want.

Planning and executing a research programme contains (as we’ve said) many different elements. Each of these can be catalogued, with time and prices set against them. A crucial step – often not catalogued, not properly priced and not evaluated – is the turning of the base metal that is data into the gold of the true business insight. If clients want this level of expertise they must highlight this at the outset and budget accordingly.

4

Ensuring quality

<i>a</i> Five principal considerations	40
<i>b</i> Ensuring a quality output and a competitive price	42
<i>c</i> Ensuring quality is maintained	44
<i>d</i> Guidance on basic briefing principles	46

It goes without saying that any client commissioning market research has a right to expect that quality standards are maintained throughout the length of the project.

Individual MRS members and MRS Company Partners are bound to maintain the professional standards defined and laid out by that organisation. The MRS's professional standards and *Code of Conduct* are clearly laid out on their website (www.mrs.org.uk) and cover the way in which research should be conducted.

But it is of course incumbent upon the commissioning client to play his part in ensuring that the research conducted on his behalf is useful, and fulfils the purpose for which it was intended. This section is intended to help clients achieve this.

a Five principal considerations

One. As a first principle, ensure that you know exactly why you're commissioning the research project. What business issue is the research aiming to address, and how will the results be used within the business?

This might seem obvious – but surprisingly often the reason for commissioning the research is '*because we always do it*' or '*we need to update our dashboard*'. In terms of the development of a research programme, problem definition is one of the most important elements and can be one of the hardest things to achieve. This needs to be investigated fully before any research is commissioned (see page 9).

Too many dashboards are not used to inform decisions – their purpose can sometimes seem to be to provide a sense of comfort to a management group, who may well have long forgotten the reasons why they're collecting the data they're commissioning or the business issue they are attempting to tackle.

This is by no means to suggest that management dashboards are of no value – just that the data that fuels them and their purpose should be reviewed from time to time.

It is also true that the many ways of discovering what the business needs are have evolved as technology has evolved. The most obvious example of this over recent years has been the use of the internet as a vehicle for asking questions; but there are many other examples, ranging from advanced data analytics as a way of tracking behaviour, through to using mobile phones as a collection mechanism.

For many years it has been argued that the need for consistency in data output is a reason not to change anything. The counter argument is that collecting the wrong data consistently does not turn it into the right data.

Should there be a need to change research methodology from that used previously, or the frequency of collection in order to (for example) save money, your research agency will be able to explain the implications of such changes on the resulting data and can advise you of the various options that exist to ensure that data comparability can be maintained.

Two. The second principle is to seek the input of key stakeholders at the start of the process. Much research output is ignored by the very person whose support is most valuable on the basis that ‘no one asked me what I felt we needed to know’.

It is easy enough to ask for input and opinions at the front of the project, thus avoiding problems at the back. Furthermore, following this principle allows you to pre-sell the importance of the project to the key stakeholders in advance. This will help secure their attention and interest in the results.

Three. Make sure that the research you’re commissioning does not duplicate existing knowledge. In some instances, clients spend time and money commissioning work they really don’t need to commission – as the knowledge already exists somewhere within the organisation. It’s almost as if it’s easier to ask for the work to be done again, rather than search for the original work. Of course this wastes money that can perhaps be usefully spent advancing knowledge in a different area.

Four. Next, make sure you have the right research agency or specialist for the job. Not all research agencies are the same; there will be some that have specialisms or expertise in certain aspects of your business, and in these cases it will almost certainly be worth paying a bespoke premium rate for these services in order to make sure that the job is done well, answering your business challenge.

Five. Finally, spend time writing the brief so that it is as thorough and complete as it can be. We discuss what constitutes a good brief later in this section (see page 46). You can also request ISBA’s *Top Tips Guide to Briefing MR Agencies* by emailing tracid@isba.org.uk.

b Ensuring a quality output and a competitive price

Quality output – delivery of results

It is essential to be clear, from the start of planning a project, on what you want the final output to look like, so that it will best fit the business purpose the project is designed to address.

For example, it may well be that the research is designed to address in detail a specific and precise issue, such as concept testing the design element of a pack. In such an example, the detailed results of the research are unlikely to get the attention of senior management, but are going to be essential to those responsible for the pack design.

In this example, you could expect the output to be reported via a detailed presentation, and supported by a written report to be given to those intimately involved in the issue under investigation. The audience should be expert in the topic and will expect the findings to be gone through in minute detail.

A second example might be that the research is designed to address whether or not a particular product has a future. The results of this research are unlikely in themselves to determine such a fundamental and multi-faceted business decision, but they will play a key role in the decision-making process and therefore should be presented appropriately to the correct audience.

In this example, the shape and format of the final output needs to reflect the fact that the audience will be made up of senior general management, for whom the research results will be but one input into a major decision. The output therefore needs to be pithy and to the point – maybe a short presentation and report summarising the key findings.

There are other instances when the output might be a workshop, at which the research is dissected and discussed, or a short video designed to engage the final audience, or an online webinar or presentation to colleagues overseas.

It is important to be clear – upfront – what shape the final output will take, through which medium (report? presentation? film? internet? combination?) and the target audiences that will receive it.

Some researchers prefer to provide all the technical details. This might be desirable (although in our experience it rarely is) but too often this approach to the final output risks burying the true gems to be found within the results under a pile of potentially unnecessary detail.

Research results if not delivered in the appropriate format for the audience can come across as dry. It's important to ensure that the

results are brought to life by preparing adequately in advance. In this way the target audience will be more likely to remember the recommendations and to act upon them, thus ensuring that the research investment has been truly worthwhile. The way the findings are presented need to fully inform the decision-making process – for example, indicating what the appropriate actions might be to address the issues that led to the research being commissioned.

Competitive price analysis

As we've said, the market research industry is highly competitive (a situation largely due to the sheer number of research agencies and consultancies out there). Costs can vary between what might on the surface appear to be comparable offerings, and it is not always easy for the non-research specialist to be able to disentangle the different elements of cost that go into a full quote for a particular project and decide which proposal offers the best value for money.

It is important that the principle of full transparency is applied in any quote. It is therefore entirely reasonable for a client to expect their agency to provide a full cost breakdown of the individual elements of a proposal or ongoing research programme, but in keeping with the sentiment of a previous ISBA booklet, *Magic and Logic* (tinyurl.com/64npom4), it is not always possible to define the cost of the creative/ideas elements.

This full transparency is the only way that clients can ensure that they're not being charged for elements that might not be required, while at the same time feeling confident that an appropriate level of resource will be set against those elements of the greatest importance given their particular needs.

At the same time, this principle allows clients to compare and contrast elements of cost from different suppliers, so that they can satisfy themselves that they are investing wisely.

One key element of cost is the time spent by the client team (see page 32) analysing and interpreting the results of the research. As we've said above, there is a real skill in turning the base metal of research data into the gold of business-critical insights. It is therefore important that sufficient time is allocated to this skill, as this is where the research agency can add real value to your business, while at the same time differentiating its offering from those of its competition.

