

Emerging markets jet ahead in the journey through the cloud



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Editorial



A lot has been written about cloud computing, and one common theme has been the high level of uncertainty which consumers and business users have felt when it comes to cloud technologies.

For this edition of TechTalk, GfK conducted a B2B survey around cloud computing in six markets - The US, UK, Germany, Brazil, China and India, looking at drivers and barriers from a decision maker's perspective. Surprisingly, we found that companies in the emerging markets we surveyed had no fear when it came to venturing into the cloud. We also speak to an industry expert from Google, to find out what we can learn from an established cloud provider.

From the consumer side, we ask how the youth market is navigating the world and which technologies and devices are being adopted in the process. Their desire to create and

co-create leads to new opportunities, which brings new challenges for the market research industry. And could Co-creation in the cloud be the next consequent step for online communities?

As always, if you have any comments or would like additional information about GfK, including anything relating to the articles covered in this edition, then please do get in touch.

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Emerging markets jet ahead in the journey through the cloud

By Dirk Moersdorf

The cloud computing market is on the fast track from niche to mass. But there are still hurdles for the providers of cloud solutions to overcome, before they finally convince decision makers and gain the trust of businesses. GfK interviewed 1,800 IT decision makers across six countries on their awareness of cloud solutions, perception of benefits in relation to their own business needs, and trust in the right partner, to understand how B2B decision makers in key markets are assessing cloud solutions for their companies.

Cloud adoption: Emerging and established markets

The world of cloud computing adoption is currently split in two widely different hemispheres. In the emerging markets we surveyed, Brazil, China and India, a broad range of cloud solutions have already been widely accepted by businesses. In particular, the penetration rate for cloud-based infrastructure provision is comparatively high. Both the degree of interest in and level of penetration are largely independent of company size. These markets show a very strong intention to implement cloud services within the next two years, pointing to considerable further growth in all categories of cloud computing.

However, the picture is completely different in the established markets we surveyed; The US, UK and Germany. Penetration of cloud services here is significantly lower, compared to the emerging markets. In the established markets, smaller companies have shown little interest in adopting cloud services. However, the relevance of cloud solutions becomes higher the larger the company

(though this depends on the type of application). In these markets, companies' plans also indicate a rapid growth in all segments over the coming years, with one exception: small companies in Germany. This is a surprising exception, as the benefits of web-based solutions for small businesses are obvious, given the high share of employees who work out of office, and that resources for maintenance and administration of IT are scarce.

Data security: a concern or a driver for adoption?

The findings show that potential buyers understand the idea of cloud computing very well (see figures one and two). They know it is based on offsite data storage, that it allows access to company data from everywhere and independent of the device, and that it offers a lot of flexibility in terms of IT infrastructure and application usage. Many are even aware of technical basics like virtualization and multi-server concepts.

But decision makers' perceptions differ tremendously when it comes to security and cost effectiveness. There are still

major concerns in Europe and the US about data security and other risks in the cloud, as well as doubts about cost-effectiveness. In the emerging markets, however - be it Asia or Latam - the risks of storing in-house are obviously seen as much higher than in established markets. Cloud solutions are therefore perceived as offering greater security of access, as well as being more cost-effective and also more flexible than in-house solutions.

In a surprising twist, the research found that data security - by which we mean the protection of data against unauthorized access or data theft, was cited as one of the top three drivers of cloud computing interest. So data security, which is listed by the established markets as the main barrier to adopting outsourced cloud solutions, is also perceived as one of the main advantages or drivers of cloud services, in some companies' minds. This apparent dichotomy gives clear indication that providers of cloud solutions have opportunity to educate and convince the Western world about this critical issue.

FIGURE ONE: EMERGING MARKETS - INDIA, BRAZIL & CHINA



FIGURE TWO: ESTABLISHED MARKETS - US, UK & GERMANY



The perceived benefits of cloud

Apart from data security and having access from everywhere, there are a wide range of reasons given for interest in using cloud solutions (see infographic, figure three),

One of the most interesting findings is that businesses in the emerging markets rate the competitive impact of cloud much more than their colleagues in Europe and the US. This means that, when they look beyond the mere technical, infrastructure-related benefits of cloud solutions, and transform these into business advantages, decision makers in Brazil, China, and India take a more strategic view than those in the other countries.

For example, decision makers in Brazil (16%) and India (19%) emphasize the global reach of business as a main driver of usage, while, in China, decision makers are more focused on the potential it delivers for rapid growth (22%) and the ability to concentrate on core business (17%).

Barriers are not necessarily show-stoppers

Even though data security is one of the top-3 barriers to adoption in all countries, it is really only in Germany where this could be considered as a showstopper. Everywhere else, this is a challenge for the cloud providers to overcome with education and strong performance.

Likewise, the perceived cost of using cloud services is also ubiquitous, with many

companies naming cost as a significant barrier to using cloud solutions. Over a third of all IT decision makers interviewed said the costs of migration was a top-three barrier, while two out of five named the costs of the services themselves.

Despite it seeming like common sense that the usage of cloud services could be a way to reduce the total cost of ownership of a company's IT, cost advantages are not instinctively seen as a prominent benefit of cloud solutions. So, at present, this area is obviously perceived more as a barrier to growth than as a real door-opener. From our point of view, further success of cloud take-up also depends on other challenges. Although not as regularly mentioned as a top-3 concern, potential clients' fear of downtime, and of being too dependent on a supplier, are significant barriers. Obviously, it is threatening for companies to lay their whole IT infrastructure in the hands of a single provider, and they feel that they are locked in once they make a decision.

This understanding – that companies of all sizes and in all countries surveyed have their own distinct views of why cloud solutions make sense or not for their business - offers a huge potential for cloud providers to target the different audiences and segments with tailored services and communication.

Do companies really feel a need for IT change?

In the established Western markets we surveyed, companies' concerns about their IT infrastructures are not significant, so, there seems no real pressure to adopt cloud-based infrastructures. Nothing bothers these companies other than the topic of security - so getting that right, and communicating it effectively, is key to driving adoption in these markets.

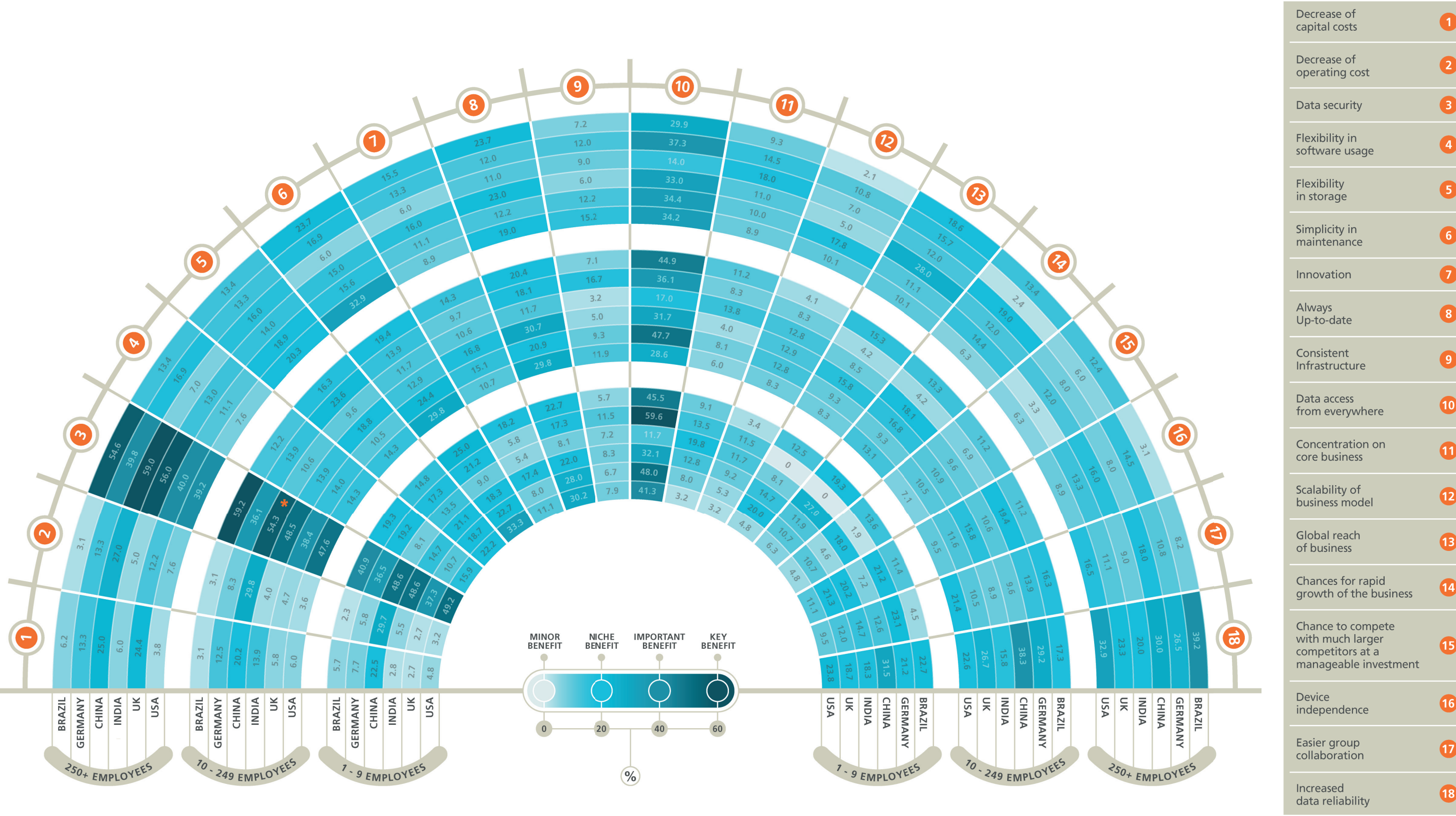
The perceived need for change is much stronger in the emerging markets and there might be a couple of reasons behind this.

One could argue that in the recent financial crisis, Western companies focused on improving their IT infrastructure which enabled them to pull ahead of the emerging markets. Consequently, current IT infrastructures in the emerging markets might not be entirely competitive; in this situation, cloud computing offers a chance for them to catch up.

Another possible factor could be that, like their economies, the companies in the emerging markets are growing faster than in the US and Europe, and this rapid growth requires the flexibility of cloud computing to accommodate their expanding requirements.

This finding might reveal a certain amount of complacency in traditional economies, compared to decision makers

How perceived benefits of Cloud Computing vary by country and company size



HOW TO READ:

54.3%* of companies in China with 10-249 employees regard data security as a Top-3 benefit of Cloud Computing

Survey among IT decision makers in Brazil, China, Germany, India, UK, US; n=1,800 interviews
Question that this graphic is based on: "Which three of the following benefits of Cloud Computing would you say drive the interest of your company in Cloud Computing most?"

in the emerging markets we surveyed. Nonetheless, demand is tremendous, and providers are more than keen on earning their piece of the pie.

Selecting the right partner for a cloud solution

At the first glance, it looks as though the market is dominated by only four big suppliers: Amazon, Apple, Google, and Microsoft. These four cloud providers are known across all six countries surveyed.

However, there are differences by country. In China and India, other players like IBM and Oracle are top-of-mind, as well, while Brazilian decision makers think only of Google and Microsoft.

But awareness only is not a guarantee for being selected as a partner. Companies have to trust cloud providers, to let them store and process their data. In general, decision makers in the three emerging markets are a lot more trustful towards global providers than their contemporaries in the established markets – providing another indication as to why cloud solutions have already taken off in the emerging markets, while businesses in Europe and the US are a little more hesitant.

Overall, Microsoft commands most trust as a cloud solution provider, with two-thirds (66%) naming them as a trusted brand, followed very close behind by IBM with 63% and Google with 58%. The leading network operators, e.g. British Telecom, AT&T or China Telecom, face a considerable gap in trust compared to these top three.

There is one big exception: German decision makers have their very own point of view when it comes to brand trust, and would rather partner with Deutsche Telekom or IBM on cloud solutions than Microsoft. They are also much more hesitant to trust Google. Across the board in all surveyed countries, Oracle and particularly Amazon fail to inspire as much confidence as their most important competitors.

Although some brands may have a head start due to existing client base etc, the opportunity is available for all global providers and network operators to win their share of market in the cloud revolution. In order to improve confidence in their brand, it is important for all providers to work on performance and communication. The GfK findings show that current perceptions held by IT decision makers on important dimensions, like security, reliability, and fail-safe services, are spread across the range, suggesting that there is room for profiling still, through educating the target audiences.

Overall, a provider of B2B cloud solutions must be regarded as secure and reliable, which is no surprise at all. However, it will be the suppliers that manage to *communicate* the security of their approach, and provide transparency and control to their clients, who will surely come out on top. As well as these elements, all countries surveyed indicated that the provision of fail-safe services, and the power to integrate apps and platforms, are very important business requirements too.

Who to build trust with?

