

## market research reloaded

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This paper summarizes the results of a large number of discussions which researchers on both the bureaus' side and the clients' side in the Netherlands have engaged in concerning the future of the professional field of market research, and to inform you of how the MOA, the Dutch professional association for market research, has translated these discussions into specific policy and measures ensuing from that. Let's go back to the end of 2009. As in many countries, the economic crisis was in full swing and like agencies all over the world the Dutch bureaus were not spared from its effects. There was great pressure on turnover; some bureaus saw 20% - 40 % of their turnover evaporate. An unprecedented situation, and thus for the bureaus it was all hands on deck. This crisis, and the pressure among the clients nevertheless to satisfy internal information needs despite a considerably reduced budget, had great consequences for the research sector. Clients found cheaper alternatives to tracking studies, for example, which were replaced in rapid tempo by web-data. The central question which emerged at the end of 2009 related to the future of market research. What dangers could threaten our professional field, and what opportunities might there perhaps be for the sector in the fast-changing world of the information industry?

In order to provide an answer to the changing market circumstances and how to deal with them as a sector, the management of the MOA started the Neil Armstrong project. The project was named after the man who, with his famous 'small step', first let the world get acquainted with a new planet! His mission was pioneering, innovative and set a terrific number of things in motion. We seriously wondered whether market research too was

ready for such a drastic step.

The first important observations with reference to several exploratory discussions were the following:

- The entry thresholds to the sector have been lowered; in consequence, the uniqueness of the research bureaus will disappear. The information sector is becoming low-threshold; everyone can arrange his data-collection for himself (cheaply and/or Do-it-Yourself) and/or obtain data in a non-traditional manner, from non-traditional research sources: in this context, one must then think primarily of web-based information!
- In the market research sector, there will be less and less emphasis on answering the questions “*what*” and “*how many*”, and it will increasingly come to revolve around the question “*why*”, or, the recording part of our professional field will be fleshed out in a different manner, on the basis of research sources other than the traditional ones. “Traditional” market research will, in particular, come to play an increasingly important role in the strategic questions.

But how do we go further now? What is expected of the sector: are these developments dangers, or are they in fact challenges and opportunities?

In 2010 the discussion of the future outlook within the sector was pursued with greater intensity, for it was clear that within the sector something must happen in order to prevent us as a sector from missing the boat as regards the developments, and to prevent other suppliers from then taking ‘our’ place!

Special meetings about the future of the professional field were organized, a market

research study was conducted among clients to take stock of the extent to which those clients were already making use of alternative information sources and were thus passing the research bureaus by for a part of their information needs, and finally, at the end of 2010, an extremely captivating two-day “Think Tank” session was organized.

This so-called “Think Tank” was set up on a broad basis, and consisted of representatives of users *and* suppliers of marketing information. There was a group of large, mostly internationally-operating clients. There were ICT-freaks, consultants, CEOs of the large Dutch research bureaus and of course there were representatives of the new information world, for they could make the difference in the future.

The purpose of this Think Tank was to map out the developments in the ICT- and other non-market-research sectors, and to make suggestions as to how other professions can support, stimulate and inspire our sector.

Partly on the basis of the results of this “think-tank” session, a number of important trends and developments in the information sector were mapped out, which could have great consequences for the information sector, not only in The Netherlands but all over the world.

If in this paper we speak of “newcomers”, then by that we mean agencies which generate information by means other than the usual market research methods. In this connection, one should think in terms of bureaus that engage in Web Analytics in all forms, of agencies that engage in Web Scraping, but also organizations that orient themselves towards the social media and organizations which generate information using smart IT applications, without the intervention of interviewers or questionnaires. In order to make the distinction, we shall, with respect, call the market research bureaus which draw their

information from the market by means of surveys the “traditional” bureaus.

Though the extensive study of the changing circumstances in the market was limited to the Netherlands, we believe that the trends and developments described in this paper are not merely apparent in the Netherlands. The study included many firms which operate internationally such as Heineken, Sanoma, Grolsch, Vodafone and Cisco. In addition, a number of board members from large multinationals were involved in the research. That is why we believe that what was revealed about developments in the sector in the Netherlands covers much more than just the Dutch!

