



Still on the **road to success**

More exhibitors and consistently high visitor numbers – the **Research & Results 2011** trade show has reinforced its position as the leading event in the industry. Making contacts and obtaining information about trends are still the most important motives for the visit. Thematically, the focus in this year was in particular on this keyword: social media.

The topic is stirring businesses and, of course, the market research industry: So what is social media all about? How can social networks be exploited for one's own purpose? If you were looking for answers to these questions at this year's Research & Results, you were not disappointed. The workshops made it clear: social networks are no longer a sideshow. Globalpark, Research Now, YouGovPsychonomics, Q | Agentur für Forschung and Panelbiz – the list of companies that had social media on their agenda was long.

And the response from the visitors was just as impressive. For example, trade show visitors were driven in crowds to the presentation by Marc Smaluhn, managing director of the online specialist Re-

search Now, who kicked off the presentation with the casual question "Do they think differently?" Smaluhn then talked about surveys conducted in the social media setting and things that should be kept in mind. And considering the limited experience in this area, it is obvious that there is still a lot to talk about. One thing is certain, according to the online expert's conclusion: members of social networks represent a "substantial" and "growing" part of the world population. "Facebook alone", Smaluhn emphasised, "has more members than the online research industry has available through double-opt-in-panels." However, social media members are not so easy to inspire for surveys. "Members of social media networks are less inclined to join an online panel and participate in surveys relatively rarely", according to Smaluhn. The question of whether there were indeed significant differences between survey participants from social media and panellists was answered with a "Yes" by the online expert. Panel members, for example, have a better education according to Research Now. Participants in social media, on the other hand, belong to the early users of new technology and tend to buy more high-tech devices. According to Smaluhn, the fact that social media participants differ from panel participants offers the possibility to be more "integrative", but also demands "consistent" data: "With comparative research the minimum difference can still be determined in order to define the maximum blending rate."



Research Now workshop with the topic Social Media:
 Marc Smaluhn asks himself
 "Do they think differently?"

TNS top management at the Research & Results (from left):
 Martin Kögel, Peter Braun, Andreas Kösters, Hartmut Scheffler and their colleagues from tns info research austria: Fritz Alexander and Erich Werndl

The role of social networks in the market research industry

It is certainly not easy to use social networks for market research purposes, but there is also no way around the topic. "When in 2009 Facebook announced it would be offering its 150 million users of that time for market research purposes, the announcement appeared to be no more than a side note", the Berlin professor Holger Lütters pointed out when he, together with the head of the company Panelbiz, Ansgar Gerling, presented the results of a study that compared the survey recruitment through social networks and online panels. For Lütters, Professor of International Marketing at the University of Applied Sciences, the question of what role Facebook can play in market research is elementary: "The first studies conducted last year by students of the University of Applied Sciences revealed overwhelming response rates." Within a few days, according to the marketing expert, the students had succeeded in generating "several thousand full interviews" through personal networks. "For professional panel providers this is nothing less than an existential concern. Will they as market participants in the opinion research industry become obsolete in the future?", asked Lütters.

The answer: Not in the foreseeable future. For the recruiting success that the students were able to achieve in their studies was not realised in the study conducted together with Panelbiz. "Overall, only a fraction of the respondents could be recruited through social media in the studies," concluded Lütters. Furthermore, the effort per successful participant recruitment was "considerably higher" for the organisation team than in panel surveys or newsletters. "The personal relationships that are actively maintained by the students appear to trigger a significantly greater motivation to participate than the commercial cultivation of a provider's website does", concluded the professor. However, he recommended businesses and market researchers to keep an eye on the topic.

More international than ever

Uncertainty, pessimism, doubt – the emotions that social media often evoke could not be felt at the Research & Results 2011. With 147 exhibitors from 17 countries, this year's industry gathering had more international participants than ever before. The keyword multi-nationality also played an important role for domestic companies such as Produkt+Markt from Wallenhorst near Osnabrück. But we are



The Produkt+Markt booth at the Research & Results 2011:
 Since the beginning of the year, the company is a member of the WIN/GIA network

not referring to international studies, which have been common practice at Produkt+Markt for a long time. Since the beginning of this year, the company from Wallenhorst is a full member of the WIN/GIA network, which includes 66 opinion research companies from around the world. Besides the “very lively exchange with other members and the development of new products,” says Managing Director Heiner Junker, Produkt+Markt also participates in some of the network’s work groups. The fact that social media are also on the agenda is no surprise. Produkt+Markt thus contributes to the study Global Trend Tracker on Social Media, which analyses current social media trends.

according to the findings of the self-conducted test, but also on the dramaturgy of the questionnaire. “There should be entertainment”, recommends Gräf. Since Facebook users are used to being constantly presented with something new, the Globalpark team was also required to provide regular stimuli to encourage the participants to share their

From South America to Russia



Here the established German market research institutions, such as GfK, TNS Infratest, Infas or Interrogare, who are among the regular exhibitors at the Research & Results trade show. And here the newcomers, of which this year more and more made their way to Munich from far away countries. Amongst the new exhibitors were, for example, D’Well (India), Encuesta (Brazil) and Tochka Rosta (Russia). And the debutants certainly had no reason to complain about a lack of interest. Encuesta director Alejandro Gonzalez considered the morning of the second trade show day “crazy”. The Brazilians could barely handle the number of interested visitors at their booth. The appearance at the 2011 Research & Results was a test, according to Gonzalez. But given the “great success”, the Brazilians definitely intend to participate again next year – with a bigger booth. Roman Shalimov, market research director at Tochka Rosta in Moscow was also “very satisfied” with the response from the trade show. And that despite the fact that the booth was still improvable in terms of size and design. The appearance of the booth was “a bit boring”, Shalimov admitted self-critically. Until next year, the Russian market research expert hopes to come up with something special.