When it comes to whom to target within a company, there is again a clear difference between the western markets and emerging markets, as well as between larger and smaller companies.

In established markets, the majority of businesses with 250 or more employees assign decision making on implementation of cloud computing to top management. In contrast, there is an obvious tendency in India, China and Brazil, that companies’ IT experts have a stronger influence on decisions regarding radical changes of infrastructures.

For suppliers this means that client decision-making will most likely take longer in the Western markets than in Brazil, China, and India, and – most importantly – that their client communications must be customized to resonate with the specific requirements of the relevant key decision makers.

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Tailor your offer for identified sub-groups

Suppliers should tailor their propositions to relevant sub-groups in the market.

Here are three examples:

- Example #1: There are a significant amount of medium sized businesses in India, for whom it is very important to have their infrastructure up-to-date. For these companies, it would make sense to create an offer that focuses on regular updates and state-of-the-art hardware and software, and communicate these key characteristics to the target group.
- Example #2: For many US enterprises of all sizes, simplicity in usage of services is particularly important. Therefore it is recommended that product development for the US market focuses on services that are very easy to use, and marketing should re-enforces this message.
- Example #3: Chinese small enterprises emphasize the chance to grow rapidly as one of their main drivers for using cloud computing. Solutions for this target group should highlight scalable services that grow with the company. Marketing communication should therefore focus on these small companies’ ambition to be extremely successful and fast-growing, and describe the contribution that cloud computing services can make to that.

IaaS, PaaS, SaaS - which categories of cloud computing show most promise?

One would expect infrastructure services to be in the pole position for further market growth, as they are relatively easy to understand and almost every company needs them. This is true in many cases, but the picture is not unilateral. In four out of the six countries, IaaS (Infrastructure as a Service) shows the largest potential market when it comes to users and intenders, however, the margin over the other services is not particularly high. In China and the US, the potential for Software as a Service (SaaS) is even slightly higher.

Also, given the fact that only a relatively small percentage of companies have any need of platform services for application development, PaaS (Platform as a Service) has almost equally high acceptance as for the other services – making it something of a hidden champion.

What’s next?

From our point of view, there is no doubt that the triumphant success of cloud computing will continue, especially in the emerging markets. In these markets, there are a wide range of concerns that must be addressed by marketing communications – but these are unlikely to significantly slow down the adoption of cloud computing. In order to actively accelerate cloud growth, providers of cloud solutions need to be open towards migrating their clients’ infrastructure to the cloud if this is the best solution, even though it may risk cannibalizing traditional revenues.

Further reading:
An interview with Google shows how one of the most important players in this area copes with the cloud offering, see the next story.

Sources
GfK interviewed 1,800 IT decision makers in 6 countries (Brazil, China, Germany, India, UK, US) and 3 company sizes (1-9 employees, 10-249 employees, 250 and more employees). June 2011.



CLOUD COMPUTING FOR BUSINESSES - AN INDUSTRY PERSPECTIVE

Interview with Google's Petra Sonnenberg

Although the real breakthrough of cloud computing for businesses has just started, Google has been promoting the benefits of cloud computing for more than ten years now. With its abundance of web based services from Gmail to Google Apps, what can technology companies and cloud enthusiasts learn from their experience so far? To help us explore this, TechTalk spoke to Petra Sonnenberg, Enterprise Industry Leader at Google.

GfK: Petra Sonnenberg, what is your general assessment of the market right now? Where do business clients currently stand on cloud computing?

Petra Sonnenberg: As far as Google is concerned, the figures show that our cloud computing product Google apps already has more than three million corporate clients. This figure is growing at a rate of 3,000 a day, and so we are seeing very strong growth in this area.

GfK: Where is the main growth potential in your view?

Petra Sonnenberg: Principally in the US and Asia. In Europe, I would mention the UK, Belgium, Holland, France and Scandinavia, where the market for cloud computing is gaining momentum most quickly.

GfK: By your definition, what characterizes a real cloud solution?

Petra Sonnenberg: The main feature is to create synergies and generate cost savings for the customer via shared infrastructure that leverages huge economies of scale. This does not work with normal outsourcing solutions, where the data are outsourced from your own data center to the data center of an operator, but continue to be managed there on dedicated platforms.

GfK: Do you think internet providers and network operators are already sufficiently advanced that they have the available infrastructures to exploit such synergies?

Petra Sonnenberg: I wouldn't like to judge whether the network operators are that advanced. But what I find interesting is what Vodafone, for example, is doing in Germany: they are offering our cloud solution and our cloud applications to their own clients. And the more applications clients use on the internet – in the cloud – the more bandwidth the network operators need. This benefits them and the cycle is complete.

GfK: So, you don't really see network operators as competition?

Petra Sonnenberg: As a rule, network operators don't have software-as-a-service solutions. In this respect, huge synergy effects are created through partner solutions. Another area of cooperation is mobility. Nowadays, when we talk about mobility the conversation soon turns to smartphones. And a telecommunications provider can pass cloud solutions on to its clients in combination with smartphones or other internet-capable devices.

GfK: Are there also areas where competition could arise?

Petra Sonnenberg: When we talk about infrastructure-as-a-service, there is potential for competitive situations and there are certainly some telecommunications providers who compete with traditional IaaS providers. But, as far as the issue of software-as-a-service is concerned, I ask myself: why should a carrier whose core competence does not lie in this segment offer such a solution and reinvent the wheel?

GfK: Let's stay with the provider side for a moment. How does the transition work from supplying traditional hardware and software to providing new supply models via the web? Ultimately this is a subject that does not affect you at all, but does Google sense amongst the competition that traditional infrastructure providers are having difficulty with the transition? Is that, perhaps, a competitive advantage for the new, purely cloud-based providers?

Petra Sonnenberg: Obviously, we at Google don't have the problem that we are cannibalizing an existing business through this swing to cloud computing. Our solution originated in cloud computing and we went directly to market with this service, but if a manufacturer has a traditional solution with a large customer base, it's more difficult to take this step. They have to ask, when is the right time, what are the consequences of this step and how do I protect my existing business? That's an important difference. Besides, as a "pure" cloud provider, we offer a very transparent cost model from the start. In the last four years we have added a great many new and innovative services without ever having changed the price for this solution, which remains steady at EUR 40 per user per year. Our goal is always to pass the synergies and economies of scale that we can use at Google on to our customers.

The main feature is to create synergies and generate cost savings for the customer via shared infrastructure that leverages huge economies of scale. This does not work with normal outsourcing solutions, where the data are outsourced from your own data center to the data center of an operator, but continue to be managed there on dedicated platforms.

GfK: Do you think there are any other advantages or disadvantages that you have over traditional providers and manufacturers?

Petra Sonnenberg. If we look at the customer side, there are of course very large companies who have a long history with one supplier and evolved application structures. It's a bigger step for these companies to switch to a completely different solution than for a small or medium-sized company that does not have this history. But this doesn't mean that cloud computing would be less attractive for large companies. It's not just a question of price benefits. There are a whole host of possibilities for more efficient cooperation, for example working together on one document in real time with several people and seeing exactly who makes what change in what area, or chatting with each other in different languages. I chat in German, my colleague answers in Spanish and then the translation robots on the internet translate what has been written, word for word, in real time. These are opportunities that only a real cloud application can offer.

GfK: What do you think will happen to the scores of local IT providers? What I'm getting at with this question about local providers is that traditional cloud solutions are no longer so consulting-intensive because they can be managed much more uniformly. Is there a trend towards less need for IT services and consulting?

Petra Sonnenberg. Start-up companies, for example, really have it easy; if in doubt, they can buy the solution online. Everything is highly standardized and one of our maxims at Google is to keep it very simple, which means you don't have to have done a lot of user training to be able to get up and running quickly with such a solution. However, if large companies, who often have a large number of integrated back office solutions, want to migrate to the cloud, it's still a large project. It must be ensured, for example, that all the existing email data are transferred from one system to the next, that contacts can be found and that calendar entries are correct, not forgetting the workflows and processes, which should also be retained. So there is a great deal of work, also for the IT providers.

GfK: This increased need for consulting when dealing with complex processes – do you notice this in your client structure? Are the very heavy users of cloud solutions primarily small and medium-sized companies that do not have such complex processes or are they mainly large companies that have more market knowledge and use it?

Petra Sonnenberg: As a result of the fewer structural hurdles

which we have already discussed, the service is catching on more quickly among small companies, but there are also many large companies that opt for our cloud solution. It's so wonderfully democratic, regardless of whether there are two, five, ten, a hundred or a thousand users in one company. We also have Google apps clients who have 50,000 users. Essentially, we cover the full spectrum.

GfK: What do you think are the main arguments for cloud computing from a client's point of view, besides the economies of scale and increasing mobility you have already mentioned?

Petra Sonnenberg: One of the main points is the issue of security: it is much safer for many companies to outsource data to the cloud than to store it in their own data center on laptops and USB sticks. Portable storage media, and therefore also the data saved on them, are often lost or stolen. With cloud computing, the data are no longer stored locally; they're in the cloud and so it's not so critical if a device goes missing, because you can easily access everything via the browser.

GfK: Data security is a very multifaceted issue from the point of view of companies. It's not just about data loss, but also about unauthorized access. What are the distinguishing features of a cloud solution when it comes to protection from unauthorized access?

Petra Sonnenberg: As a cloud provider, we are responsible for the data of three million corporate clients at present, and at Google we take this very seriously. Naturally, this means that we do everything possible to keep the data safe. We have the necessary infrastructure, the best security experts worldwide, comprehensive security protocols, data centers whose location even I don't know, and much more. An individual company just cannot compete with these security standards.

GfK: We have learnt that there is a great deal of faith in the emerging markets that this actually works and that large cloud providers keep this promise and can live up to their responsibility. In the traditional markets, there is still a great deal of doubt. What do you think are your chances of being able to convince even skeptical companies that important data is in safe hands in the cloud?

Petra Sonnenberg: I would compare it to online banking. There was a lot of skepticism in the beginning, but eventually it became accepted. Flying is another great example. In the fifties and sixties, the idea of boarding an airplane without a second thought and being flown from A to B with lots of other people was still

I would compare cloud computing to online banking. There was a lot of skepticism in the beginning, but eventually it became accepted. Flying is another great example. In the fifties and sixties, the idea of boarding an airplane without a second thought and being flown from A to B with lots of other people was still unimaginable.

unimaginable. We trust in the fact that well-established airlines do everything to ensure that the highest possible safety standards are maintained. Relinquishing responsibility and control is always a step that has to do with trust, with a gut feeling.

GfK: The fascinating thing is that decision-makers in Germany actually respond completely differently to everyone else. Germany has a unique status when it comes to this skepticism. Is this an attitude that you see as being very strong by global comparison?

Petra Sonnenberg: Yes, it is undoubtedly also connected with Germany's history.

GfK: So it's a cultural thing?

Petra Sonnenberg: Cultural and historical. I think both factors play a part. However, there are also more and more companies in Germany who are saying, hold on a minute, our competitors abroad are now gaining competitive advantages that we don't want to miss out on. So I think it will take a bit longer, but it's a question of when, and no longer if, our cloud solutions will catch on in a big way.

GfK: What do you think about the subject of the migration of data and solutions? Many decision-makers find it a very difficult concept and dependency on a specific cloud provider worries them.

Petra Sonnenberg: Our ambition is not to bind clients to us if they want to leave. We want to convince them in a positive way and cooperate with them in the long term. There is therefore a very clear exit strategy, and this is also openly defined. We have established a specific initiative, the Data Liberation Front, that explains exactly how clients can get their data back from our services.

GfK: This transparent description of the exit strategy leads us nicely on to another important subject: transparency. If

users wish to exploit the synergy effects you mentioned, which are available in a large number of data centers worldwide, then clients no longer know where their data is exactly. How are you combating these reservations about transparency?

Petra Sonnenberg: There is plenty of information on our websites and in our white paper, which also describe in technological terms how data is stored in various data centers. The issue of the multifaceted nature of security also entails a conflicting aspect for the provider. To maintain the subject of security as a high priority, we avoid data center tourism at Google. Granting everyone access to the centers poses its own risks. A provider has to find the right balance between what companies absolutely have to know and understand, and the trust that the provider who processes the data for the client does so with the utmost security. **GfK: To what extent is the subject of transparency at the forefront of communication? Is Google considering placing transparency more at the forefront of communication or are the prime concerns still the typical benefits such as mobility and cost savings?**

Petra Sonnenberg: All meetings conducted bilaterally between us and major clients address these issues in detail. I think it's obvious that when dealing with promotional aspects the initial focus is on cooperation and increasing efficiency. Anyway, all these issues are of course discussed and clarified before a purchasing decision is made.

GfK: Our survey shows that this dependency and lack of transparency are important barriers but that the advantages of cloud computing are already seen much more clearly in the market than we would have assumed.

Petra Sonnenberg: Is that meant as a piece of advice to us as a provider?