#### What Trends, developments and observations can we distinguish?

- “Newcomers” do not feel themselves to be market research bureaus

As already stated in the introduction, among the clients the information need as regards the “what and how many” question is partly shifting from the traditional market research bureaus to the newcomers in the information sector. These newcomers do not usually have a “market research” label. In general, they have the idea that they do not belong in the research world at all. They offer solutions for all sorts of questions that clients have, and usually do so in the form of standard services. Many of these services are ICT-related and/or web-based. Many of these newcomers supply directly to the marketing, communication and CRM/Sales departments within an organization, and pass over the market researcher in this process. As a result, a splintering of information occurs, information may be purchased twice over, the transparency of the information is limited and there is no longer any question of an integrated information approach. In brief, the quantitatively-oriented newcomers generally orient themselves towards the “What” or “How many” question, and hardly if at all towards the “Why” question. And moreover they do not see themselves as ‘traditional’ research bureaus!

- Explosion of data

There are many new entrants to the information market. These are not confined to the “Web Scrapers” and Web Analysts. Also, or perhaps in particular, one must think of organizations that are active in an entirely different business, and retain information as a ‘by-product’. As an example, TomTom is one of the largest worldwide organizations in the field of navigation equipment; that is their core business. But as a residue, in addition to their core business, they have a pile of information about consumer behaviour, which, sooner or later, will be commercialized. TomTom knows where we are in our cars, what journeys we make, how often and where the traffic is at a standstill, how fast people drive, etc. – information which for very many organizations is exceptionally valuable. But then what about Vodafone?

Vodafone knows who we call, how often; they know which suppliers the consumer calls, etc. However, a large retailer such as Albert Heijn also knows what we buy and how often. ABN-AMRO, a large Dutch bank, recently introduced ‘the personal financial statement’. In it, all expenditures are classified for purposes of convenient household finance bookkeeping. They have with gathered with this in potential great knowledge about consumer behaviour and it is only a matter of time before these organizations aggregate this data into useable, accessible information, in order to supply it to the government and/or other interested parties.

Besides that, there are the Social Media such as Facebook and Google which have a great deal of information at their disposal. Much of this data is not (yet) offered for sale commercially, and if that does happen, then generally no market researcher has been involved, let alone an analysis approach that is accepted within market research, or integration with other (traditional) information sources. But in this context, one must of

course also think of the innumerable blogs, communities and other digital social networks, where – solicited and unsolicited - all sorts of things are said and written. This Information is being opened up at a rapid tempo.

- Unfindability and unawareness of information suppliers

From the Think Tank session it further emerged that many customers or clients of the research bureaus have hardly any idea, if at all, of what is offered in terms of information services outside the traditional bureaus and channels. Naturally there are newcomers who are (good at) attracting attention and have thus become findable. But it is hardly possible to discover who their competitors are. There is no overview of ‘newcomers’ and there are no classifications for the information categories for these newcomers. The newcomers have no collective platform, no sector association or professional association that represents their interests. As a result, they also lack a “showcase” on the basis of which clients can get acquainted with the “alternative” information supply offered.

- Privacy-issues

The traditional market research bureaus consider the privacy of respondents or consumers to be of paramount importance. All this is based on nationally and internationally respected and approved codes of behavior, such as the ICC/ESOMAR International Code on Market and Social Research. Many newcomers are absolutely unaware of the fact that they are dealing with privacy-sensitive information, and that this information must thus be defined as vulnerable. The frequently-heard reasoning is, of course, the fact that it involves public information, which is usually findable on the public web. In the first instance, it is even denied that one is dealing with privacy-sensitive information. But because of all the IT connections resulting from the use of, for example, cookies, much

more is known about that consumer than that single text somewhere on a blog. If you tackle them about this, the newcomers have no idea how these issues should be dealt with. When explained, understanding does indeed arise as regards the possible dangers that lie in wait for these companies where the legislator is concerned, who, sooner or later, will come up with measures for protecting the privacy of the consumer. Hereby comes into play the fact that within the EU a sharp eye is kept on protecting the consumer's privacy! Because of this lack of knowledge, the traditional agencies too are running risks. They too make use of the web, of course, although they do adhere to collectively-agreed rules of play. But if Brussels is going to tackle the supposed abuses, that will then also have direct consequences for the traditional bureaus.

- Positioning of the new suppliers

Perhaps the most important observation made by the Think Tank concerns the fact that the new suppliers of information services do not feel themselves to be research agencies. Nor indeed do they feel themselves to be researchers in the traditional sense of the word. The Newcomers do not see themselves as data suppliers, but much more as interpreters, as suppliers of: consumer contacts, inspiration sources, innovations, customer-contacts and -understanding. The positioning of (most) of the traditional research bureaus is usually based on the supply of information and problem solutions, and fits in with the present subtitle of the MOA: Center for Marketing Intelligence & Research. The traditional researchers are mostly attribute-oriented: we do telephonic or online research; while the new suppliers are mostly identified in terms of the benefits and the possibilities for decision-making of the services offered.