It is much more important that a client feels that he is receiving good value for money from the supplier as opposed to always gravitat-

ing towards the cheapest price. One example, concerning qualitative research in the pharmaceutical industry, serves to make the point. A research agency had on its staff a moderator who had gathered a great deal of experience interviewing respondents about a particularly sensitive medical condition. This moderator had a manner, a skill in putting respondents at their ease so that they felt able to discuss their condition openly and without embarrassment.

There is no question that, looking at basic hourly-rates, this moderator was more expensive than others with, on paper, a similar number of years' experience – and yet his particular skill meant that not only did the work generate more valuable results, but the client also saved in the long run by needing to allow for fewer days for re-running interviews that for whatever reason had not worked well.

As you will see explained in *Costings* on page 50, research agencies generally calculate costs in units such as number of interviews, or number of focus groups. This is of course legitimate – they have costs related to the units of research. But another way of calculating value for money from the client's perspective is to assess the size of the problem to the business, and the true value of being able to solve it. Research agencies are professional service providers and business consultants, and as such they should be assessed similarly to other professional service suppliers. Equally, cost breakdowns should be provided with the same level of transparency as in other professional services.

The internal client team (including procurement, marketing and research) need to agree on all aspects of a project before issuing the brief to competing research agencies, and beginning the process of assessing and comparing costs.

All three client stakeholders mentioned above need to understand the key elements within a proposal that emerges from the agencies, and each needs to respect the expertise and point of view of colleagues. When research projects go sour it is often because of internal strife within the commissioning client and steps should be taken to avoid this type of internal conflict which ultimately costs all parties unnecessary time and money.

Internal alignment and agreement before anyone even approaches potential research suppliers will lead to far happier and more productive partnerships with the selected agencies.

c Ensuring quality is maintained

As your market research programme commences, it is important

to take steps to ensure that the anticipated quality is maintained throughout the assignment.

To begin with, it is worth asking yourself – again – whether or not the agency’s response to your research brief is truly about answering whatever business question you’re seeking to address. Many agencies develop particular tools and techniques of which they’re justifiably proud. In many cases these tools and techniques have been designed to address a large number of issues – you simply need to be certain that your specific issues are among them, and that your particular needs will be met.

Next, it is advisable to agree upon a service level agreement (SLA) (see page 62). SLAs within the market research industry are not all that common and, if used, can be based on sector requirements as defined in the *MRS Code of Conduct* and the international research standard, ISO 20252 (see pages 28 and 63). So they may not contain all of the same elements clients are used to seeing – but the principle should be the same: namely to ensure that expectations of service levels are set, defined, met and measured.

Many SLAs include a provision for bonus payments. Again, the practice of withholding some elements of payment (those elements directly associated with client service), making them conditional upon the delivery of a service, and budgeting for a bonus element to be included should the agency deliver above stated, defined expectations is not necessarily usual in the market research world, although this approach has been adopted by some government clients. Therefore clients should be prepared to clarify how this type of remuneration model works when speaking with agencies not experienced in this area.

Many client companies have standard SLA forms. If such a form exists it should be reviewed by the internal research team and if necessary be amended to be relevant to the specific demands of the market research world, particularly *MRS Code of Conduct* requirements that place specific obligations on MRS members and Company Partners in areas such as the way research results are reported by clients (see pages 56 and 57). In developing an appropriate SLA format, careful consideration needs to be given to how outputs will be measured.

Research agencies, like most marketing service suppliers, pride themselves on the maintenance of high standards. They want to do a good job for their clients – and they expect to be fairly paid for doing so. Like many of us they are sensitive to what they see as unfair and ill-informed criticisms of their professionalism. If they feel that they

are being pushed unfairly to reduce costs, with no parallel 'give' on elements of service delivery, they will reduce service levels.

It is apparent, and supported by the research ISBA carried out for this Guide, that many within the market research world feel that the sole aim of procurement in the research process is to reduce costs by whatever means, rather than identifying value for money. This is a perception barrier that needs to be overcome. A desire to be firm on service delivery is understandable – but being firm and fair will lead to a stronger relationship and ultimately a better outcome for all involved.

d Guidance on basic briefing principles

This section should be considered alongside ISBA's Top Tips Guide to Briefing MR Agencies available by emailing tracid@isba.org.uk.

Be clear and succinct

The first key principle is that a good brief is a thorough written document and should be delivered, where possible, face to face. But, as is the case with many other disciplines, many briefs get taken down over the phone or covered in a short email. Such briefs can lead to misunderstandings, and often to ill feeling over why what is delivered didn't meet the objectives.

A good brief is clear and unambiguous and sets clearly defined objectives. It provides sufficiently detailed background to the proposed project, and the client organisation, to enable a prospective research agency to provide an informed response. It explains how the research will be used, and by whom. It details the deliverables (the method to be used to disseminate the research results, for example). It is achievable within the stated and necessary timescale. It contains full background on the company, the product and the category. If there is a budget already agreed for the project, then research agencies need to know this.

The agency will want to share the brief with colleagues, and so it must stand alone as a piece of work; it must be understandable to those readers who are unfamiliar with your business and the background to the research being commissioned.

Any client 'must haves' or unbreakable philosophies must be made clear. For example it may be absolutely essential for the respondent to see and feel the product. Or it may be that the client has decreed that online questionnaires simply don't work for his or her category. Maybe the key objective is to provide updated data to track trends. Stating these 'unarguables' upfront will save a good deal of time and possible angst later.

A common mistake is to treat the briefing process as a test that the prospective research agency must overcome. Rather than testing an agency's knowledge on a business about which they are likely to know little, a good brief informs by sharing as much knowledge as possible.

Encourage questions

The written brief should, where possible, always be accompanied by a meeting, or presentation by the client. If a face-to-face meeting is not possible to deliver the brief, the agency should be encouraged to question any assumptions within the brief and to ask for clarification of any points. The client should set aside time to deal with these queries and answer any questions.

Another emerging trend is to brief all the agencies under consideration at the same time. If a client is considering this type of activity, they should bear in mind that by default this method of briefing can discourage questions and honest discussion at the time. Consequently, as above, additional time will need to be set aside for the client to answer specific questions following the live briefing session – clients therefore need to decide whether this is ultimately a time-saving exercise or not.

Outcomes and outputs

You may well come across the expression 'outputs versus outcomes' when it comes to setting priorities within a brief. *Outcomes* are all about what you as a business will do as a result of the research. *Outputs* are about delivering data or metrics such as dashboards or spreadsheets – too many of which are simply updated without any further thought being given to the real purpose to which they are being put.

In our view the most valuable research tends to be concerned with outcomes (or what the business will do as a result of the research). But of course outputs can be valuable, as long as there is clarity behind what the data is for.