GfK: Our recommendation is to continue placing more emphasis on the issues of exit strategy and transparency in the medium term. What is your outlook? How do you see this issue in five years? Do you think that by then more or less every company will be using a cloud solution?

Petra Sonnenberg: I would not like to speculate on the exact time frame. But for me, it's really a question of "when" rather than "if".

GfK: Petra Sonnenberg, thank you very much for talking to us!



THE PATH TO 4G: A WALK THROUGH THE CLOUD

By Rob Barrish & Ryan Garner

Consumers are now using various connected devices to socialize, communicate and access a plethora of content and services. Smartphones have accelerated this trend and allow consumers to manage more of their personal and work lives without being restricted by location or time. Cloud based services are the next step in liberating consumers’ most loved content and service as the device is removed as a barrier to access. Network infrastructure is central to this shift to the cloud. 4G networks are the catalyst needed and security the hurdle to overcome. However, with learnings from the enterprise sector, security is not only an obstacle but can also serve as a driver for adoption.

The term “cloud” computing is used to describe applications and services hosted and run on servers connected to the internet that end users do not have to maintain or support. A number of big name technology providers are evolving their service offerings to ensure consumers can access software and media content anytime and on any device. Apple recently announced iCloud while Microsoft announced Office 365 to better compete with Google’s increasingly popular cloud based ‘Documents’ service. Data from a recent study by GfK in the US and the UK [1] shows these developments are very timely. When asked about their next home PC/laptop upgrade, 1 in 2 consumers (53% in the US and 44% in the UK) revealed that computers that are bundled

with cloud based services would become instantly attractive propositions.

The PC is only a small part of the growing number of connected devices used by consumers, which is expected to reach 22 billion within the next decade [2]. More than 60% of all internet enabled devices sold worldwide are mobile devices like smartphones, laptops or tablets [3]. With greater access to the internet and more devices being used, content stored locally will become an increasingly rare. As a result, there will be a greater need for consumers to move their data to cloud-based services. This is very much in line with what we have found in the enterprise sector:

Interest in Cloud by Age
Average Across All Content Types

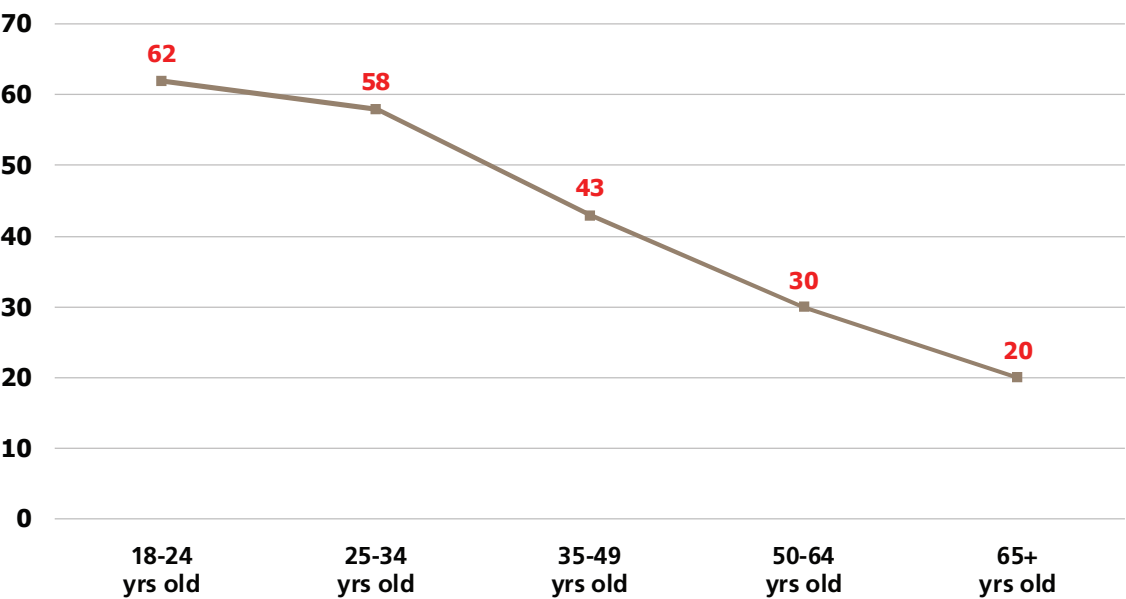


Figure one: Interest in cloud by age average across all content types

for companies, the main benefit for using cloud services is access to their data from everywhere (see our main story).

A device agnostic cloud based ecosystem

A key area for this kind of development is media content and a great example is the industry group, Digital Entertainment Content Ecosystem’s (DECE) Ultraviolet Digital Locker. This collaborative effort across several content providers, hardware manufacturers, and software developers provides more open access to video content. The DECE includes Warner Brothers, Paramount, NBC Universal, and Lionsgate, along with Microsoft, Intel, HP, Samsung, Sony, Panasonic, Netflix and Comcast. The concept is to create a digital locker that stores tokens that are proofs of purchase of DVDs, Blu-ray discs and video downloads. When a consumer buys a video online or at a store, he can watch it anywhere else, including on any mobile device or TV set without the hassle of copying his/her personal files. This kind of accessibility will only increase in importance as consumers diversify their device ownership across multiple form factors.

GfK’s research among US consumers shows the types of content consumers are most interested in storing in the cloud are photos (50%), email (49%), full length movies (49%), TV shows (47%) and work/school documents (45%). Figure one shows that the shift to the cloud is being driven by younger consumers, with older age groups showing significantly less interest in moving their data to the cloud.

While cloud based services are being developed to satisfy this kind of consumer demand, there are two key barriers to full adoption; slow or congested mobile networks and security fears.

The path to 4G network infrastructure

For this utopian vision of seamlessly integrated content across a diverse range of networked devices to be fully realized, mobile network infrastructure needs to be upgraded. The impact of the data strain on networks is huge - in the UK and the US 3G utilization rates are fast-approaching threshold levels and threatening user experiences, particularly in areas with a high smartphone density. The migration to 4G networks is expected to provide a new platform designed to cope with the increasing demand for data and cloud based services. Network carriers in the US are well under way to bringing faster 4G services to the market but in the UK and other European countries this transition will be much slower.

Long Term Evolution (LTE) 4G networks that are being rolled out by AT&T and Verizon in the US can deliver download speeds ten times faster than 3G networks. With those kinds of speeds, streaming HD movies on your smartphone would be an uninterrupted jitter-free experience. This will improve user experiences and open up new ways of consuming content while on the move. Without this kind of infrastructure, adoption of cloud based services will be slow and limited to data services that are less intensive.

Security fears

Security of data within the cloud is the biggest concern across all age groups. Marketers need to address these concerns openly when communicating the benefits of using cloud-based apps and services. There’s also an overall need for greater education about the cloud – only 9% of US internet users completely understand what is meant by the cloud - in order to move consumers from general understanding to active utilization. Consumers want to know that the content they’re storing in the cloud will still be there in the future. As consumers are giving up a level of control, they need some form of guarantee and want to align themselves with companies they trust. GfK’s research shows that 61 % of consumers surveyed said that they are concerned about the security of their content if they were to store it in the cloud. However, this fear could easily be turned on its head and become a key USP for cloud computing vendors.

Looking into the more advanced enterprise world, when it comes to cloud based services, “security” offers opportunities for adoption. Business decision makers realise that security systems run by large cloud services vendors are likely to be much more robust than their internally managed systems. Similarly, once consumers understand that the security of their content stored at home can never meet the security standards of the cloud, then security can evolve into a driver of adoption very quickly.

But security is not the only hurdle, cloud based services need to be easy to use as well. GfK’s research showed that 47% of consumers said they would never use the cloud unless they have a simple and easy way to store their content, while 39% say they are concerned about the ability to play content on different devices from the cloud. As a result, greater compatibility and accessibility to content across devices is essential and the user experience will be key to whether consumers persist with this method of storing and accessing their content. A critical area

to get right for service providers is the purchase process and ensuring that the same content purchased for one device can be accessed across multiple devices.

The content and software ecosystems have developed rapidly over the last three to four years. They are now one of the biggest drivers of smartphone choice and more recently tablet PC adoption. Consumers, particularly the young digital natives, expect their content and preferred software and services to be ‘always-on’ regardless of location or device. Those brands that can allay consumer fears around security and deliver a fast, reliable and integrated service will win the hearts and wallets of tomorrow’s consumer.

Sources

- 1) A representative study of adult internet users in in the UK and US. 1000 interviews in both the UK and US were collected in May 2011
- 2) IMS Research <http://goo.gl/G2aGY>
- 3) GfK Retail & Technology, 2010 (Data collected from over 500,000 retailers around the world)

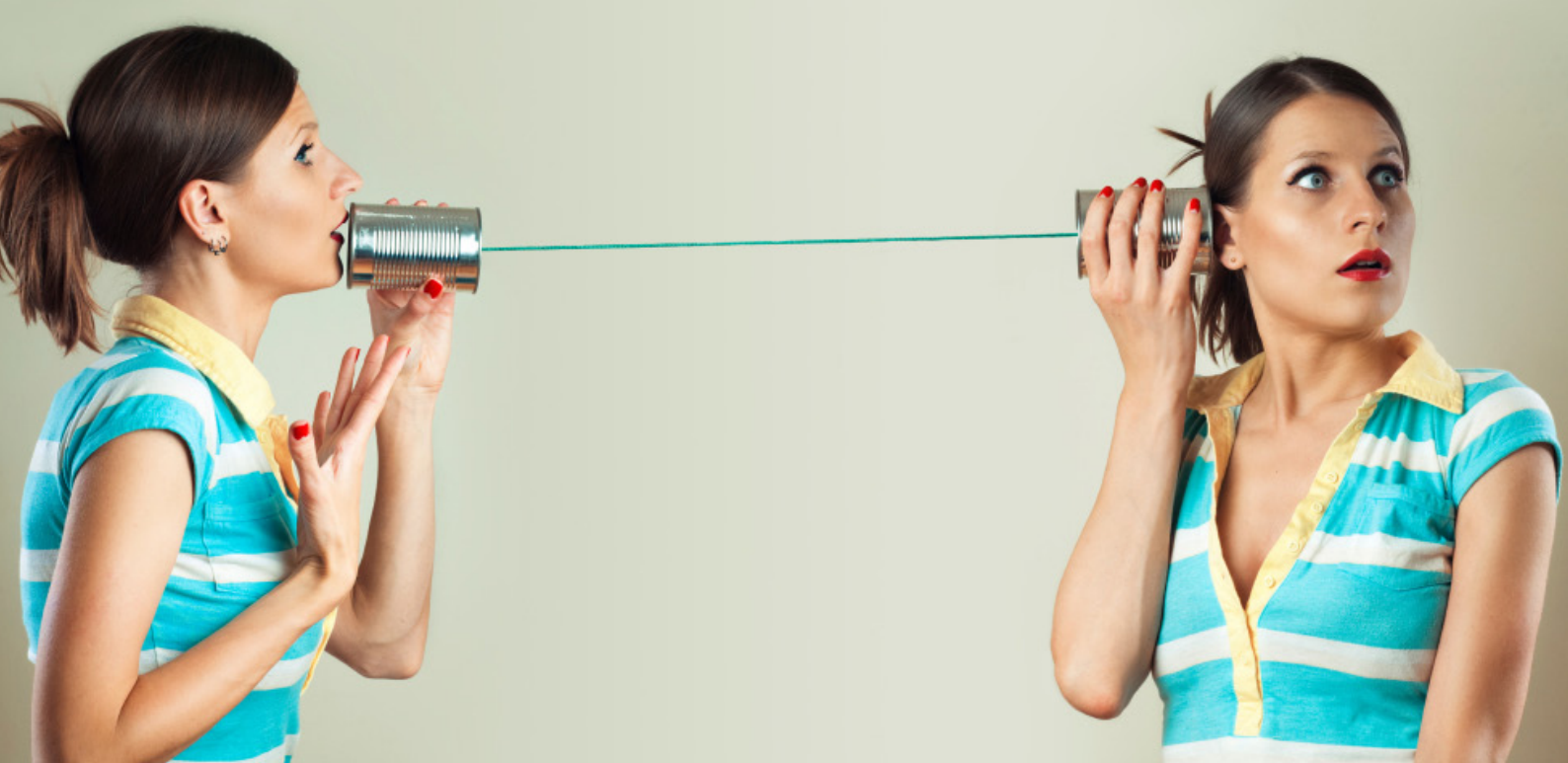
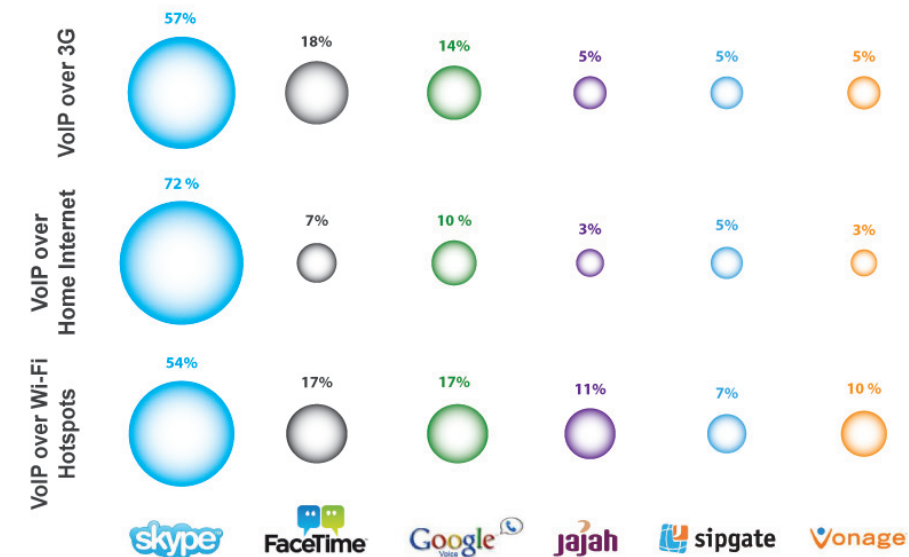


Figure one: VoIP providers used by connectivity type

VOIP IS HERE TO STAY – A JOURNEY FROM DISRUPTION TO MAINSTREAM

By Manolis Koumantaros & James Dickerson

Voice over IP (VoIP) has gained significant momentum in recent years and now has a prominent place in the mobile ecosystem, forcing mobile network providers to take a different stance towards this technology.