In contrast to the newcomers, many traditional research companies sell the market research product as a tool for reducing the uncertainties in marketing decisions, and one is inclined mainly to point out the less positive results of a study for a client, rather than

the benefits. The newcomers have invested a great deal in sexy products that look good, are simple to operate and are usually standardized.

The differences between the traditional and the new suppliers of information can be summarized as follows (see table 1).

table 1

“Classic Information”		“New Information”
Distance (we observe)		Proximity (we stand alongside you)
Objective / representative		Subjective / relevant
Boring, difficult, chilly		Exciting, easy, fast, fun

- Shift from representative to relevant

As a result of the rise of the Social Media, a shift has also come about towards the use of data that have not been collected in accordance with traditional market research methods. Reports from blogs and communities are not representative according to the definitions of market research, but naturally cannot be ignored on account of the numbers alone. They are no less relevant as a result! Precisely because of the transparency of the information and knowledge about those who place that information on the web, the need to monitor the web is great. The fact that it does not concern a cross-section of your target group is of less importance in this context. Of greater importance is that – whether one wants it or not – the information on the web can create quite a stir and can directly influence consumer behavior. Naturally, representativity is not “dead”, but in the future we shall have to take into account the fact that both approaches will be employed alongside each other in our professional field.

- Transformation of companies

There is a perceptible trend concerning companies that reposition themselves around information and information technology. Good examples are IBM and VNU – companies which formerly were particularly driven by hardware and the publishing world, respectively, and which are increasingly concentrating on information. IBM recently took over SPSS too, and for these sorts of companies it has set up a separate software division.

Companies such as IBM and VNU hardly feel themselves related to (the activities of) the market research world, if at all, and they are not familiar with that world either. SPSS was a big sponsor of the MOA; since the takeover, that involvement has dropped to ZERO. And without recognition or a feeling of relatedness, similar companies will not be quick to join the existing platforms such as the market research sector associations, including the MOA, the ADM and the MRS.

From an article in a Dutch trade magazine of February 2011, we came across the following quotation about the future of market research by John Post, Technology Director of IBM Benelux:

*“A different sort of world is heading our way. All products, services, (online) behavior patterns, object movements and chemical processes will presently be recorded, measured and sampled by sensors, chips and cameras. This unbelievable pile of information must lead to actual behavior models that must be converted into intelligent service provision. We have to move towards a real-time analysis of the facts.”*

*Post takes us to Stockholm. Four years ago, the traffic in that city had become completely clogged-up. All taxis and buses have since then been equipped with GPS-*

*sensors and linked to traffic-lights, parking places and to the congestion of traffic streams. It will soon be possible to attach article classifications to this as well. Behavioral economics – knowing how people make choices and anticipating them – is, according to Post, the profession of the 21st century. Soon, if you drive along a street where there is a shop that has your favorite brand of jeans on special offer, and there is a parking space free, then you will get a signal.*

### Implicaties voor de toekomst van market Research

On the grounds of the above trends, developments and observations, the research world will have to make a choice: do we want to have the newcomers alongside us and thus expand our field of activity, or will we just stick to the old and familiar, and make no place for the newcomers? The Dutch research market has made its choice: in favor of an expansion of the sector's borders. We consider it as paramount importance for the market research industry that the 'newcomers' feel themselves represented by our industry! We therefore have decided to 'stretch' our mission and broaden our field of activities. The mission of the Dutch sector association was:

*The MOA aims to promote, develop and stimulate, in the broadest sense of the words, the quality of market- and policy-research, both nationally and internationally. In addition, the association protects the interests of respondents, users and suppliers of market- and policy-research. The MOA strives for a membership consisting of qualified researchers who are active in the business world, government and in research bureaus. Creating and sharing knowledge are central to this mission.*

On the basis of the previously-described trends, the above mission as a whole no longer

covers the current situation. Simply deciding that from now on you also want to make room for newcomers within the information sector is not nearly enough.

Using the Dutch situation, we shall go through the various aspects so as to provide a picture of how radical are the changes for all market research industries around the world.

