



Research Business Report

15th Annual Predictions Issue

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Technological, Methodological, Economic & Business Changes Impacting MR



Bob Lederer
Research Business Report
Editor & Publisher

2010 was a bounce-back MR year, with resuscitated revenues, creativity by MR players and investment in our industry. It's no surprise this annual **RBR** Predictions issue has a record number of submissions. The opinions expressed in this year's 16 pages offer points of view that blew me away. We feel enormous pride in the number of esteemed industry executives so outspoken about their 2011 (and beyond) expectations. Enjoy!

Inside this Research Business Report

(A few expert insights for your consideration)

- Qualitative's significant, painful shakeout into two camps
- Buyers say DIY will grow; could become real threat to vendors
- Set-top box TV viewing data will improve media planning
- Shortening questionnaires will not prove to be the answer
- Online games will be part of discrete choice analysis MR
- Marketing: enrollment, opt-in passé; "connect" by friending
- Future of MRDs: consultants, polymaths and specialists
- Animation incorporated into research presentations
- Quant researchers will return to use of telephone research
- Notable jump in international studies by Asian-based MR
- Large vendor competition will exert downward pricing pressure

Susan Whiting Vice Chair, *The Nielsen Company*

(New York, NY): Broadly speaking, MR in 2011 will continue to evolve around the key themes of globalization, innovation, connectivity and diversity. The industry has an opportunity to bring the tools that have worked so well in the U.S. and Europe to where economic growth exists: the BRIC countries, Asia and Latin America. By 2020, more than half of the world's population will be middle class—70 million more people every year—carrying enormous implications for advertisers. BRIC countries will represent 50% of global consumption; China alone will account for 30% of that worldwide consumption.



The industry has to innovate to keep pace with emerging market trends and the increasingly diverse, demanding and connected consumer. Social and mobile media will play larger roles in our research methods, particularly overseas, where these are gaining widespread popularity and will feature prominently in marketing in developing countries.

A host of MR products and services in the marketplace need to be better integrated to more accurately connect how people consume media, what they are watching and what they are actually buying. TV remains the screen of choice in the U.S., but additional screens only add to consumption, a trend we expect to continue. DVRs will continue to surge, as will Internet video viewing. Large-scale cord-cutting will not yet materialize.

Smartphones will become the majority in the U.S. in 2011, with the Android OS continuing to surge. But if iPhones are offered on another network, expect that OS to continue to dominate while Blackberry continues to lose share.

In the U.S., there's so much more to MR than determining what the 18-24s are interested in. We need to dig deeper and gain meaningful insight about differences with-

in groups. Today's Baby Boomers may not be the first to embrace new trends, but they adapt and they have spending power. Expect marketers to finally "re-discover" this group. Women continue to play an increasingly important role in all aspects of life, including shopping for electronics and other goods traditionally associated with men—who are playing a bigger role at the grocery store.