The changing bargaining power

While mobile voice still remains the cash cow for network carriers there are signs of stagnation. Growth is now primarily driven by data revenues and the sales of Smartphones. The need to upgrade text and voice users to Smartphones and data plan deals has shifted the balance of power amongst the forces that define the competitive landscape in the mobile sector. With the push of 4G, and advertising data applications, providers acknowledge this development clearly.

Not so long ago, major network operators in the UK considered not stocking Nokia's flagship smartphone, the N97, in a protest against the company pre-installing Skype on the device¹. However, attitudes have changed and so has the competitive rivalry. It is a reoccurring subject in TechTalk, that

consumers today are not just buying the latest handset based solely on its features and functions, but instead are buying the experience provided by the mobile ecosystem². With this change in consumer preference and with Skype appealing strongly to profitable smartphone users, network operators have bowed to the inevitable and embraced mobile VoIP (mVoip) by allowing handsets to be pre-installed with this application and also allowing Skype calls over their networks.

The allure of Skype

Moreover, Skype seems to represent the evolution of Internet calling (VoIP) as described by Morgan Stanley in their latest Internet Trends report³: "VoIP = Consumers Want to Chat (via Voice + Messaging + Video) via Wired + Wireless Internet"

Not surprisingly, this definition also reflects changing communication patterns that go beyond the standard voice+sms offering of mobile network providers. Skype, with its vast customer base (almost 700m registered users), seems to tap remarkably well into that market⁴. The key advantage here is how adaptable VoIP is to consumer trends and the agility of this technology – consider, for example, Facebook and Skype talks on potential synergies, such as Video Calling⁵ or Skype TV widgets.

Data collected by GfK Tech Talk⁶ also verifies an increased popularity for VoIP, with 43% of the UK internet population saying that they are making internet calls (VoIP) while at home or on the move, using a range of different devices.

The same research also verifies that VoIP

is a converged service and, although the vast majority (89%) of users are using their home internet connection to make calls, a large proportion are also using mVoip through mobile networks over 3G (31%) and Wi-Fi Hotspots (29%). In all cases, Skype dominates the category.

However, although the data identifies that mVoIP is growing and that some customers are switching from operator provider voice services to mobile Internet calling, it is too early to say that there is a serious incumbent displacement taking place – 1 out of 3 VoIP customers have not used the service in the past week. The threat is also minimized by the fact that VoIP quality over 3G is inferior to GSM calls.

mVoIP market is maturing

Nevertheless, there is indisputably a certain maturity in the VoIP market and big Telcos and IT companies are starting to invest in the technology before they become victims of their own markets. Consider Telefonica, for example, which recently acquired Jajah and started offering a mVoIP service in Europe⁷ or Microsoft, which recently bought Skype for a staggering \$8.2bn⁸. In addition, with the upcoming advent

of 4G (LTE/WiMax), network carriers are hoping to recoup voice revenues by offering "best in class" mVoIP (voice/chat/video) service, which also has the potential to pull increased fixed-to-mobile call substitution. However, Skype over 4G will undoubtedly also offer an improved mobile internet calling experience and it has to be seen how network providers will overcome the leading provider's first mover advantage and mostly free service, and gain a profitable prominence in that space.

In all cases, VoIP is here to stay and there is much more revenue to be generated from voice, chat and video data. The risk for network providers of cross-cannibalizing their voice business is probably smaller than the risk of losing voice revenue to alternative data suppliers (Public Wi-Fi, Home Broadband, etc.). The key for the successful monetization of mVoIP will be predominantly around the structure of the new 4G data price plans, as charges for carriers' internet calling will need to compete with the "freemium" business models already available out there.

Sources

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6) GfK NOP Omnibus data (April 2011)

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YOUTH SMARTPHONE ACQUISITION DRIVERS: AFFORDABILITY, SOCIABILITY AND INNOVATION

By Adelynne Chao

Smartphone adoption has recently spread considerably across the youth sector. As the global youth market starts to pick up the trend for constant connectivity, the question for manufacturers is, which smartphones are being adopted by future generations and why? While the youth market aspire to own Apple, value for money drives them to buy Blackberry.

A smartphone for Christmas

The youth market for mobile devices is swiftly rising, and the age at which children acquire their first mobile phone is getting younger and younger. It is estimated that over 90% of 12-15 year olds already have a mobile phone and the number of smartphone acquisitions in this market is also growing [1]. Considering that a large amount of mobile phones acquired by the youth market are being gifted and are often from the medium to high-end price range, it is not surprising that the youth market are picking up the smartphone trend. Also, considering that most of the time it is the end-user that is influencing purchase of the gift, it is interesting to find out what are driving these decisions [1].

Blackberry handset acquisition is on the rise

GfK Technology has gathered key information from 12-15 year olds that demonstrate how the acquisitions of Blackberry handsets are significantly higher than other smartphone brands

It is estimated that over 90% of 12-15 year olds already have a mobile phone and the number of smartphone acquisitions in this market is also growing [1]

In recent years. Demand for Blackberry has been growing consistently, making up 21% of all mobile handset acquisitions for 12-15 year olds in December 2010, in comparison to just 7% for Apple and HTC [2]. This is an exceptional figure considering that just 2 years ago the demand for Blackberry handsets in this age range was almost nonexistent.

The youth market are most likely to consider purchasing a Blackberry for its value for money, design and BBM functionality

Young people want Blackberries because they are affordable and social
So what is driving this trend? Further data gathered from 16-24 year olds [3] show that the youth market are most likely to consider purchasing a Blackberry for its value for money, design and BBM functionality. BBM is an instant messaging application for Blackberry handsets that allows its users to send free instant messages to other Blackberry devices. This shows how the affordability of the low-end Blackberry handsets, such as the Blackberry Curve, along with the device's highly social capability is important in attracting young people.

For Blackberry devices, the most prominent channels of influence affecting the youth market come from advertising (56% had seen a Blackberry advert) and social influence (47% know someone that owns a Blackberry). It could be said that this word of mouth influence and feeling of 'belonging' within a social group is key to Blackberry handset adoption. Especially considering that just a few years ago Blackberries were mainly considered to be business phones, it is a dramatic turnaround that may have been driven, in part, by Blackberry's recent advertising campaigns.

The iPhone represents more of an aspirational demand from young consumers
Despite the fact that actual acquisitions in the youth market show that Blackberry device adoption is on the rise, data gathered from respondents in the 16-24 age range show that 45% were considering purchasing Apple in comparison to only 35% that were considering Blackberry. When looking at the reasons Apple iPhone devices were being considered, the results are very different. Those from the youth market that were considering the iPhone were most likely to be influenced to buy for the 'apps', to be part of the fashion and for the iPhone's design. Only 4% were influenced to buy because they thought the phone represented good value for money. It appears that the iPhone is a device that many aspire to purchase but the lack of affordable deals on the handset are pushing even more young customers to more affordable alternatives such as Blackberry, Nokia or HTC.

Nokia provides best value for money, but young consumers are looking for something more
Only 18% of respondents in the 16-24 age range are considering purchasing a Nokia for their next phone, despite the fact that 55% of them currently own or had previously owned a Nokia smartphone before. The reasons that young people had considered Nokia shows that purchase is largely driven by value for money or a good promotion on the handset. In fact, from all the smartphones that young respondents considered purchasing, Nokia had the highest consideration for cost and value for money.

HTC could be eating into Nokia's share of the youth market
Young consumers are now just as likely to consider the HTC brand as they are to consider the Nokia brand, and this is mainly being fueled by desire for the 'touchscreen', 'apps' and 'design' offered by HTC. All of these considerations are significantly higher in those looking to purchase HTC than Nokia. HTC represents an affordable version of the iPhone experience (with the touchscreen and android apps available) whereas Nokia users still consider the phone to be good for basic functions but do not seem to associate the brand with these key smartphone features.

The importance of portfolio
It is important for manufacturers to have a wide portfolio of devices to initially hook young consumers and then retain them as they get older, when affordability becomes less of an issue. In order for manufacturers to retain young consumers, they need to focus on strengthening their family of devices so the youth can aspire within the product range rather than looking towards competitor devices.

Currently, Apple, RIM, Nokia and HTC are all performing well in the youth market for different reasons. Nokia is particularly successful with their lower-end devices, Apple is attracting consumers seeking high-end capabilities and HTC is quickly catching up as an innovative yet affordable alternative. Blackberry's unique combination of highly social yet affordable phones, where owning one contributes to feeling of 'belonging' within a community, is faring well in the youth market. Therefore, young consumers' insatiable appetite for better features and advanced services suggests that the provider with the strongest range and portfolio of devices is more likely to attract and retain consumers from an early age.

Sources

[1] GfK Research Panels: Kids Mobile Phone Market Report Q110
[2] GfK Kids Consumer Panel (December 2010)
[3] Omnibus data (March 2011)



IN MARKET FOCUS: YOUTH IN BRAZIL

By Cynthia Vieira & Ryan Garner

The youth market is accelerating technological adoption in Brazil which is radically changing consumer needs especially in how they’re entertained and how they socialize.

The internet and technological innovation has firmly gripped the new youth generation in Brazil. The Brazilian youth are using the internet in very similar ways to mature markets. It is becoming a primary source of entertainment and a means to communicate and make their voice be heard. The core values and needs of young consumers in Brazil are very different to their predecessors. As a result, the Brazilian youth are redefining consumerism in this exciting new country and what is clear is that their hunger to consume will create opportunities that previously did not exist.

The radically different needs of Brazil’s new youth generation

Recent research by GfK shows that Brazil’s youth market, everyone aged 12-30, have a very different outlook on life than

previous generations. They see the internet as essential for access to the world, to friends, to acquaintances and all forms of entertainment. The internet makes the chores of everyday life easier and allows them to accomplish many things without leaving the home. For example, shopping from anywhere in the world, getting to know international places and museums, checking movie openings and, above all, saying things that some young people would not have the courage to say in person.

New skills and ways of working are beginning to emerge such as the skill of multi-tasking. Brazilian youth get involved with many things at a time and, because of that, time becomes relative. Brazilian youth are restless, impatient and hasty and typically lose track of time when facing so many possibilities and so many

For Brazilian youth, while conventional TV is still the dominant medium for TV shows, smartphones, PCs, tablets and mp3/media players are allowing greater access to internet based media.

attractions. Life needs to happen fast, and as a result, they crave the latest technology to help them enrich and meet their day-to day needs.

Entertain me! The multi-screen generation

The youth in Brazil crave entertainment and consume high levels of many types of media content. GfK’s research shows that Brazilian youth have no pre-conceived restrictions about what device they use to consume media: this conceptual barrier does not exist for them. While conventional TV is still the dominant medium for TV shows, smartphones, PCs, tablets and mp3/media players are allowing greater access to internet based media.

Brazilian youth’s insatiable thirst for media content has important implications for content producers, service providers and advertisers. With vastly different consumer needs to the older generation, brands and advertisers would be wise to reach out to this audience across popular media channels on the internet and across devices. Whilst the youth share family and career values with the older generation, consumption, socialization and entertainment are new values that define this new youth generation.

Amplify me! Everyone is an author

Social media is a core part of the way mature market consumers socialize and communicate. The impact of social media around the world is enormous. Recently, in Libya and Egypt social media has given the people a voice and has allowed groups to form based on their beliefs or political agenda. Brazil is politically stable but the emergence of social media is democratizing the means of production and distribution as the youth market revel in producing and publishing their songs, photos, videos and blogs.