A good example of a useful output might be research conducted for a brand where it has been proved that a certain metric (such as the percentage of a target group stating that XYZ Brand 'is a brand for me') is a strong predictor of sales success. In such a circumstance, monitoring the percentage agreeing with the 'brand for me' statement becomes a valuable tool.

Best-practice behaviour

Finally, it is considered bad practice within the research world to brief more than three agencies for a particular job. It is also considered bad practice to take an idea that you particularly like from one agency's response and use it through another agency. Remember research proposals responding to client briefs may contain intellectual property owned by the specific research agency, and therefore may not be a client's to share with others.

As we've said before, the research world is a small one – and a client who builds a reputation for behaving in what is seen as an unfair fashion will lose out as agencies will simply not put their best ideas forward in response to any brief put out to multiple agencies.

Ultimately the partnership approach to client-agency relationships which we are advocating within this Guide can only work if both client and agency operate, to the best of their knowledge, within the best-practice parameters we have laid out for you. Clearly, either side regularly carrying out what is generally accepted as bad practice will hinder the creation of a 'partnership' working relationship and will inevitably result in bad client and agency relationships.

5 Costings

<i>a</i> How costs are built	50
<i>b</i> In-house <i>v</i> third-party costs	51
<i>c</i> Guidelines on balance of costs	51
<i>d</i> Underlying changes in the research industry and their effect on costs	53

a How costs are built

Market research agencies typically charge in units, such as ‘so much per interview’ or ‘so much per focus group’. Naturally there are considerable variations: hard-to-find groups of consumers (such as upscale men) typically cost more to recruit and therefore to interview than more easily found groups. Longer questionnaires cost more than shorter ones. Focus groups that are recorded cost more than those that aren’t, and so on – but the most common basis of costs is units of work.

Within this simple formula there are various standard costs, which include:

set-up costs – These include designing data collection instruments such as writing the questionnaire (or topic guide in the case of focus groups) or recruiting respondents (where appropriate, such as focus groups, depth interviews, some online surveys).

fieldwork costs – These vary depending upon the scope of the job, but answers to the following questions will largely determine the costs. How many respondents? Who are they? How long is the questionnaire? Is the topic of the research considered boring to many respondents? What is the desired strike rate (the number of interviews to be conducted per day)? What is the nature of the questions (open-ended questions, which require the interviewer to note down whatever the respondent says, cost more than those questions with a set of pre-coded alternatives for the respondent to choose from)? Are incentives to be used?

interviewer and moderator costs – These are made up of fees for the work, travel costs and sometimes (particularly in the case of focus group moderators) overnight accommodation and subsistence.

venue costs – Some research requires the use of venues, which need to be hired. Venues include halls, set up with equipment for respondents to use to go through a questionnaire either on their own or with the help of an interviewer, through to a hotel suite for a focus group. There are customised venues for qualitative research, with facilities to record the groups, and with two-way mirrors to allow the client to view the groups in progress.

executive time – The most important element of cost and the most frequently under-reported. There are two key elements that make up what is generally referred to as ‘executive time’. First, project management time, ensuring that the project runs to time and on budget, and with liaison throughout the process with the client.

Second, once a programme of research has been conducted and the results compiled, time is spent on analysis, sifting through the mass of data to find the valuable insights hidden within. Clients sometimes criticise research agencies for not understanding the difference between data and insights. The key is ensuring that the right executives are deployed and have time committed to ensuring that the insight is appropriately communicated. Remember research is a consultancy service: the research techniques produce data, but it is professional researchers that deliver the insight (always assuming that the client has indicated they require such interpretation and expertise).

Many clients seem to think that ‘executive time’ is a catch-all descriptor that covers intangibles that somehow shouldn’t be charged for. The reality is that a skilled interpreter is of immense value to any research project. You should reassure yourself that sufficient budget and time has been set aside to unlock this value.

As we’ve stated, research agencies typically are not used to breaking out their costs beyond the basics of cost per interview or cost per focus group. You should encourage them to provide you with a breakdown sufficient for your needs, and ensure that they do so.

b In-house v third-party costs

There are few research agencies able to maintain a full complement of full-time staff with every skill required to complete a project.

It is thus quite usual for the agency to subcontract work to other specialist suppliers or to freelancers. It is sometimes quite legitimate for the main, client-contracted agency to add a margin to third-party costs, particularly if there is work involved within the main agency. In these cases the client should be advised of the need for additional resource.

You need to be aware of any third-party costs and satisfy yourself that any added margin is justifiable.

c Guidelines on balance of costs

As illustrated above, there are any number of variables that affect the cost of a market research project. It is thus not realistic to set hard and fast rules on the balance of costs within a given project.

It is reasonable to expect a quantitative project to allocate the same amount of budget to the running of the job and the interpretation of results as to the actual doing of the research. To reiterate the point above: it is crucial to ensure that sufficient time and resource exists

within the 'executive time' element to make the most of the investment made in the research.

In qualitative research (see page 12) the majority of costs will often come under the 'executive time' heading (there is less recruitment and 'interviewing' as such within qualitative studies, and moderators are often senior in-house staff members).

There are no easy, published norms in market research (along the lines of 'a 10-minute interview costs £x'). This is to be expected, given the variation and scope of projects undertaken. Over time a client organisation will build its own norms, based on experience within their particular sector. This is an area where in-house research knowledge and commissioning expertise is key to ensuring value for money.

d Underlying changes in the research industry and their effect on costs

There is no question that developments in technology have had a major effect on research techniques and methodologies and on costs. An obvious example is how the spread of internet access has made online questionnaires a commonly used method of collecting information.

A similar technological advance is the growth in smartphones and mobile applications – this emerging technology is leading innovative research agencies to use mobile devices as a vehicle for collecting data very close in time to the respondent experiencing the product or service being researched. It is worth noting that mobile data can only be appropriate if the target demographic has the right sort of device.

Online interviewing (and mail surveys) is cheaper than face-to-face interviews. For one thing, there is no actual interviewer involved, and respondents are, in answering pre-coded online questions, often in effect entering their responses directly into the agency server, thus saving on data entry costs.

However, online interviewing is not always the best technique. For example the presence of an interviewer can sometimes persuade the respondent to give more detail leading to richer data.

It is also generally acknowledged that face-to-face interviewing is a more appropriate technique if the questionnaire is designed to probe emotional matters, to interrogate a process (such as the steps along the route to a purchase decision) or for conducting a product test (e.g. a new formulation of a soft drink).

On the other hand, it is often easier to show the respondent a piece of prompt material – like a commercial, an article, a piece of editorial,

or a print ad – online rather than as a part of a face-to-face interview.

One major concern with online questionnaires is that it is impossible to be sure that you are truly ‘interviewing’ the demographic you think you are. Many agencies run quality checks to be as certain as they can be that respondents are who they say they are. There is a separate international standard, ISO 26362 (see page 28), which specifically covers research access panels and how to manage them.