- A different and new collective name must be found for the broadened field of activity of the information sector. In the Netherlands, the collective name is now: Marketing Intelligence & Research. If newcomers do not feel they are research bureaus and/or researchers, then the definition must be adjusted by means of a collective name which covers the field of activity of the newcomers. During the numerous discussions, the many suggestions for a new definition were mentioned, such as data-based business solutions, decisive business analytics, information-based business optimization, intelligence for optimal business performance. Ultimately, the following was decided on: *Information Based Decision Making & Marketing Research*. In fact, market research makes up a part of Information Based Decision Making, but it is good to use both terms in order to bring the old and new worlds together.
- The new information sources and the traditional market research sources should be linked to one another, in order to create an optimal field of activity. There is much need for this, among both clients and suppliers. The phrase ‘integration of information sources’ must become an essential part of the field of activities of the sector.
- The information as it comes from the traditional sources is usually validated on the basis of clearly-formulated quality requirements for market- and opinion research; in this context, one can think of the ISO quality standards, such as ISO 25252 for market research, and ISO 26362 for panels. These kinds of quality standards are

not available for the “new information sources”. The validation of the “new” information is exceptionally relevant to those suppliers and users. How good is the information which is being offered there? New quality requirements will need to be developed that cover the new field of activities.

- The current codes of behavior for market research are not sufficiently applicable to the newcomers. Therefore, one or more new codes of behavior will have to be developed which take account of other insights and thus no longer coincide with the applicable privacy regime within market research. In the future, the sector will supply data varying from representative samples, which are privacy-proof, to one-on-one information for commercial purposes, information which, of course, is not privacy proof.
- In the same way that new bureaus do not feel themselves to be market research bureaus, those that work for the newcomers naturally do not feel they are researchers. Mission statements, codes and quality standards must be more broadly defined and it will be necessary to work with concepts other than research.
- Externally-collected information is no longer solely of relevance here, but (certainly) also internally-available information, and the combination of internal and external data-sources. In market research, things were and are primarily oriented towards external data, with the internal side often not considered because it is not part of the research field. The sector will have to reconsider this as well.
- As regards the “newcomers”, we must develop and emphasize arguments that appeal to them, that stimulate and motivate them to become members of the sector associations within the information industry. There are three important reasons why it is important for newcomers to join the sector associations within the information industry; these are: protection of interests, regulations concerning privacy and the findability/traceability of the suppliers/newcomers and the

information they supply. In addition, the newcomers are not yet so aware of the importance of quality control and quality standards.

- The importance of the protection of interests recently became apparent in the Dutch parliament when the new cookie legislation was handled. Every provider that places cookies must obtain unequivocal consent from the consumer. An extensive information sector lobby, which included the newcomers, succeeded in having an exception included in the Dutch legislation for the newcomers and the traditional Dutch market research agencies. Due to the lobby organized by the MOA the Dutch parliament accepted that market research agencies (traditional and newcomers) do not need permission to place one or more cookies under the condition that these only provide aggregated data.
- In conclusion, it can be said that newcomers hardly, if at all, identify with the original mission formulated by the information sector, precisely because they do not feel themselves to be researchers, and do not wish to be either! If the industry doesn't want to alienate the newcomers immediately, then this fact will have to be taken into account. At the same time, the term 'market research' is very familiar to a large part of the current information providers. This activity will also have to remain recognizable in the definition in order to prevent us from alienating the existing traditional bureaus from the information sector.

### New Profile and adjusted Structure

From the analysis, it became clear that the original sector structure offers no place to the newcomers. Newcomers do not identify with the description, or with the objectives, and they experience no problems with privacy, codes of behavior, quality standards and findability. If on the grounds of the preceding observations the new information sector wishes to also be a platform for the newcomers, then the present sector must greatly change and adapt itself to the new situation, and do so without alienating the current

supporters of the information sector.

This calls for a different policy dealing with the following points:

- The names MOA, ADM, MRS, etc. must continue to exist, for the benefit of familiarity and trust within the information sector's existing market. The words "MarktOnderzoek", "Marktforschung" and "Market Research" in the MOA, ADM and MRS names can, however, no longer be retained and need to be removed from the names.
- Newcomers must be able to identify with the subtitle that the information sector will use. The subtitle of the sector must be modified from "market research" to "information based decision making".
- The field of activities must be reformulated in accordance with the basic principles as previously mentioned, with special attention being paid to the field of activities of the Information Based Decision Making sector. That field of activities runs from a sample of n= 1000, privacy proof at one end of the spectrum, to a 1-on-1 commercial non-privacy-proof relationship at the other end.
- For the creation of a showcase, in which the findability and recognizability of the new suppliers for the benefit of the clients is the basic principle, an output matrix of data sources, data-forms and data-suppliers will have to be developed. In doing so, care will have to be taken that the existing bureaus also identify with it and are able to maintain their place. The point of departure as regards the findability is that the output, which must be very recognizable for clients, will also be relevant, exciting, fast, convenient and fun. A good market-place will be an important commercial reason for the newcomers to become members of the 'new' sector association. This will make the investment in membership of this sector association worthwhile commercially.