GfK’s research shows that 35% of the Brazil’s youth market claim to keep a blog or photolog. Prior to the internet, there has never been an era in which historians could have had such direct access to letters, diaries and photo albums kept by the young.

Different social classes, same underlying aspirations

The difference between the aspirations of young people of different social classes has become smaller. Through the internet, they now encounter more of the same references, and so dream about consuming the same things. What is different still is their financial ability to fulfill those aspirations. For example, one of the greatest aspirations within the researched group was to buy a computer but while those from SEC C (social and economic classification) want to have their first computer with access to the internet, those from SEC B dream about trading their desktop computer for a notebook, and those from SEC A think of migrating from the notebook to a tablet with touchscreen technology.

What a young person can accumulate in terms of information, nowadays, is exponentially greater than what an adult could accumulate 50 years ago. Technology and access to information allow young people from all socio-economic classes to widen their possibilities when it comes to education, knowledge and professional growth.

Summary of Brazilian youth

Brazil, a BRIC market, is already recognized as one with high level s of growth and exciting opportunities for business. It is clear from this research that Brazil’s youth market is a vibrant one both in terms of their radically different needs and their propensity to consume. Their thirst for new and exciting ways to communicate and desire to be entertained is a clear sign that technological innovation is widely embraced, not just among the wealthy, but across a broad spectrum of Brazilian society. This not only presents technology companies, content providers and advertizers with an abundance of opportunities, but also a warm Latin welcome to do business in Brazil.

Sources

Research was conducted with those aged 12 to 30 years old in Brazil to understand their media consumption habits, both online and offline. The study focused on Sao Paulo, Rio de Janeiro, Sao Paulo’s countryside, Belo Horizonte, Brasilia, Salvador, Recife and Porto Alegre, looking at young people from SEC A, SEC B and SEC C. It was run in two phases – a qualitative stage, with 154 young Brazilians, followed by the full quantitative stage, of 2,000 interviews.

MUSIC DOWNLOADING: IS THE LAW THE ANSWER TO MUSIC PIRACY?

By Alexis Helcmanocki & Oliver Robinson

In June 2009 with the passing of the HADOPI law, France became the first country to use legislation to tackle the issue of piracy in music downloads. The UK Digital Economy Bill, which passed somewhat controversially through Parliament earlier this year, is similarly designed to tackle internet piracy through the use of legislation, including provisions for banning illegal file-sharers and blocking websites that infringe copyright laws. The question is how successful legislation of this nature is in reducing music piracy, and more importantly, encouraging legal consumption. There seems little evidence so far that they are doing either.

The IFPI (International Federation of the Phonographic Industry) has revealed its analysis of global music consumption in 2010, highlighting an overall drop in physical CD sales of -14.2%, with an increase of only 5.3% in (legal) digital sales during the same period leaving a significant shortfall in revenue for the industry.

However, this isn't to say the consumer appetite for music is declining, or that the transition from physical to digital consumption isn't taking place. In the UK for example, the IFPI state that 76% of all music obtained online in 2010 was unlicensed – consumers are still listening, but it seems they're increasingly less willing to pay.

Of course, music piracy will not be the only factor contributing to a decline in revenue – compelling rival entertainment options (read: video games) and the economic downturn will also play a part. Furthermore, it should be remembered

that every piece of music acquired illegally does not necessarily equate to a lost sale for the music industry; any valuable utility that becomes available for free in this manner will inevitably result in a certain degree of overconsumption. Nevertheless, it cannot be denied that illegal downloading and file-sharing are big contributors to the revenue drop indicated by the IFPI.

Almost half of those downloading music in France are still doing so through illegal sites

Let's take a closer look at the music landscape in each market. Starting in France, we can see that around 66% of consumers are still buying music on physical formats such as CDs, with only 15% having made a complete transition to digital consumption. However, the proliferation of digital music is principally being encouraged by the growing penetration of MP3 players, so that we now have around 60% of consumers who own some sort of digital collection (with

content mostly side-loaded from physical supports).

Most importantly, while only around a third of consumers in France are currently downloading digital music - with a growing proportion (11%) intending to move to digital in the near future - of those who do, 54% are claiming to do so illegally, either instead of, or as well as, using legal downloading music sites.

It is fair to say that the UK is a little ahead of France in terms of digital music adoption, with the BPI (the industry body for the British Recorded Music Industry) reporting that 41% of consumers have used a legal download service. On the illegal side, while the BPI state that 23% have obtained unauthorized music, they also report net increases in the use of both peer-to-peer services and cyberlocker sites in the last 6 months. For both markets, it is clearly important that action is taken to counteract this flow of illegal file-sharing. **HADOPI Law in France has managed**

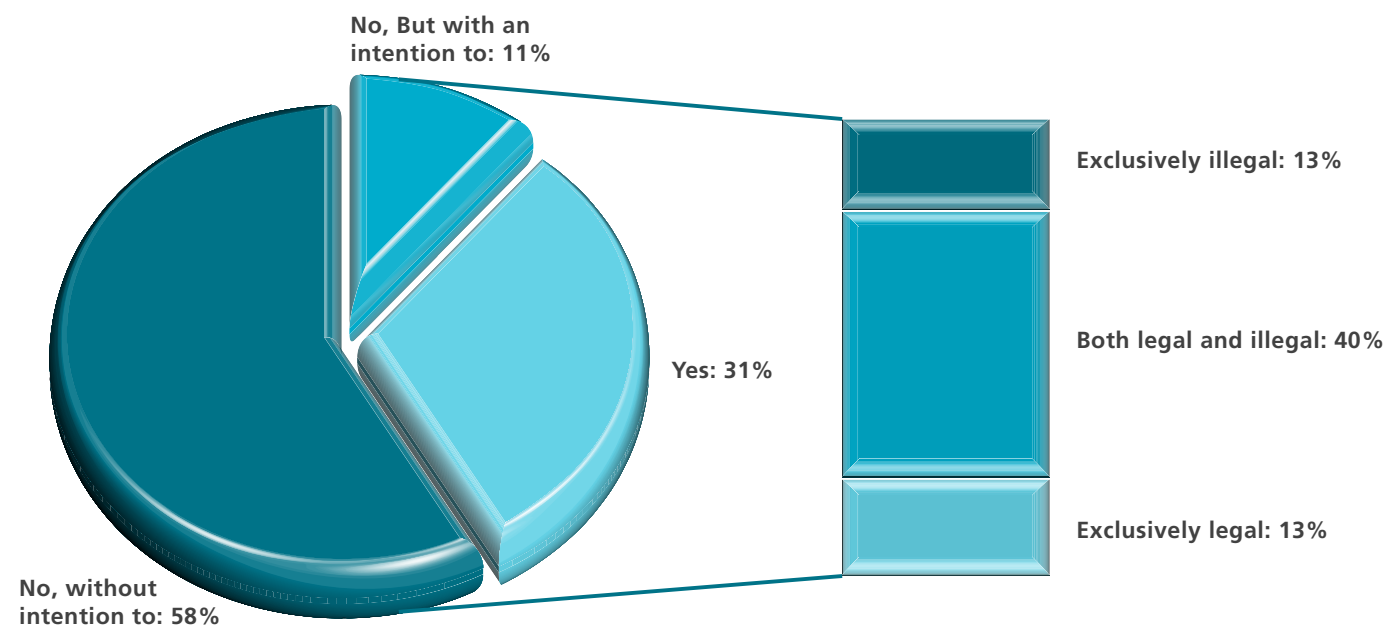


Figure one: Percentage of French Consumers downloading music through legal and illegal means

to curb some enthusiasm for illegal downloading

The HADOPI law in France enjoyed widespread media exposure when it was adopted in June 2009, but it is apparent that French consumers are still not entirely familiar with its content and implications. So, while 74% say they are at least aware of the law, only 39% feel they really understand what the legislation includes.

However, this is not to say that the law has been completely without impact. When asked what stops them downloading music illegally, 45% stated that fear of legal sanction is the major inhibitor alongside 44% who fear picking up a virus. Indeed, GfK has been tracking the trends of digital music consumption in France since 2008, and in this time we have noticed a decline in the level of reported illegal behaviour. With the stated fear of sanctions noted above, this would

suggest the HADOPI law has had some impact on behaviour - most likely from an educational perspective (i.e. through helping to put an end to the belief that music, and, more generally, digital content, are readily available for free)

Of course, any positive impact remains dampened by the inescapable reality that the legal side of the industry is not benefitting fully from a decline in the illegal side. The shortfall in revenue suggests that the HADOPI law remains an incomplete solution to the impact of music piracy in France, and at present the industry has failed to give consumers a legal, digital alternative that is compelling or acceptable to them.

Compelling legal services will provide a better incentive to stop illegal acquisition

When we asked consumers in France what the barriers to downloading music legally are, it's interesting to note that it is not necessarily the price of legal music which is the main obstacle. While price is key for around a third of consumers, the remainder cite a range of reasons from a general lack of interest to problems with existing legal services (low quality downloads, small catalogue available etc.) While these barriers remain in place, these consumers will continue trading-off either in not consuming digitally at all, or going back to purchasing physical media, such as CDs.

As indicated by the first four reasons stated above, it could therefore be reasonably argued that the main impetus to encourage legal downloading amongst non-digital consumers in France should be around educating people on the benefits and security of legal downloading services.

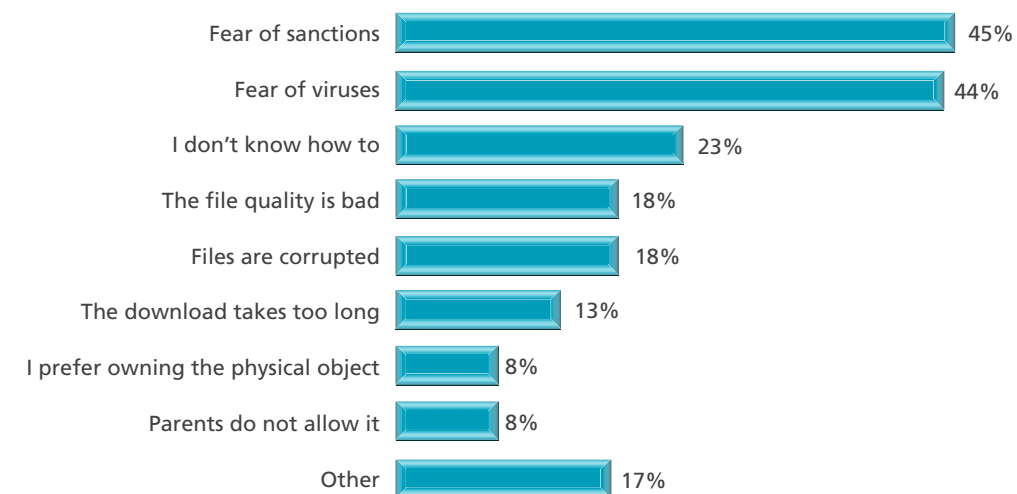


Figure two: What puts you off downloading music illegally?

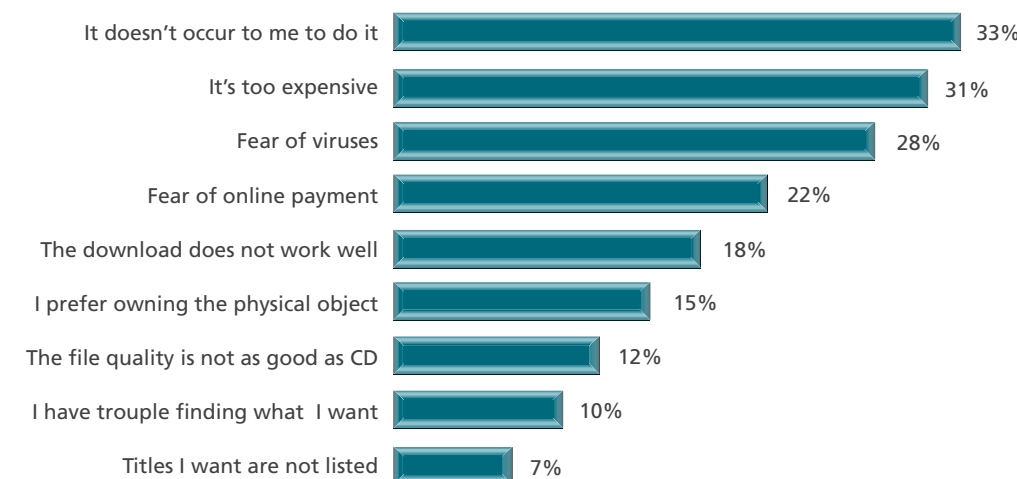


Figure three : What puts you off downloading music legally?

Indeed, as the digital frontier becomes increasingly blurred and French consumers struggle to perceive which services are legal or not, this point will only grow in pertinence. (As an example, just look at the reactions to illegal streaming of videos in France: only 28% of French feel that they are acting illegally in doing so.)