The key point is that the method selected (be it face-to-face, online, postal, telephone or mobile) should be based on what the research is attempting to achieve, and from whom. It is not sensible to decide on a particular methodology regardless of objectives or respondent demographics. In other words, decide what your business problem is and who you need to contact to address that issue, and then decide on the most appropriate method (or methods, as sometimes a combination makes sense) – not the other way around.

Common sense and good business judgement also play a role here. Market research is after all an aid to judgement, no more, no less. The non-research specialist should not feel in any way out of place commenting on a methodology or research approach and requesting an explanation for a particular choice.

It is also sensible, and perfectly acceptable, to be creative when it comes to establishing a method. A good example was some work done for an alcoholic drinks brand – which involved members of the marketing team playing the role of observer in pubs and clubs. In this example, the marketing team were able to see first-hand how their brand was consumed and by whom. This technique yielded valuable insights which in this instance were more useful than face-to-face or online questioning taking place some days after the drinks were consumed.

Another example is interviewing passengers about their experience of a train service. By conducting the interviews during the journey, more valuable, richer data was collected as a result of the respondent not having to recall, out of context and days later, their thoughts on certain aspects of the in-train service.

It is important to trust the researcher and the internal insight team, and to feel free (as a non-specialist) to suggest approaches and debate the use of methodologies that make good business sense to you.

But remember also to hear about some of the new techniques with which you may be unfamiliar. For example, increasingly neuroscience is teaching us more about how people make decisions. As

another example, conducting a lengthy interview about a decision that people make automatically and subconsciously will not yield useful data. Sometimes 'don't know' is the only appropriate answer.

6

Typical terms of business and remuneration models

<i>a</i> Typical terms of business: what's generally included and what can be included	56
<i>b</i> Typical remuneration models – and how they're changing	58
<i>c</i> Syndicated research: The differences in terms of business	60

Every project is different, every set of circumstances, every agency – and therefore the details within client–agency agreements are different. While this is true, it is also the case that there are certain principles and guidelines that can be helpful as you consider contracting with a market research supplier.

a Typical terms of business: what's generally included and what can be included

Market research agencies generally have a template set of terms and conditions attached to every proposal. It goes without saying that you should read these (or pass them through your in-house legal team if you have one) and question any elements with which you're unhappy. However, you should be aware that some of the terms will be based on standard responsibilities such as those defined in the MRS *Code of Conduct*.

The MRS *Code of Conduct* contains 74 different rules, too many to mention here, but there are some key rules that clients should be aware of. These are areas that research agencies must retain control over to meet the sector's selfregulatory requirements. Here are some of them.

- Research agencies must conform to national and international legislation. For research the Data Protection Act 1998 is a key piece of legislation in setting the parameters in which research must be conducted. Certain *Code* requirements actually relate to legal data protection, for instance:
 - Where lists of named individuals are used, e.g. client databases, the list source must be revealed at an appropriate point in the interview, if requested. This overrides the right to client anonymity.
 - The anonymity of respondents must be preserved unless they have given their informed consent for their details to be revealed or for attributable comments to be passed on.
 - A follow-up interview with a respondent can be carried out only if the respondent's permission has been obtained at the previous interview. The only exception to this is re-contact for quality control purposes.
 - Client goods or services, or vouchers to purchase client goods or services, must not be used as incentives in a research project being conducted on behalf of that client.
- Research agency names can only be used in connection with a project if they are satisfied on reasonable grounds that the project has in all respects met the *Code's* requirements.

- Research agencies must take reasonable steps to check and where necessary amend any client-prepared material prior to publication to ensure that the published results will not be incorrectly or misleadingly reported.
- If research agencies are aware that findings from a project have been incorrectly or misleadingly reported by a client they must at the earliest opportunity
 - refuse permission for the client to use their name further in connection with the incorrect or misleading published findings; and
 - publish in an appropriate forum the relevant technical details of the project to correct any incorrect or misleading reporting.

Some suppliers don't include what might be considered by many clients to be basic services within their proposals. For example, having an agency's executives presenting research results to a client might incur an additional charge, as might the provision of anything beyond the most basic level of feedback on the research results. As a client you may not require these services, but it is important that everyone is clear as to just what is included within the proposal and what is classified as extra services which will need to be paid for.

Many research agencies are not used to having a client's specific terms and conditions imposed upon them, although as procurement teams start to become more involved in the commissioning of market research, and as it becomes more common for clients to establish rosters of suppliers, this is becoming much more commonplace.

As we've seen, in many cases research suppliers subcontract services to third parties. It may be that the contractual relationships that exist between the main research supplier and their chosen subcontractors do not fit within the contractual parameters established by the client in his dealings with his marketing service suppliers.

The opportunity for these 'contractual disconnects' to cause problems and ill feeling as the research programme progresses is there. For example, the client might believe that he has contracted his research agency to deliver a certain number of interviews, as part of a research programme. The research agency might accept the commission in good faith, but then might find that for whatever reason the subcontracted fieldwork company delivers fewer interviews.

There might be good reasons for this. The research agency's terms and conditions might state a period of time to deliver the interviews, and conditions outside the agency's control (like bad weather) might mean that the number of interviews completed within the period

falls short of the target.

This sort of shortfall may or may not be significant, but it is important that the client is fully aware of the agency's terms of business, both its own and those covering any work that is subcontracted, and that for its part the agency is made aware of the client's standard terms. For instance, in the example quoted above, the client might be prepared to allow for a certain degree of latitude in the number of interviews to be delivered, or he may take the view that the number agreed to is the minimum necessary to meet his requirements.

The point is that all issues of delivery need to be agreed upfront by agency and client and not argued about at the end of the process, by which point it is really too late to do anything beyond agreeing a level of compensation.

b Typical remuneration models – and how they're changing

Within a research agency contract it is commonplace for the agency to expect to be paid a proportion of its fee upfront. This is to cover third-party costs incurred when the agency books such facilities as venues for qualitative research or for computer-assisted quantitative interviewing, resources such as external interviewers or the preparation of prompt material (videos, concept boards, advertising materials and the like).

Within a typical contract the agency might request half of the fee upfront and half on completion, although there has been a recent trend for agencies to request that clients pay more than half of the fee upfront.

There is no standard within the research sector as to how payments should be phased – the agency will have worked out where and when its payments to suppliers become due, plus of course they will have calculated the extent of staff and overhead costs associated with the project from day one.

While it is unreasonable for any clients to expect their research agency to jeopardise their financial stability by paying third-party costs upfront before receiving payment from the clients, it is entirely reasonable for the client to request an explanation for whatever payment scheme is proposed, and to have some understanding of the agency's cashflow on a project. In the case of long projects, say those lasting over three months, it may be appropriate to split the deliverables and to pay when each is complete.