- In addition, of course, the traditional classifications will have to continue to be borne in mind, as they applied until very recently. These, however, are much more attribute-oriented, telephone and online research, etc., and hardly oriented towards the benefits or solutions. Their preservation is essential in order not to alienate the traditional agencies from the MOA.
- The structure of the present sector associations is based on market research bureaus. This bureau structure must be adapted to a new output-related classification of the sector. The sector association of the future must be the showcase for the information sector, in which the client can easily find his/her way, in which links between the sources can be made, and in which data-integration and data-transparency become clear. The sector will have to take the new bureaus into account, the so-called NON-Survey Based bureaus, which must function alongside the Survey Based bureaus section. Such a new section, with its own management and own representation in the Council, will start promoting the interests of this group of bureaus. In this context, one could be thinking in terms of questions such as how to deal with privacy and quality standards. This promotion of their interests, in addition to the previously-mentioned showcase, will have to be the second important reason for joining the information sector.
- In addition to a Non-Survey Based agencies section, education must also be a focus of attention. There is a large group of lecturers from universities and colleges of higher education involved in the information sector. Lessons are given in this field of study, exams are taken and many internships are available annually in the information sector. Together with educators, a structure and a curriculum must be developed in which the new information streams are given ample coverage.
- Furthermore, the information sector will need to adjust the range of activities it offers to the altered profile and the new structure of the information sector. That means concrete adjustments in, such as:

- The range of courses offered by the sector association;
- The range offered in the themed afternoons must be adjusted to the new demands of the sector;
- Many sector associations in the information industry award prizes to the most distinctive market research bureau and also to the distinctive researcher. An adjustment to the sector prizes, with prizes also going to the Web 3.0 Newcomers, will be needed; The content and the profile of the trade magazines focusing on the information sector will have to be redefined;
- Scientific articles about and research into the developments within the profession must be made to fit in with the new reality;
- The present compliance system in relation to complaints about quality of information and the ethics of the profession must be revised; new codes of behavior and new “ISO” norms are necessary for this, and must be embedded in the regulations of the Conciliation Board and the Supervisory Board. It will also be necessary to consider a complaints desk for consumers who feel that their privacy has been violated;
- The definition of our new field of activities naturally also influences the size of the market. An expansion of the field of activities will lead to an increased – and in particular too, a *different* – turnover that will have to be measured and rendered measurable.

#### De Nadere uitwerking van de gevonden uitkomsten en conclusies

The implementation of the strategic restructuring within the information sector as we have described it should ideally take place in three phases. The first phase focuses on the making of an inventory of the newcomers and categorizing them. In the second phase, the execution of the first phase must take place, and the emphasis will lie on self-regulation

and quality criteria. In the third phase, the information sector will have to spotlight its modified mission, profile and structure to all stakeholders involved.

De eerste inventarisatie fase werd afgerond in het eerste kwartaal 2011. Daarop aansluitend werd er een taskforce samengesteld bestaande uit zowel representanten uit de “oude” wereld als de zogenaamde newcomers. Deze taskforce kreeg de onderstaande opdracht:

*De taskforce wordt gevraagd te komen met voorstellen aangaande richtlijnen voor kwalitatief goed SMR alsmede een voorzet te geven voor een gedragscode die voor deze vorm van dataverzameling relevant is.*

*Op welke wijze kan goed SMR worden onderscheiden? Kunnen (sommige) richtlijnen voor marktonderzoek worden overgenomen en welke extra richtlijnen zijn nodig. Te denken valt aan richtlijnen rondom:*

*Veiligheid/ Dataopslag*

*Privacy/ Anonimiteit*

*Methodiek*

*Transparantie*

*Interpretatie*

Medio november 2011 presenteerde de taskforce haar eindverslag aan het bestuur van de MOA. Daarin beschreef zij een tiental cases, welke in bijlage 2 zijn opgenomen. De inzichten die deze cases opleverden waren voor de Nederlandse situatie verrassend en schokkend. Om die reddend nemen wij de conclusie van de taskforce verkort over in dit artikel.