As more and more content (including books, magazines and video games) moves online and legal music streaming gains momentum via sites such as Deezer, the key to encouraging legal music consumption in France will not be to impose more laws, but to educate and inspire consumers. Not only is the law never fully aligned with behaviors and attitudes, but the drivers of adoption for digital content are not yet powerful

enough in France to take advantage.

So, what can we learn from France with regard to other countries – in particular to assess the likely impact of the Digital Economy Bill in the UK ?

One key difference between the two markets at present is how embedded legal services are in the consumer mindset. Music streaming service Spotify recently introduced listening restrictions to its free, ad-supported model for the first time, indicating its own problems in driving revenue from customers growing increasingly accustomed to getting music for free. However, there remains a wealth of secure, easy-to-use services in the legal portion of the market that will be hoping for increased usage as the Digital Economy Bill gains traction.

Ultimately, the Digital Economy Bill will certainly have an impact on illegal downloading, as we've seen in France, but it's unlikely to solve the problem of music piracy altogether. Instead, the key to its success (for the music industry at least) will be measured in upturn in revenue rather than downturn in piracy, and that's as dependant on ensuring enticing alternative services are available at price points acceptable to consumers as much as the legislation itself.

Sources

On-line survey conducted by GfK Custom Research and GfK Retail & Technology, each year since 2008. Latest edition Dec 2010, sample of 2337 respondents aged 15 and older.



RESEARCH ROI - GENERATING INSIGHTS THAT MATTER

By David Krajicek

With such a large and diverse amounts of information available to brand managers, often integrating this information can prove to be a difficult task. David Krajicek takes a look at research ROI and how you can identify and quantify the metrics that matter most in your business area.

In part one, Dave Krajicek looks at how to get the most of out of your research dollar so companies are generating insights that really matter to their businesses.

[Click the screen to view part one](#)

[Click the screen to view part one](#)

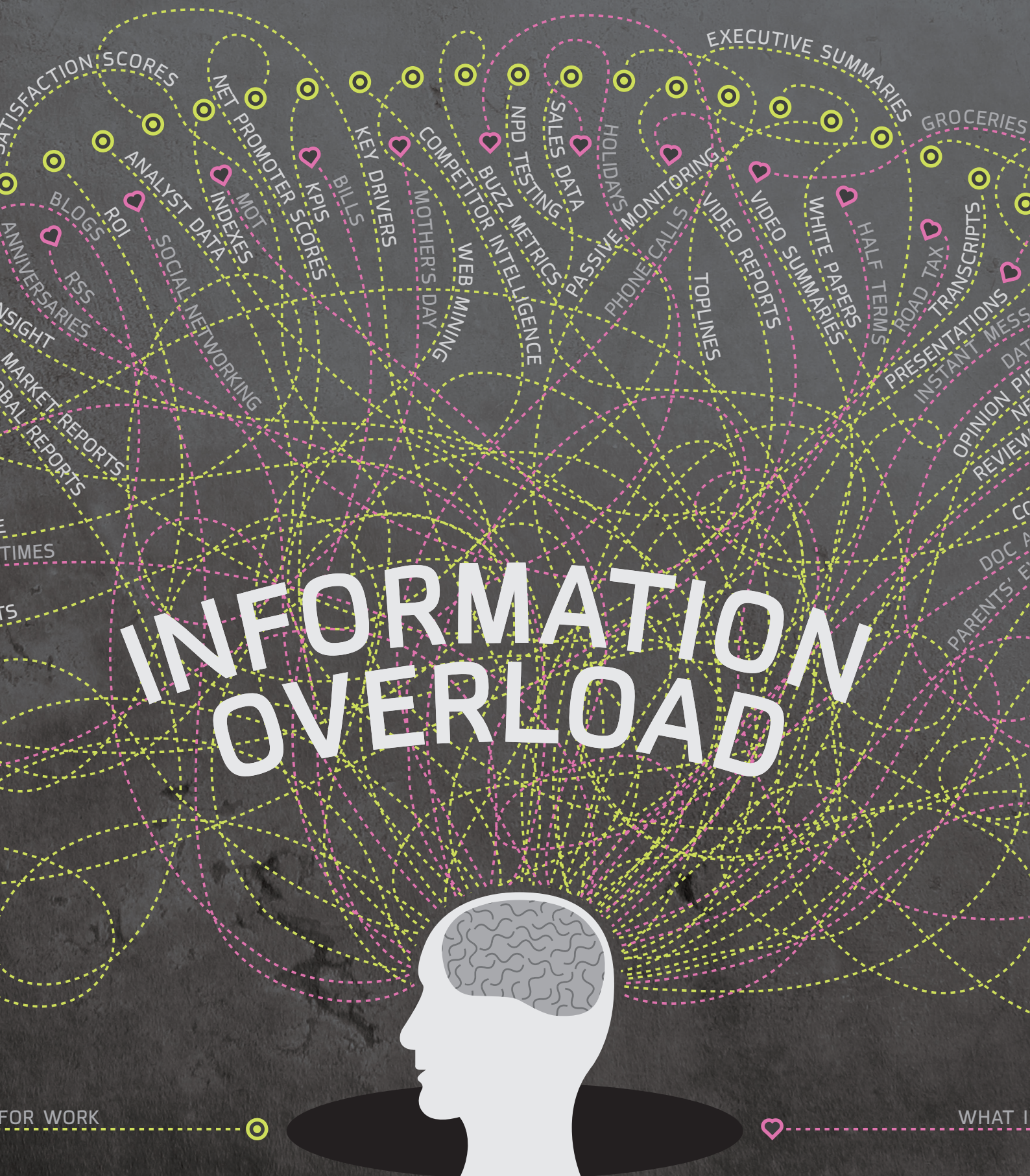
[Click the screen to view part one](#)

[Click the screen to view part one](#)

In part two, data integration shows how linking disparate information sources together can yield greater insight over time.

Part three looks at how attitudes and perceptions drive consumer behaviour, this is illustrated through a recent case story.

In part four, Dave Krajicek outlines the key benefits to using integrative models to generate incremental or additional insights in business.



INFOGRAPHICS: PICTURES TELL A THOUSAND DATA POINTS

By Laura Fry

GfK Tech Talk is developing a new series of posts around the work we're doing to marry information and communication in a story of beauty, creativity and good research sense. Infographics, animation and video are all designed to help overcome the challenge of information overload, help businesses see more from research, and capture our audiences' imaginations when telling stories about technology, ideas, business and society.

Information is everywhere

The last time you searched for information online, how many returns were there? And the last time you needed to find some evidence to support an argument or theory, how many books, magazines and publications did you consult? What about businesses, how many sources of data do you think they track, monitor, and purchase on an average day to understand what their customers think and want, what the market is doing and what their competitor's next moves may be? The answer is lots. Tons. More than, perhaps, we can imagine.

As consumers, marketers and decision makers, we live in a world in which information is in plentiful supply. We have more tools, methods and approaches than ever to help us become more informed, more knowledgeable, better prepared, more creative and more strategic in our thinking. Wow! But what do we do when all of this information starts flooding our inboxes, our hard drives, clouds, conversations and thoughts? How do we filter out what's important, what can make a difference, what's truly meaningful? And how do we find meaning and relevance to our unique contexts when everything we come across seems 'critical' or comes packaged with the words 'key findings'?



Figure one: The Swatch Fan

As researchers, we're guilty of contributing to more and more matter to the information universe. And we're becoming more and more aware of how time-consuming, complex and confusing it can seem trying not to get lost in this universe is for our clients and audiences. Routing around trying to find some gravity to lead us where we need to go, or discover somewhere we'd never considered, is becoming a preoccupation that businesses just cannot afford when the decisions being made as a result carry greater weight and significance. For tech businesses in particular, fast-paced innovation and a hungry mobile population, means information streams are constant and the universe keeps growing. Trying to find that which has real meaning

and significance to the unique needs of any one company is rare in relation to the sheer volumes available.

Making sense of the noise

So we've turned the world of design for some help in ensuring the information we deliver to businesses helps overcome the challenge of information overload and limits the potential of getting lost when looking for answers, solutions, evidence and opportunities. We want to leave businesses with meaningful and significant insight and opportunities that can be seen and heard without the potential of getting lost in some black hole of infinite irrelevance and 'noise'. What design can do for information is what the telescope can do to the night sky – helps anyone

point a lens and see more from what they're looking at. For example, figure one demonstrates a mobile phone manufacturer users' behaviour and how 'successful' visits to the apps store are. Colours were chosen to instil a young vibrant feel to match the client's brand. The size of segments and text size is proportionate to the value indicated, making obvious comparisons. As a result, there is a detailed and visual understanding of successes and failures across user experience which was used to reach range of stakeholders in the client company. As you can imagine, using a traditional chart to illustrate this data would have been far less successful.

ONLINE DELIVERS: Exclusive and Highly Cost Effective REACH

KEY FINDINGS			
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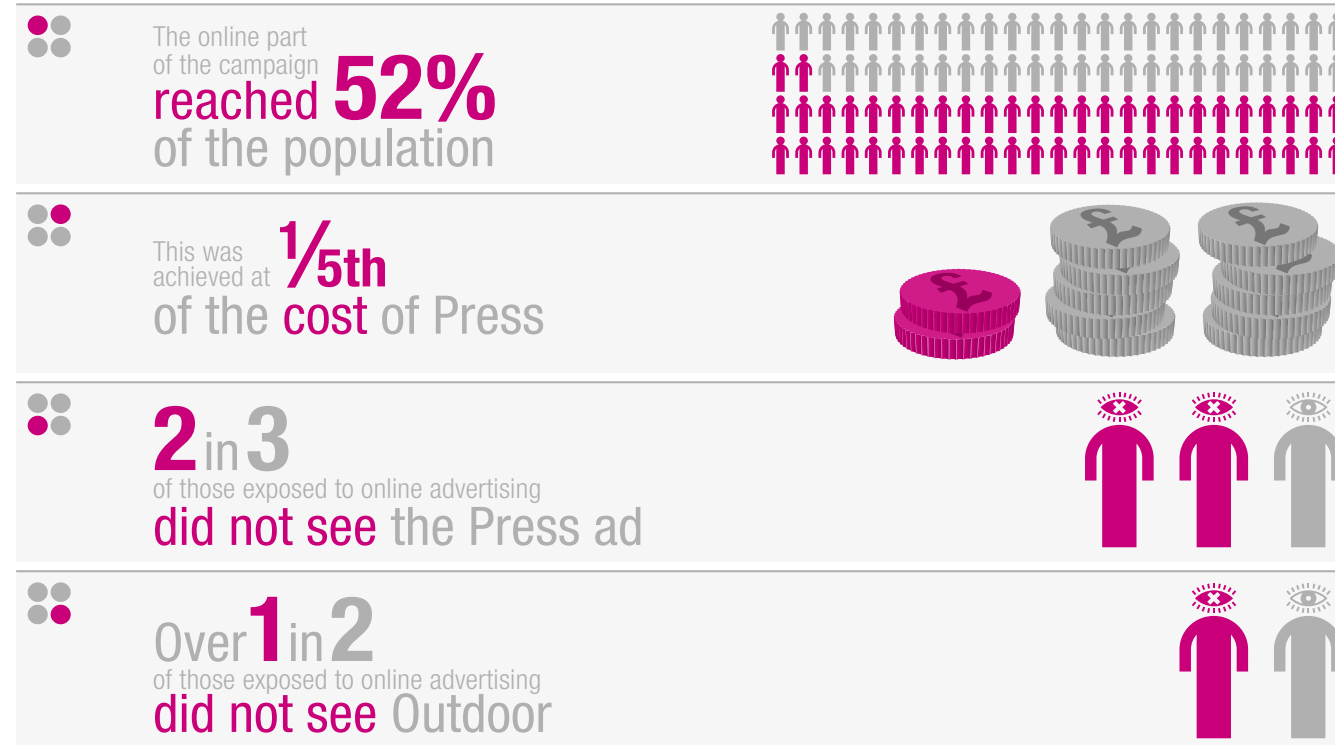


Figure two – Online Advertising reach

We believe information should be clear, concise, loud and relevant to make sure audiences – even non-researchers – get the message and won't be cast aside in the 'that means nothing to me' bin, or worse, the 'what a waste of money' bin.

Information is beautiful

Infographics can help us tell stories from data in more visual ways, without reducing the information depth. In particular, we've been using infographics to help us tell stories from data in more visual ways. For example, figure two communicates the key findings of recent online advertising research in a very simple and effective way. A traditional chart runs the risk of being over complicated and confusing. Using a clear infographic like this one eliminates

that risk and as a result, the message was read loud and clear.

With design, we can construct our stories to achieve particular goals around communicating relevant messages to our audiences.