It is also of course important that the agency respects and works within commercial terms that reflect how the client generally works

with suppliers. Research agencies have as we've said historically attached their own terms and conditions to project prospectuses, and clients should be aware that it is perfectly acceptable to challenge these terms – except those legal and ethical MRS *Code* requirements – in order to get to a mutually acceptable position.

For example, unlike certain other marketing service suppliers, many research projects (especially qualitative studies) can involve considerable amounts of travel and incidental expenses. Clients should ensure that their defined policy on these is understood and is followed by the research agency.

It is also true that some research agencies charge their staff out either by the hour or by the day. Many research projects involve an amount of executive time being spent over a concentrated period, as deadlines are met. It therefore makes sense for the client to pay a day rate as opposed to an hourly rate, given that suppliers will typically work more than 7.5 hours per day.

These days, many major research projects cover multiple markets. In these cases, one element of the agency's service required by the client may be a general management function that coordinates activity across all appropriate geographies, as well as summarising and interpreting findings. It is worth ensuring that the agency clearly identifies central and local-level activities.

Finally, TUPE (EU regulatory legislation to protect employees) can be an issue and should always be considered within any terms and conditions of business. ISBA provides members with detailed advice and guidance on this topic (tinyurl.com/6jye4dj) but within this more general context it might be desirable to limit the number of hours executives work on major ongoing client projects to less than 50% of their time. The TUPE legislation gives considerable rights to professional services employees: legal advice should be sought and a clause or clauses inserted in any contract in order to reduce any exposure to such claims.

Some clients do unfortunately build a reputation as bad payers. Agency staff do move around a great deal, and socialise frequently among themselves. It is not in any client's long-term interest to be known as poor payers, as agencies will react by reducing their staff costs as far as possible on projects (thereby reducing service levels) as a way of carrying less debt on the business.

It is important the client bears in mind that many research agencies are small businesses, with inevitable cashflow problems. In the same way that the client shouldn't expect the agency to pay agreed third-

party costs upfront before being paid by the client, so the agency shouldn't expect the client to underwrite the business. Some sensitivity and common sense is called for on both sides.

c Syndicated research: The differences in terms of business

Syndicated research is generally research owned by the research agency and sold to subscribing clients, and so in effect many clients buy the same data.

Given that in syndicated research all operational research costs are borne by the research agency, who then make their money by selling subscriptions, syndicated data is less expensive to the end client than customised research.

At the same time, though, the data is not exclusive, nor is it designed to meet the needs of any one customer over the needs of the majority.

Syndicated surveys are priced via a rate card – and are usually sold on an annual basis (although the frequency depends on the specifics of the subject matter and on the level of interest amongst subscribers).

It is sometimes possible to buy bespoke questions on the back of a syndicated study. This can be done by adding questions to the standard questionnaire – in which case the client pays for the additional bespoke questions, the results from which are unique to the client and are not shared amongst other subscribers.

It is also sometimes possible for clients to commission a study that re-contacts respondents to a syndicated study. Within this model, the research agency poses bespoke questions to those respondents agreeing to be re-interviewed. The results from these re-contact questions can then be analysed in a way that combines the re-contact results with the original syndicated results. One of the UK's most successful syndicated studies, Kantar Media's Target Group Index or TGI, will consider such re-contact programmes. In this case too re-contact results are unique to the commissioning client and are not shared with other subscribers.

Some specialist syndicated studies, such as those covering specific industries are prepared to discount the cost of their surveys in return for expert input from those clients prepared to contribute their time and knowledge to the survey's development.

Sometimes, however, a group of clients commission syndicated research projects where the project would be owned by, or on behalf of, this group.

7

Service level agreements

a Building a service level agreement

62

b ISBA's marketing industry guidelines

63

a Building a service level agreement

While it is not universal for research agencies to work with service level agreements (SLAs) there is no particular reason why this should be the case. Historically, research agencies have taken a brief, planned and managed the project, delivered the results and interpreted the findings. All this activity has taken place under the auspices of a specialist client team (see page 32). This has meant that technical research competencies have become the primary criteria on which success is judged. Moreover, the international research standard, ISO 20252 (see pages 28 and 63) sets the requirements that research agencies must meet in this area.

SLAs are commonly used within other marketing services contracts not only to provide a framework within which projects take place, but also as an important element in the rewarding, or withholding of bonus payments. If it is your company's custom to make a proportion of the fee you pay to the research agency as a bonus based on delivery, then ensuring that you have a robust SLA in place right from the start is essential.

Even if you don't pay research agencies bonuses based on delivery, a solid SLA creates a firm framework within which all aspects of the relationship between the client and the research agency are managed.

SLAs should cover all measurable aspects of the research agency's delivery of the service to the client. Every circumstance is different, and many clients will have template SLAs that they can adapt for the commissioning of market research.

ISBA has a generic SLA template which can be provided to members and which can serve as the basis for the creation of a more specific market research agreement. The ISBA template covers a number of topics, many of which we've included here along with a brief explanation as to how each relates to a market research commission.

As many research projects are small-scale and one-off, it may be seen as over-bureaucratic to speak of checklists and formal service agreements, and in some cases a cost quotation may be more suitable than a research proposal.

It is important and relevant to note here that the market research sector has for many years (going back to the 1970s) been committed to the setting of research standards and quality controls to be followed by practitioners. These standards have always been considered essential given research's close contact with individual respondents, but over time they have been expanded from a set of principles to be followed in interviewing to a broader-based quality assurance covering

all aspects of a research provider's role.

This broad quality assurance originated from the cross-industry Market Research Quality Standards Association (MRQSA), which devised a set of standards across the research discipline. This set was approved by the British Standards Institution and subsequently formed the basis for the international standard enshrined in ISO 20252 (see page 28).

The reason why this is relevant is that ISO 20252 details what should be included as a minimum in research cost proposals and in research proposals. A full copy of ISO 20252 can be downloaded (at a modest charge) from the ISO website www.iso.org. Some clients, as a point of principle, only consider suppliers that are ISO-accredited. The MRS *Research Buyer's Guide* (www.theresearchbuyersguide.com) lists which research agencies are ISO-accredited.

Those agencies that have chosen to go through the ISO accreditation process will as a minimum use the ISO while others may use this as the totality of what needs to be included within any proposal. While it is clearly necessary to state a commitment to quality standards and to define common work procedures and processes which are beneficial to clients, many research proposals need to include more to meet the client's requirements.

Agencies should always be encouraged to display creative thinking in meeting the advertiser's business needs – and clients should always look beyond the fundamentals (such as the commitment to an ISO standard) when they assess the contribution that an agency can make to their business.