Exhibitor newcomers from abroad: Tochka Rosta (Russia), Encuesta (Brasil) and D’Well (India) (from left)

But while some were still pondering and putting things in perspective, others appeared to be already quite convinced at this year’s Research & Results: “Market research must also take place in social networks,” urged Lorenz Gräf, founder and board member of the Cologne online specialist Globalpark. How this can be implemented concretely was tested by Globalpark on its own Facebook page in autumn. The experience gained from this endeavour was presented by Gräf on the first trade show day right at the beginning of the workshop series. “What can be expected from research on Facebook?” was the title of the workshop, which was filled to the very last seat. The answer of the Cologne online expert: If a survey adapts to the medium, the response is indeed quite promising. “The rules for a sound approach must be observed”, according to Gräf. And: “Incentives are no guarantee for participation.” It is also important that the survey is recognisable as such.

To make Facebook users aware of the Globalpark page, the Cologne online specialist had designed an advertisement. “Survey: How safe is Facebook?” was the title of the advertisement. The accompanying text read: “What would need to happen for you to leave Facebook? Tell us your opinion.” Facebook users who responded to the ad found the actual survey on the front page of the Globalpark website. “We hear everywhere that there are many problems concerning user privacy with Facebook. Have you ever thought about leaving Facebook for that reason? The users then had the choice between “Yes”, “No” and “Do not know”.

Whether users respond to and participate in the survey depends not only on the layout,

views – for example with questions like “If Facebook were fee-based, how much would you be willing to pay?”. The result of the test initiated by Globalpark: 817 people started the survey, of which nearly 34 per cent completed the whole survey – and without incentives.

The conclusion of the Globalpark team on market research on Facebook: Fans can be systematically approached via the social network. Just like on Facebook, the survey also takes the form of a conversation and the willingness to participate in a conversation is high – provided the rules for a sound approach are taken into account.

Speaking of approach: As in previous years, the visitors to the 2011 Research & Results trade show had nothing to complain as far as communication was concerned.

The registration process at the trade show, the online registration, the trade show catalogue and the information provided at the trade show were consistently perceived positively to very positively by the visitors interviewed by Foerster & Thelen. Praise was also given to the wide range of exhibitors and topics as a whole. With a satisfaction rate of over 80%, the overall satisfaction of the visitors was high according to the trade show organisers – just like in the previous year. Surprisingly, this cannot be said about social networks.

The influence of social media on brands

“Social media are on everyone’s lips, but are they also in everyone’s heart?” was the question with which the YouGov director Holger Geißler kicked off his workshop (topic: “With friends like these, who needs enemies? – The impact of social media on brand perception”). YouGov’s answer based on its brand index: The social networks Xing, StudiVZ and Facebook tend to have rather negative images amongst the population. What is interesting is that Facebook, the leading social network, is not even perceived overly well by young people (up to 30 years) and its image is rated very diversely. According to the YouGov analysis, Facebook “is more polarising, even within this target group, than other online giants such as eBay, Google or Amazon”.

All the more interesting the question therefore what effect social media have on brands and whether, from a market researcher’s perspective, consumer surveys are at all of any use in today’s age of so-

cial media. Most certainly yes, was the answer. “Representative surveys cannot be replaced by scanning fan figures or user-generated content“, YouGov director Geißler made clear. The reason: “The target group of people who actively post about brands and products is too specific and distorts the picture.“ Companies can also rest easy given the YouGov findings. For the effect of many scandals and crises in social networks such as Facebook have a barely measurable effect on the image of a brand. The response to the viral campaign launched last year by Greenpeace aimed against the chocolate bar KitKat, for example, was indeed high within the social networks, the negative effect it had on the brand image of Nestlé and KitKat, however, was marginal. “Only a small percentage of users use social media to talk about brands and products,“ concluded the brand expert Geißler. In contrast, scandals and crises that catch the attention of, for example, TV broadcasters, have a significantly stronger effect on the company and brand image. A report about the courier service Hermes broadcast by the German TV channel ARD resulted in a noticeable downward kink in YouGov’s brand index – just like the headlines about the failure of Deutsche Bahn’s air conditioning systems.

The findings about social media presented at this year’s Research & Results make the following clear: It is important to follow the developments in social networks. However, the benefits Facebook & Co currently offer for the market research industry are rather limited. Maybe there will be completely new insights on this topic at the upcoming Research & Results (24/25 October 2012). ■

Facial expressions becoming measurable



Facial coding at the booth of GfK

Abundant information, competent contacts and a real innovation – this year’s booth of GfK invited visitors not only to cultivate contacts and gather information, but also to take part in a self-test. On a large TV screen, interested visitors to the booth were able to observe their own image and read what feelings were just being detected from their facial expression. “Facial coding“ is the name of the new face recognition software developed by the association GfK Verein together with the Fraunhofer Institute for Integrated Circuits (IIS) and the University of Geneva. A “huge project“, says Holger Dietrich, Head of Basic Research at GfK Verein. Since 2009, the project partners have worked on the development of the software, which will come on the market next year. “Facial coding“ is, for example, suitable for testing advertising campaigns and websites. What is often difficult to describe in words is henceforth supposed to be detected beyond doubt by the software. Is the subject surprised, angry, sad or disgusted about something? “Facial coding“ is supposed to compensate for the disadvantages of conventional survey methods: According to Dietrich, “memory problems, social desirability or rationalisation,“ will no longer be an issue with the new software.