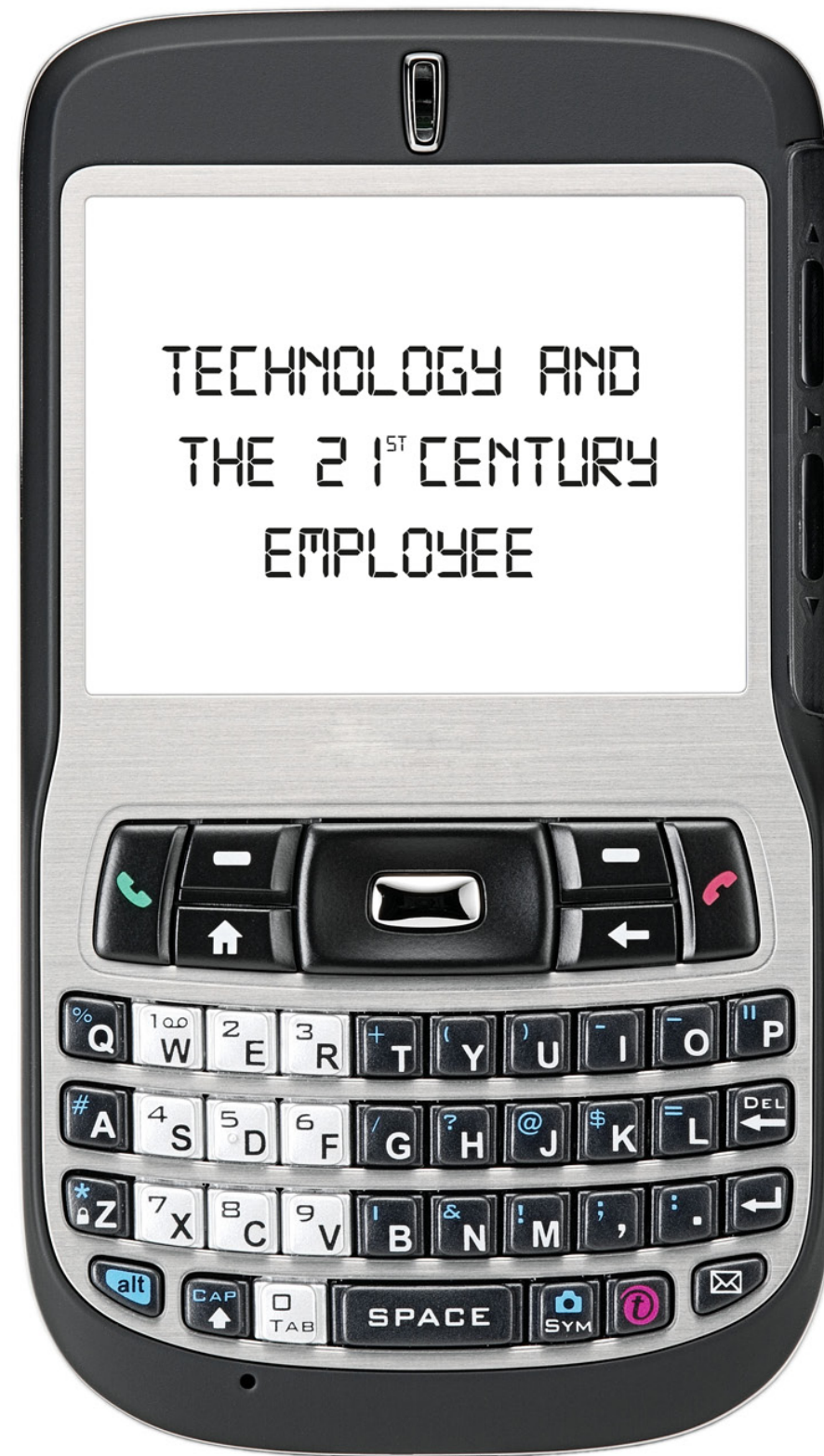
No doubt most of us will be naturally drawn towards using infographics over traditional charts as a method for communicating data heavy messages. Marrying design with information helps to create a visual solution to tell a story and it does so in a captivating and compelling way. The use of design to create an infographic also offers something for us to share with others. Something we feel compelled to pass on, take away

and shout about because of the balance between the eye catching visual and the depth of content.

We're developing our skills around infographics, design, animation and video in order to make our work go

further towards helping businesses and organisations make big decisions, as well as giving an even greater voice to our passion for research and technology.

Stay tuned to the **TechTalk blog** where we will be showing you more examples of our work around communicating facts, figures and stories in highly visual, compelling and exciting ways.



TECHNOLOGY AND THE 21ST CENTURY EMPLOYEE

By Kieran Pedley

Increased productivity, or increased stress? New findings by GfK show that, although modern workers are embracing technology right now, there is evidence that the pace of change is risking a divided workforce. This situation presents significant challenges for policy makers and business leaders, creating a need to ensure the workforce is adequately trained and can manage the increased pressure and stress levels of working in an ever-connected environment.

Increased productivity, or increased stress?

New findings by GfK show that, although workers are embracing technology right now, a sizable minority fear the role technology will play in their future careers [1], thus risking a divided workforce. This situation presents significant challenges for policy makers and business leaders, creating a need to ensure the workforce is adequately trained and can manage the increased pressure and stress levels of working in an ever-connected environment. On the other hand, could there be opportunities for technology companies to develop and adapt new technologies to meet the needs of the disaffected minority?

Teleconferencing, BlackBerries, smartphones and, now, tablet computers mean it has never been easier to be in contact with the office. As technological advances alter the way we work, a debate has emerged between those that stress the unhealthy blurring of the boundaries between work and personal lives, and those that see technology as empowering the modern worker to fit their career around other demands on their time.

The 21st century worker's 'love affair' with technology

The survey showed that 60% of workers think technology helps them to do their job better, and just under half (47%) say that it has a positive impact on their work-life balance. Only 7% said it had a negative impact.

A recent GfK survey shows that 60 per cent of workers think technology helps them to do their job better, and nearly half (47 per cent) say that it has a positive impact on their work-life balance.

The positive benefits driving these perceptions include technology's power to help workers organize their time better and communicate more effectively with colleagues, with 43% of workers feeling that technology makes them more productive at work. The cumulative result of these benefits is that just over half (52%) of workers agree that technology empowers them in their job. Not only is technology cool, it also helps working people get things done.

High earners have highest appreciation of technology

"High earners attraction to technology can be explained in one word – flexibility." Unsurprisingly, it is high-earners that appear most positive towards our ever-connected world. They, more than most, need to be in constant contact with colleagues and the latest market news, and devices such as the BlackBerry or iPad make this possible. Some would consider this ever-connectedness to work to be a burden, but the attraction of technology to these

busy executives can be summed up in one word – flexibility. For high earning households, 62% think technology allows them to be more productive at work (compared to 43% for the overall population) and 7 out of 10 claim that technology's ability to let them work occasionally from home has a positive impact on their work-life balance. This flexibility gives a sense of control, leading 72% of high earners to say that the technology they use at work makes them 'feel more empowered in their job' (compared to just over half of the overall working population).

The disaffected minority

So far, it looks like the 21st century love affair with technology is continuing unabated. However, there is a sizeable minority who are fearful of the role technology will play in their future careers. We are seeing some senior executives struggling with the pressure of always being on call, as well as low paid workers worrying that their lack of technological knowledge will threaten future job prospects. Added to that, some middle management workers worry that future changes in technology could threaten their existing job, piling more stress on top of current job insecurity and the extended retirement age.

The struggle to switch off

"One in four workers says technology at work means their work life disrupts their personal life." Even amongst the largely favorable higher management, some admit that technology means they struggle to switch off. 38% of those in higher management positions admit technology makes them feel they 'have never really left work', and one in four say technology means their work life often disrupts their personal life.

This sets a new challenge for policy makers; a recent study by GfK conducted amongst 30,000 workers in 30 countries shows that 1 in 3 workers worry about stress levels at work and there is clear evidence technology can cause this by making people ever connected. Furthermore, workplace stress is ranked by international health organisations as one of the key causes of sick leave. Ever-connected workers need clear guidance on when and how to switch off from work, in an era where the boundaries are often unclear [2].

The struggle to keep up

As some worry about being able to switch off, others worry about being left behind. Overall, a quarter of workers fear that advances in technology may threaten their current job in the future, and this rises to 40% for those earning less than \$22,000, and 35% for semi or unskilled workers. The actual numbers involved are likely to be much bigger, when factoring in the unemployed too. Businesses and government face a clear need to provide training programmes, both inside and outside of the workplace.

This is a global problem, as it is estimated that 27% of workers globally think there are inadequate job opportunities out there for them already. Therefore the future could be bleak if technology threatens future prospects.

A quarter of workers fear that advances in technology may threaten their current job in the future, and this rises to 40 per cent for those earning less than £14,000, and 35 per cent for semi or unskilled workers.

The majority of workers currently feel comfortable in our ever-connected business world and think that technological advances help them to juggle competing priorities of work and home life well. However, some find it hard to switch off, which is having a negative effect on their work-life balance – and ultimately, therefore, on their long-term productivity at work.

In addition, it should not be assumed that the workforce is advancing as technology advances. There is a significant number who admit to a fear of being left behind in their careers, due to their lack of knowledge of technology and the rate at which it is developing.

Policy makers and business leaders face significant challenges, to ensure an adequately trained workforce that can manage the increased pressure and stress levels of working in an ever-connected environment. Technology companies can and have to help as well. When offering their solutions, they need to understand that an easy to use interface is an important element to help those who fear being left behind. On the other hand, while they innovate around even more technical solutions, thinking about offering ways to switch off without jeopardizing business efficiency: what is the modern reply to the good old secretary?

Sources

[1] GfK interviewed 514 full time workers between 8th April and 11th April 2011.

[2] The GfK International Employee Engagement Survey was conducted by GfK Engage. It includes the opinions of 30,556 working adults in 29 countries who were interviewed between February 8th and April 4th 2011 using online, telephone or in-person interviewing techniques appropriate to the country.





From passive consumers to pioneering co-creators - THE MAGICAL WORLD OF ONLINE CO-CREATION

By Dr. Simon Pulman-Jones

Once upon a time, there was a secret world, full of closed doors: the world of commercial research and development. But like so many aspects of our lives, this world has also become digital in recent years, and as a result it is no longer quite as secret or as closed. Researchers and developers now actually view this as a positive development, because they recognize the significant advantages offered by open innovation processes. And so, from the secret world of the analogue age, today's magical world of online co-creation was born.

For many companies, online co-creation is now one of the main avenues to open innovation. This qualitative method is based on working with people collaboratively online, in a wide range of ways – from small groups brought together for only a few days to longer-term work with large market research or corporate brand communities – to generate ideas for completely new products and brand experiences. This process draws inspiration from a much broader range of consumers' desires, expectations and behavioural patterns. For example, GfK brought customers – mobile phone users in Australia, Europe, India, Russia and the US – together in a co-creation community in order to discuss

ways of improving mobile services and customer experience.

How it all began

The idea of co-creation was born in the 1990s, when competition between brands increasingly began to shift from product features and performance alone towards broader, holistic product and brand experience. It was also becoming clear that although companies are the owners of their brands, consumers ultimately determine the brand's value and therefore its future. In the past decade, some seminal moments brought widespread acceptance to this notion.

One example is the campaign waged in 2003 by the Neistat Brothers, two young

independent filmmakers from New York who wanted to persuade Apple to extend the battery life of the iPod. They posted a short critical film on the internet that was viewed over a million times within six weeks, and the story was also picked up by TV stations and the print media worldwide. What could have been a bad news story for Apple in fact became a story about how passionately their fans loved the brand. It became evident that consumers' access to social media – these powerful online communication tools – would allow them to play a significant, positive role in improving the performance of their favorite products.

In the course of time, more and more companies have recognized another key opportunity offered by the social web: the desire of consumers to play a role in creating and defining their own experience of a brand that they value.

In the course of time, more and more companies have recognized another key opportunity offered by the social web: the desire of consumers to play a role in creating and defining their own experience of a brand that they value. Nike, for example, offers consumers the possibility of designing sports items such as shoes, shirts and bags themselves through the NIKEiD feature on its website. Color, cut and material can all be freely determined within a given framework. With approaches like this one, Nike is already exploring online co-creation: by applying creative widgets, they are enabling consumers to take part in the design process. They are supplementing their previously product-dominant business models with new services and an individualized brand experience.

The social web as a basis for co-creation
However, as a qualitative innovation tool, online co-creation goes far beyond individualized product design. It uses three

key features made possible by the global development of the social web over the past five years.

1) New channels for consumers and brands to engage with each other
Social media tools such as blogs, forums and social networks enable companies to engage with consumers regardless of their geographic location and at times that suit their busy schedules. Companies can therefore gain access to previously hard-to-reach consumer groups, and consumers have the opportunity to collaborate on market research projects from the comfort and privacy of their own homes.

2) Participation in innovation through user-generated content
By uploading their own videos, photos and designs and annotating and critiquing other people’s submissions, consumers can express their creativity and judgment. Ongoing developments in easy-to-use online visualization and animation tools

in the social web increasingly promise to level the playing field between consumer innovators and their professional counterparts within companies.