Below we have laid out a series of topics to be included within an SLA (some of which cross over with ISO 20252 requirements), ending with eight Top Tips for a commissioning advertiser to consider including in an SLA.

b ISBA's marketing industry guidelines

Definition of services

The purpose here is to outline precisely what services the agency is expected to provide. These might include (this is not intended as an exhaustive list):

- the development of a strategic research plan
- summarising desk research
- reviewing and assessing the value of past research
- the creation of a questionnaire or topic guide

- research implementation (such as recruiting respondents, organising fieldwork, moderating focus groups)
- maintaining a close relationship with the client throughout all stages of the research programme
- writing a summary report
- presenting findings
- liaising with other research or marketing service providers

Outline of roles and key personnel

We have stressed throughout this Guide the importance of transparency in the way in which the research agency builds its cost proposal.

Here, the agency should outline the key roles and responsibilities of members of the team, along with the proportion of their time that will be given over to the assignment.

Any key personnel working on the business, such as a client service director with very specific and desirable skills should be named, and again the proportion of his or her time specified.

Responsibilities

This section of the SLA should outline where responsibilities lie for the different elements within the assignment.

For example, the client should take full responsibility for ensuring that:

- a thorough written brief is issued covering the objectives, thinking and direction behind the assignment (see ISBA's *Top Tips Guide to Briefing MR Agencies*, available by emailing tracid@isba.org.uk)
- the correct purchase order process is followed on time so that the project is not delayed
- agency questions are answered constructively, openly and honestly
- the agency is kept up to date on any material changes in circumstances
- key deliverables, timelines and budget are clearly communicated and understood
- appropriate executives are available to the agency throughout the assignment

For its part it is the responsibility of the agency to ensure that:

- the brand team is made aware of any problems the agency may have understanding any aspects of the brief within at latest five working days of its receipt
- the client receives a proper breakdown of costs; a scope-of-work by

person and a detailed timeline – in time for them to be discussed before the commencement of the assignment

- they respond to client questions and thinking in a constructive, open and honest fashion
- the client is kept up to date on any material changes in circumstances, including timelines and budget
- any liaison with other client suppliers is carried out efficiently and constructively
- lines of communication with the client are well maintained

Probably the most important point to make here is that in any research assignment there is only one team. The agency is part of the client team and vice versa. Everyone on the team is responsible for working together to deliver actionable business results from the assignment.

Any research assignment within which the client deliberately withholds information to try to trip the agency up, or where the agency decides to cut back on agreed allocated resources in order to improve short-term profitability, is unlikely to succeed.

Procedures

As we've said, many research projects are small-scale, and so neither agency nor client wishes to be encumbered with unnecessary processes and procedures that cost time and money and which distract from progressing with work designed to answer urgent business questions.

However, the principles behind the procedures outlined here are valuable and will lead to a more harmonious and thus efficient research relationship.

Top Tips

- A senior team from both agency and client should take responsibility for ensuring that the service level agreement is kept relevant and is adhered to.
- The client should ensure that the agency is aware of the company's planning and budgeting cycle – along with key deadlines and decision dates.
- The client should ensure that the agency is fully aware of all sign-off and approval procedures (including the issuing of purchase orders), and the timelines associated with them.
- The agency's quotations for any assignment should be fully costed and justified, with any third-party costs identified. The agency

should make timing implications clear in the proposal, including when approval is required in order to meet project deadlines and milestones.

- The agency should be encouraged to adjust any quotations in the event that the client requests extra work. It is much better that the agency is honest over the impact that any such request will have on its quoted costs as opposed to letting the client believe that it can deliver additional services at no additional cost.
- The agency should deliver as per agreed timelines, unless it has made clear (and the client has approved) reasons for any delays.
- The agency and the client should agree invoicing and payment terms (see *Typical remuneration models* on page 58).
- The client should evaluate the agency's performance honestly and openly at the end of the assignment. This should be a 360° evaluation, within which the agency should be encouraged to evaluate the client's performance as well as being evaluated itself.

8

Evaluating an agency or consultancy

<i>a</i> Evaluating the agency's performance	68
<i>b</i> Management involvement	68
<i>c</i> The team's performance	68
<i>d</i> Responsiveness and timeliness	68
<i>e</i> Meeting key targets	69
<i>f</i> Adding business value	70

a Evaluating the agency's performance

As clients' procurement teams have become more involved in the research process, the broad issue of accountability and how to define and measure success has become a requirement – as indeed it is in by far the majority of significant marketing services commissions. This in turn has led to the desire to adopt some sort of formal measure; hence service level agreements.

At the same time, if research agencies are expected to contribute more fully to addressing a client's business problems, it stands to reason that any evaluation of the agency's performance has to take place across a broader range of criteria than research competence and delivery.

b Management involvement

On major projects, or on small projects for major clients, it may be considered important and relevant for the agency's management to be involved personally in the business. It may be that the agency has made commitments in their pitch to win the business covering the involvement of senior staff.

Clients need to consider that as a very large proportion of the agency's costs is in the cost of people, the greater the involvement of management in the business, the higher the cost.

Q: *Has the agency's management engaged appropriately with the project? Have they been available if required throughout?*

c The team's performance

The team's performance should be formally evaluated at least once a year to ensure that commitments made are being delivered (on, for instance the percentage of time spent on the business by key individuals).

Agencies keep time-sheets (and if they don't they should). It is reasonable for the client to ask to see an analysis of time spent on their business. But over and above a bald analysis of hours spent, an analysis of agency team performance should cover 'softer' attributes too.

Q: *Is the chemistry between your team and the agency's as it should be? Has the team gone the extra mile to meet your needs and deliver to expectations? Did the supplier/client adhere to everything from the SLA section? Did the client team actively engage with the research team to get the most out of them?*

d Responsiveness and timeliness

It is important to monitor whether the agency delivers in a timely fashion.

Q: *Have all deadlines been met? Have problems been flagged and addressed efficiently? Were there problems within the client which resulted in timing difficulties for the research team? How can these be avoided in future?*

e Meeting key targets

The agency should have been provided with detailed targets and key-performance indicators (KPIs) to be met throughout the project.

Q: *Has the agency delivered these KPIs to target (for example, has the number of respondents to be interviewed been met)?*

f Adding business value

Throughout this Guide we have stressed the need for research agencies to deliver, and for clients to value market research as an aid to business decisions, as opposed to being seen as a box-ticking exercise. The need for this ‘insight’ should be agreed upfront with the agency.

Q: *Assuming that they have been asked to do so, has the agency delivered real business insights from the research results (that is, over and above the bald presentation of the results)?*

Many of the headings above need input from the broad team at the client and will of course need tailoring to each client’s needs. A formal and regular assessment of the agency’s performance is desirable – both for the agency and for the client – and if such an assessment is linked both to an SLA and even to a bonus scheme, as a part of the agency’s remuneration, then the assessment becomes both desirable and business-relevant.

As stated above, upfront clarity is essential. There is no point imposing a service level agreement on the agency without discussing the key points to be included with them first. Explaining your expectations and the measures you’re putting in place to ensure that they are met is an important contributor to a successful project and a lasting relationship.

Furthermore, even the most perfect research agency cannot be expected to deliver to expectations without a degree of cooperation and efficiency from the client. It is reasonable to give the agency the opportunity to feed back on how the relationship has worked from their perspective – by making the team’s evaluation a 360° affair, within which the client team is assessed by the agency, as well as vice versa.

9

Timings and scope of work

<i>a</i> The reality of timing plans	72
<i>b</i> What influences timings?	73
<i>c</i> Keeping to plan: The role of the advertiser v the role of the agency	74
<i>d</i> What should be included within a research scope-of-work document?	74

a The reality of timing plans

The first point to make is ‘yes – timing plans have to be real’. This is a serious point: not unnaturally, every client commissioning research wants results as a matter of urgency. Combine this with the fact that continuous improvements (in both technology and in the methods used within data collection and analytics) speed up the process of moving from brief through implementation to delivery, and the pressure to come up with answers quickly intensifies.

As with most endeavours, speed doesn’t always yield the best results. Research is, underneath it all, a business that relies on people understanding other people. It takes time to work out the most appropriate and efficient way of extracting information; it takes time to conduct interviews, or run group discussions; and it takes time to convert raw data findings into business insights.

None of this can be rushed, which is not the same as saying that research agencies either deliberately drag their feet, or that they ignore client timetables. After all, the agency’s natural desire is not to waste time – the more projects they can fit into a timescale, the more successful their business will be.

Every project should have a timing plan. The agency should produce one, and discuss it and agree it with their client. Key client dates need to be communicated, understood and accommodated (for example, it may be essential for the results from the research to be available to management for a key meeting). Potential areas where time slippages may occur should also be noted by both sides.

The timing plan should be created with an eye on the most appropriate methodology. In most instances it is better practice to decide upon the most appropriate methodology to meet your objectives, and then fit the timing around the methodology, rather than determine the method by the time available.

However, there is clearly no point proposing a technique which might be technically superior to any other being considered, if the results from the technique will not emerge until after the client’s deadline has passed. This might seem obvious, but researchers (as we have stated throughout this Guide) can sometimes be guilty of putting technical considerations ahead of pragmatic business ones.

The client should expect, and the agency should always build in, time dedicated to interpretation or ‘thinking time’. This is the time between the results emerging and final conclusions being presented. The agency will use this time to examine and interrogate the data in order to produce insights of relevance to the client’s business.

It is often the case that this thinking time is the first element to be cut from the plan when it is deemed necessary to save money, and therefore time. The notion that time given over to interpreting results and turning them into business insights is somehow time wasted, or time that can be saved, is incorrect. Economising on time allocated to this task is not a good idea, as the inevitable consequence is that the final results have less value than they might have. It is difficult to provide guidance on how much thinking time should be built in, as this depends so much on the complexity of the task, whether it's a repeat of a study or a completely new project; whether the team is long-standing on the business and so on – the best we can do is alert clients to the fact that this element absolutely should be there.

It is as we have said incumbent on the agency to produce a timing plan that both is deliverable and fits the client's overall business plan and timetable. It is also up to the agency to monitor progress against this plan, and to alert the client of any delays or problems.

The responsibilities of the client need to be included in the timing plan – for example, checking and approving the draft questionnaire or discussion guide; ensuring the advertising agency responsible produces story boards etc in time for the focus groups. ISO 20252 (see pages 28 and 63) also sets out what should be included in research project schedules. The schedule must include all relevant timings and responsibilities including:

- client-supplied documents, materials and products
- client opportunities to approve data collection instruments (e.g. questionnaires, topic guides etc)
- fieldwork
- client opportunity to approve analysis specification
- output delivery for data, presentations and reports

ISO 20252 requires research agencies to communicate to the client any changes to the project schedule and get these approved with the client. These types of changes must be documented.

b What influences timings?

The specifics of timings will depend upon the method being used and the sample being interviewed. As a general rule:

- Online surveys are faster than face-to-face, and as the results are entered directly into the system by the respondent they're faster to process.
- Samples drawn among large easy-to-find populations take less time

to recruit than niche or hard-to-find samples.

- Long questionnaires take longer to administer than short ones.
- Pre-coded questions take less time to administer than open-ended questions, and they take less time to process too.
- In the case of qualitative research, timing is going to depend on recruitment of the sample and the availability of both the moderator and of an appropriate venue or venues.

c Keeping to plan:

The role of the advertiser v the role of the agency

As we've said it is an important research agency role to manage the project to time. Thus it is up to the agency to monitor progress and to keep the client fully informed as to any slippage.

However, the client has to take responsibility for delivering those elements of the timing plan under his control. For example, it may be that certain elements of the project will require specific sign-off from client executives. It may also be necessary to use material from some of the client's other marketing services partners (like the advertising agency), which need to be supplied by the advertiser to the research agency.

Timing plans have to be collaborative, both in their creation and in their implementation. But only the agency has a full view of progress on a project – which is why it is incumbent on the agency to take responsibility for keeping to the plan. Slippages do occur, sometimes because of issues outside the agency's direct control. But when delays do occur, for whatever reason, it is important that the agency informs the client in time for practical action to be taken.

Similarly, it is not helpful for the commissioning client to hear of delays for the first time when there is nothing that can be done either to avoid the delay or to handle the situation with internal colleagues and superiors. It is far better for the agency to admit to any problems or highlight any hold-up being caused by the client as early as possible, indicating the consequences of any delays.

Clients and suppliers need to list all contacts briefed on the project to ensure that decisions can be made on time.

d What should be included in a research scope-of-work document?

This section should be considered alongside ISBA's Top Tips Guide to Briefing MR Agencies available by emailing tracid@isba.org.uk

There is no such thing as an all purpose scope-of-work (SOW) tem-

plate suitable for each and every project. SOWs do of course vary by task and by client. Many clients have their own template, and will no doubt adapt the basic model to suit specific tasks and contracts.

Here we aim to propose some broad headings which will we hope be helpful in the construction of a research SOW. A research SOW needs to cover the following areas.

Who?

- Which agency or division is being contracted for this work?
- Who are the other relevant suppliers working on this project, with whom the research agency will be expected to cooperate?
- Who is the key contact at the client?
- Are there particular 'must haves' for the agency team to work on the business? (For example: specialist skills, or some experience of your business.)
- Who is responsible for finding the sample for the research? Will the client provide this from a database of customers, or will the supplier be responsible for finding suitable respondents?

What?

- What is the broad scope of the research being commissioned?
- Are there other research projects, either existing or being planned, that will impact or inform the scope of this project?

When?

- When will the project commence?
- When will it end?
- Are there particular milestones along the way, and if so what and when?
- Is it intended to repeat this project – or is there the possibility it will be repeated?

Where?