3) Social and game-like interactions to unleash creativity
The success of social games such as Facebook’s FarmVille has shown that game-like playfulness is a key enabler of interaction on the web. The vital dimension of gamification makes co-creation fun, rewarding and meaningful.

The full power of consumers as innovation collaborators with brands will only be unlocked if co-creation projects offer their participants social media applications incorporating these three key dimensions.

Fine-tuning for co-creation that brings success
Online co-creation is still an emerging and rapidly changing field of research. In fact, this state of affairs is in itself a valuable source of excitement, energy and inspiration for consumers and professional innovators alike in the process of creative collaboration between brands and consumers. However, co-creation services have reached a level of maturity that has allowed important lessons to be learned.

1) Translating insight and innovation objectives into meaningful, engaging tasks
Framing creativity tasks in an open-ended way does not work online. Merely asking people to tell you, “What would your ideal product look like?” will leave them uninspired and confused and in an online environment, these consumers will rapidly disengage and lose interest. Tasks must therefore be clearly, imaginatively and creatively formulated.

2) Bringing ideas to life
Using graphic designers to bring consumers’ innovation ideas to life means that consumers see their proposals blossom into reality, making them feel that their suggestions are valued. Groups or communities of consumers can then build upon and enhance each other’s ideas. And translating consumers’ ideas into standardized storyboard scenarios allows them to be tested and benchmarked in online concept evaluation tools such as GfK TechTest. If they cross this hurdle, the ideas become real products: a new type of eReader, a cable reel for charging devices, an unbreakable plant pot made of silicon, a toothpaste dispenser. The best ideas come from consumers working closely together with companies’ product and brand teams.

While the maturity and availability of social media platforms means that we are now seeing the launch of many new specialized co-creation portals, enabling a direct exchange between consumers and companies or brands, established market research has a decisive role to play: that of the intermediary. It must interpret companies’ business and brand objectives for consumer participants in co-creation projects and, conversely, help those responsible for products and brands to see the business potential in new concepts imagined by consumers.

Co-creation as part of a hybrid approach
Co-creation activities range from quick-fire team brainstorming, where everyone posts initial ideas in a blog, to extended periods of individual, diary-based, exploration of new product possibilities. Each of these variations informs and inspires innovation in different ways. The key to successful co-creation is not to rely on any one approach, but to draw on the differing types of input that each can provide, in combination with offline qualitative and quantitative research.

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In the new social media world, online market research needs to function at the same rate as the working life of a company, and so provide a direct contribution to ongoing business decisions.

A STRONG COMMUNITY

By Mike Cooke

The participatory nature of the internet has changed the world and with it, market research. Online communities are a logical consequence of these developments and they have also forced the industry to undergo a cultural change, with respondents increasingly becoming research partners. Loose panel alliances have the potential to be high-performance research communities. They allow collaboration, co-creation, and most importantly, conversation. At their heart is the reality of the brand, holding open and creative conversations with the most active consumers that society has ever known.

It is hard to imagine the market research world today without online access panels as a research modality. Access panels, ideally, are set up to serve as more than just a speedy, cost-effective platform for ad hoc research. These are sustainable and long-term surveying environments. They are more in-depth and facilitate conversations between companies and their target groups, evolving into online communities.

Online panels 2.0

By their very nature, panels require a certain level of care, which means that the mood of panel participants must be nurtured. Because internet users are spoilt for choice on the web, market research has to double its efforts regarding online panels, to react to the ever-expanding assortment of audiovisual stimulation, interactive features and widgets, which are small, fun-based applications. Users often consider static sites to be boring and

uninteresting and are therefore quick to click away from them, or do not even click on them in the first place. A traditional online panel which is limited to ad hoc surveys is not only unappealing in the longer term for the present-day active internet generation, but is also not able to take full advantage of the considerable desire to communicate which is manifest in today's consumers, who are anything but passive.

Market researchers' endeavors have resulted in the recent development of "socialized panels", which extend traditional access models by the use of social media tools. These panels display questionnaires as games, puzzles, forums, blogs, cloud tags or wikis, as well as offering applications to up- and download photos, PDFs, audio files and videos. This list keeps growing, because each new application and every new widget provides more opportunities for the creative researcher to explore new qualitative depths.

Market research online communities (MROC)

The ability of a socialized panel to achieve loyalty from its members is directly connected to the number of social media elements it includes. This defines a virtual market research online community (MROC). It is then also possible to play the highest trump card in Web

2.0: social networking, interacting with people you know. This is the biggest difference to the traditional access panel model, where only the panel owner knows that an individual is a member of the panel. Conversely, in an MROC the virtual identity of the respondents may be known to the other respondents through user names and profiles. For the common objective of market research, this creates a shared presence in which relationships can be established between any of the participants, be they respondents, researchers, or clients, as they interact with each other.

In the new social media world, online market research needs to function at the same rate as the working life of a company, and so provide a direct contribution to ongoing business decisions. Conventional research methods are not always able to keep pace with business demands, so decisions are sometimes made before the final data is available.

Market research conducted within socialized panels and communities can easily be combined with intranets and communities for companies, products and fans, for example. Everything is possible with technology. In the UK for example, GfK and media owners operate the "Media Jury" community, allowing the possibility of tapping into

the opinions of their readers, listeners and viewers immediately and cost effectively. Discussions occur of their own accord and do not require market researchers to act as moderators.

MROCs: also a basis for passive online market research – the way to "market research 3.0"

Regardless of the kind of online panel in which consumers want to be involved, the general rule is that it is essential to establish a trusting relationship between researchers and research participants. This makes it possible to obtain deeper insights, including passive observation of broader online behavior.

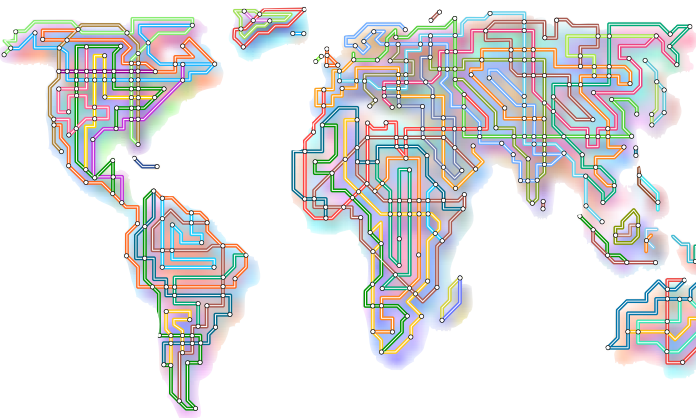
Digital tools like online communities make it possible to measure and thus observe in a passive way: for example the effectiveness of online advertising, analyzing the competitive environment, or even simply evaluating a company's own advertising.

If we take the view that the internet could now be evolving from a social web (2.0) to a semantic web (3.0), this would mean that users will, in the future, be able to utilize the net even more intuitively than they have to date. And market research will have to accompany them equally intuitively, both in and outside the digital world. Welcome to market research 3.0.

INSIDE GfK

Keeping you up to date with some of the activities that have been keeping us busy in recent months, as well as letting you know about new initiatives and across the company.

Cross-platform internet usage study announced – Connected Life.dx



We live in an increasingly convergent world, with consumers using many different devices to reach and act upon decisions in their online activity - and yet our understanding of consumer online behavior is currently ‘silo-ed’ by platform. What makes this study really unique is the combination of true cross-platform behavior monitoring and survey-based measurement of consumer’s attitudes and preferences.

Connected Life.dx will provide a 360 degree view of web browsing and apps utilization, for both fixed and mobile, and will answer urgent questions about how different kinds of web access complement each other and demonstrate for example how to integrate multi-channel activities across campaigns. It will also give an idea on the adoption of cloud computing. More than 400 consumer participants from Europe, the Americas and Asia will be recruited, to have their online behavior across a range of devices continuously monitored,

over a period of three months. They will also complete regular questionnaires regarding their intentions and attitudes to online browsing and behavior. This data will then be combined with extensive user profiling, and ultimately determine the relationship between mobile and fixed internet usage, and how this drives consumer behavior. Initially, it will focus on consumers’ internet usage via PCs, laptops and smartphones and then progress to include tablets.

Through this, the research will reveal cross platform consumer journeys - where they go, what they do and how they think – and explore the barriers and drivers for each type of access, including how consumers access the same brand differently in a mobile and fixed Internet environment. These findings will prove incredibly valuable to device manufacturers, content providers and digital marketers, particularly in areas such as customer retention, acquisition and, more broadly, customer experience.

About the study

The study is powered by GfK’s proprietary nurago technology - an integrated approach which allows holistic data analysis, including monitoring of websites visited; app usage; communication habits (calls, SMS, MMS); network and data transfer analytics; app/SMS/MMS usage; and device usage overall – including systems information such as battery power and charge. The profiling survey will cover demographic, tech sophistication, lifestyle, brand preferences, and consumer values.

In Tech We Trust - Influential Americans place trust in tech companies

GfK recently carried out a survey to assess the level of trust that

	The Influential Americans® (95)	Other Americans (601)
Technology Companies	70%	60%
Retail/Shopping Stores	67%	71%
Packaged Foods Manufacturers	60%	65%
Personal Care Manufacturers	60%	61%
Automotive Companies	56%	52%
Local Town or City Government	53%	48%
Pharmaceutical Manufacturers	52%	44%
The Media	49%	44%
State Government	45%	30%
Insurance Companies	44%	39%
Financial Services Companies	45%	35%
Federal Government	45%	31%

the public has in American corporations. The results showed that technology companies came out on top (70%) amongst a group of leading disseminators of information, which GfK Roper describes as, The Influential Americans® [1].

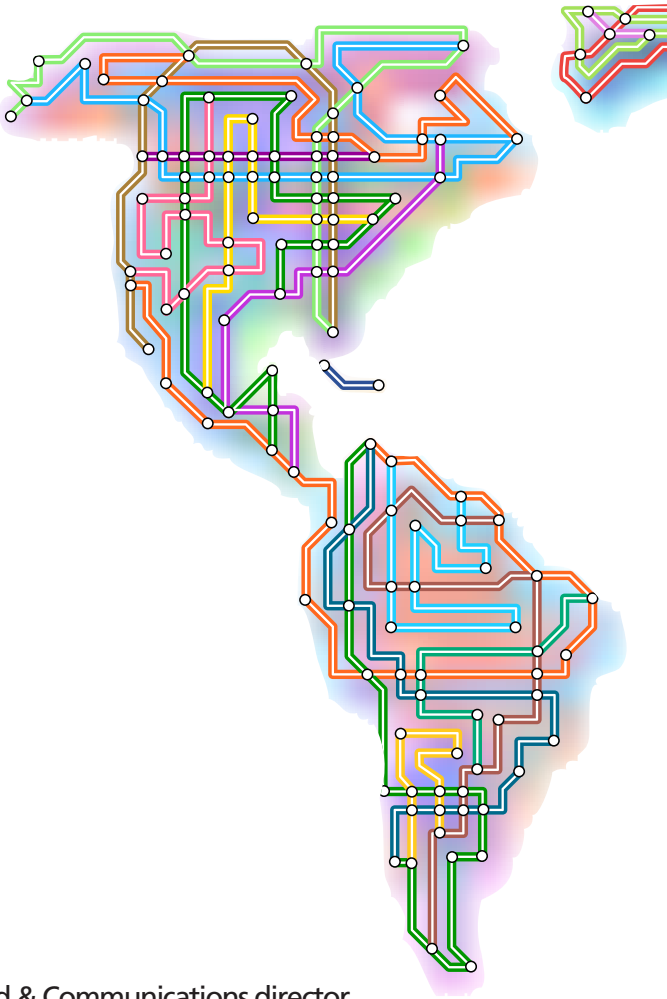
The result comes in the wake of the largest recession since World War II, with the American public today wary of large corporations as media reports say mistrust is at an all time high. This lack of confidence also appears to extend into the future – over one in two (55%) feel it will be harder for corporations to gain their trust in a few years. These results echo how The Influential Americans® view corporations – a vast majority (74%) find it harder to trust American corporations today than a few years ago and six in ten say it will be harder in future to earn trust.

Sources

[1] The American Influentials is a part of GfK Roper Influentials Market Analysis 2.0.

[2] All interviews were conducted among a representative sample of the online population from GfK’s Consumer Online Panel using GfK OmniWeb*. Completed interviews are weighted to ensure accurate representation of the 18 years+ online population.

[3] GfK Custom Research North America 2011 Corporate Trust Survey; Total population (1,006), The Influential Americans* (124), Other Americans (882)



New Brand & Communications director



GfK recently appointed James Conrad as Brand & Communications Managing Director, based in the US. His particular focus will be to strengthen our service offering for the Business & Technology clients.

James looks back at an international career with Millward Brown, where he held several senior roles including: Regional Manager for Latam, President of MB Canada and several years as Group Director in Atlanta, US.

James has been very involved in the industry over the past two decades which have included acting as chairman for several industry associations and sitting on the advisory board for Georgian College’s Research Analyst program.

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