- What is the geographic scope of this project?
- Is there a desire, or potential desire, to repeat the project elsewhere?

Why?

- The research brief will cover the technical aspects of the task, but there is an opportunity here to summarise the background to the project, the background to the company and company procedures that must be adhered to.

Costs

The research brief will provide the agency with budget details, or will ask them for proposals and recommendations. The SOW can detail:

- overall budgets, charging and billing procedures
- rules and limitations on what can and cannot be charged for
- travel and incidental expense policies

Deliverables

Once again, the brief will go into more detail, but the SOW should outline:

- whether interim outputs are required along the way throughout the project
- what is expected from the agency as a final output, and in which format
- by when

It is not unusual for SOWs to be prepared as a key element within a pitching or request-for-proposal process, and then to be refined following discussions with and contributions from participating agencies. The final SOW is then used to inform the project.

There are also obvious areas of overlap with the contract between research agency and client, and with the more detailed research brief. The SOW should be both less detailed over research approaches and expected deliverables than the brief, and more explicit in terms of what is expected from the agency than the legal contract.

The SOW should be clear of jargon. Asking a research supplier to deliver something to you in a language that is unique to your company or your sector will lead to misunderstandings and at worst to poor delivery. Being clear right from the start will avoid the agency having to ask you what such and such a term means or, even worse, guessing what it means rather than asking out of embarrassment. By the time you've both realised that one party doesn't understand the other it can be expensive to correct or to realign.

Finally and in summary, the SOW should tell the agency exactly what it is you wish to buy, as opposed to what you believe the agency wants to sell. Not producing a SOW, or producing an inexact, incomplete or vague document, can lead the agency towards producing work that is a loose translation of what they assume you need, as opposed to satisfying your specific and precise requirements.

Glossary

Market research is like many industries bedevilled by jargon.

Fortunately it is also an industry with several organisations serving the industry by producing jargon-busting glossaries of terms.

The list below comes from MRS and can be found at www.mrs.org.uk. We are grateful to MRS for their permission to reproduce it here. We've chosen this glossary as it is compact enough to be of practical value to non-researchers, and complete enough to cover most needs and eventualities.

More lists are available online from other organisations at the following addresses:

www.aqr.org.uk

www.marketresearchterms.com

www.marketresearchworld.net

www.esomar.org

agency/consultancy any individual, organisation, department or division, including those belonging to the same organisation as the client, responsible for or acting as a supplier on all or part of a research project

CAPI (computer-assisted personal interviewing) is conducted face-to-face, usually employing laptop computers. The interviewer is prompted with the question by the computer and the appropriate response codes are keyed in directly according to the respondent's answers. Routing procedures use these codes to determine which question appears next. Since the data is entered directly into the computer, analyses can be produced quickly

CATI (computer-assisted telephone interviewing), unlike CAPI, is conducted over the telephone rather than face-to-face

CAWI (computer assisted web interviewing), unlike CAPI, is conducted over the internet rather than face-to-face

client any individual, organisation, department or division, including those belonging to the same organisation as the research agency, responsible for commissioning or who agrees to subscribe to a market research project

coding the process of allocating codes to responses collected during fieldwork facilitating analysis of data

continuous research a survey conducted regularly and frequently among parallel samples within the same population or a survey in which the interviews are spread over a long period of time

depth interview one of a variety of data collection techniques, but mainly qualitative research (*q.v.*) undertaken with individual respondents rather than groups

desk research the collation of existing research results and data from published secondary sources for a specific, often unrelated project

fieldwork the live collection of primary data from external sources by means of surveys, observation and experiment

group discussion/focus group a number of respondents gathered together to generate ideas through the discussion of, and reaction to, specific stimuli. Under the steerage of a moderator, focus groups are often used in exploratory work or when the subject matter involves social activities, habits and status

hall test test of a group of respondents recruited to attend a fixed location, often a large room or hall, where they respond (usually as individuals) to stimuli

interview contact with a respondent, or group of respondents, in

order to obtain information for a research project

modelling/simulation the application of specific assumptions to a set of variable factors and the relationships which exist between them. Used to experiment with 'what if' scenarios, models may be mathematical, graphical or purely verbal

multivariate analysis range of analysis techniques that can examine quantitative data in more depth than can usually be obtained from a basic cross-analysis of the data by, for example, age, sex and social grade. The essence of this range of approaches is that the information is analysed in a way that permits patterns to emerge from within the data itself – i.e. based on the responses of the respondents, rather than being imposed in advance, perhaps incorrectly or simplistically, by the researcher

mystery shopping the collection of information from retail outlets, showrooms etc, by people posing as ordinary members of the public

observation a non-verbal means of obtaining primary data as an alternative or complement to questioning

omnibus survey a survey covering a number of topics, usually for different clients. The samples tend to be nationally representative and composed of types of people for which there is a general demand. Clients are charged by the market research agency according to the questionnaire space or the number of questions required

panel a permanent representative sample maintained by a market research agency from which information is obtained on more than one occasion either for continuous research or for ad-hoc projects

postal research the collection of primary data using a self-completion questionnaire or diary distributed or returned by post

qualitative research a body of research techniques which seeks insights through loosely structured, mainly verbal data rather than measurements. Analysis is interpretative, subjective, impressionistic and diagnostic

quantitative research research which seeks to make measurements as distinct from qualitative research

respondent an individual or organisation from whom information is sought, directly or indirectly, which could, in whole or in part, form the results of a research project

sample a part or subset of a population taken to be representative of the population as a whole for the investigative purposes of research

semiotics a form of social description and analysis which, used in research, puts particular emphasis on an understanding and exploration of the cultural context in which the work is taking place.

Advertising and other images (including overt and implied symbolism), language, social assumptions, media content and style, packaging design etc are evaluated since they provide the cultural framework within which, for example, purchasing patterns develop and can be influenced

social grade the socio-economic classification system used by the National Readership Survey (NRS) and generally for market research in the UK consists of six social grades: A, B, C1, C2, D and E. The MRS publication *Occupation Groupings: A Job Dictionary* can be used to determine the social grade of respondents

survey the systematic collection, analysis and interpretation of information about some aspect of study. In market research the term is applied particularly to the collection of information by means of sampling and interviews with the selected individuals

tabulation putting data collected during research into tables. Cross-tabulation involves a two-dimensional table using answers to two of the questions included in a survey

viewing facility premises used for conducting market research, particularly group discussions. Rooms have observation suites where the client can observe the proceedings undetected by the respondents either by video link or through a two-way mirror

First published 2011

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Published by

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Langham House 1B Portland Place London WC1B 1PN

and MRS

15 Northburgh Street London EC1V 0JR

Acknowledgements to Brian Jacobs and Louise Cretton

Brian Jacobs & Associates

www.bjanda.com

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British Library Cataloguing in Publication Data available on request

ISBN 978-0-906117-35-4