### Conclusie Taskforce:

De nieuwe vormen van datacollectie, waar de opdrachtbeschrijving van de Taskforce op is gebaseerd, zijn geconcentreerd in het kwadrant: passieve datacollectie zonder toestemming van de consument.(zie bijlage 1) De overige vormen van datacollectie t.b.v. marktonderzoek bevinden zich in de kwadranten, waarbij altijd sprake is van toestemming van de consument en met die toestemming is er geen probleem voor de dataverzameling en datarapportage richting opdrachtgever.

Indien er geen actieve toestemming is van de consument is de materie complexer. Hierbij moet vooral gedacht worden aan de social media en de informatie op Twitter. Voor de Nederlandse situatie bleek dat de wetgever reeds voorziet in het gebruik van privacy gevoelige informatie uit de social media. Zonder toestemming van de betreffende consument is het in Nederland niet toegestaan die informatie op een identificeerbare vorm te gebruiken voor welke doeleinden dan ook, inclusief marktonderzoek.

Kernpunten in de Nederlandse wetgeving zijn:

- Ongevraagd opgenomen worden in een database is zonder informatie aan en toestemming van de consument wettelijk niet toegestaan
- Ongevraagd benaderd worden, op welke gronden dan ook, op basis van informatie uit de social media is wettelijk niet toegestaan. Met uitzondering van Twitter.

De werkwijze die op grond van de Nederlandse wetgeving gemeengoed zou moeten zijn, blijkt in de praktijk met voeten te worden getreden. Er wordt volop één op één

gerapporteerd zonder toestemming van de consument, adressen worden zonder ondubbelzinnige toestemming in databases opgeslagen en er vinden commerciële acties plaats op de e-mail adressen zonder dat de consument daarover geïnformeerd is en toestemming voor heeft gegeven.

Op grond van de bevindingen van de Taskforce zijn er geen nieuwe gedragscodes of kwaliteitstandaarden noodzakelijk, voor zover het het privacy proof gedeelte van de Social Media betreft. Dit zijn dus de situaties waarin de consument/respondent geïnformeerd is over en toestemming heeft gegeven voor het gebruik van zijn informatie vanuit de social media. De bestaande gedragscodes en kwaliteitsnormen, zoals onder andere beschreven in ISO 20252, voldoen in deze situatie prima. De consequentie van het één en ander is dat als er geen toestemming is verleend door de consument onderzoekbureaus andere (wettelijke)regels moeten naleven, namelijk die van de Direct Marketing. De schrijvers van dit artikel hebben geen research gedaan in andere (Europese) landen die ieder hun eigen wettelijke regime hebben. Toch wordt verondersteld dat het voor de hand ligt dat bovenstaande bevindingen met betrekking tot de Nederlandse situatie niet uniek zullen blijken te zijn voor een groot gedeelte van westerse wereld.

## STRATEGISCHE KEUZES EN AANBEVELINGEN

Het ten onrechte gebruiken van privacy gevoelige informatie voor commerciële doeleinden zal vroeg of laat en waarschijnlijk eerder vroeger dan later, door de toezichthouders worden aangepakt en wellicht gevolgd worden door (nog)

strengere wettelijk beperkingen van het gebruik van en de toepassingen op het net en dus de data die daarop staat. De marketing Intelligence sector zal aan de wetgever duidelijk moeten maken dat de Marktonderzoek branche op een zuivere manier met de privacy gevoelige webdata wil omgaan. Deze benadering is geen defensieve benadering maar juist een offensieve om nieuwe regelgeving op dit terrein voor onze sector de wind uit de zeilen te nemen.

Om die reden heeft de MOA een drietal strategische uitgangspunten geformuleerd:

- Informatie gebaseerd op het kwadrant passieve datacollectie zonder toestemming van de consument zal volgens de geldende marktonderzoek gedragscodes worden benaderd, dus anoniem en niet herleidbaar tot individuen. Consolideren van de bestaande status van het marktonderzoek en deze actief promoten onder de newcomers.
- De branche moet zich gaan inzetten om daar waar toestemming van de consument voor het gebruik van zijn publiek geposte informatie ontbreekt, terwijl die wel van toegevoegde (commerciële) waarde is voor de opdrachtgever, de consument in de gelegenheid wordt gesteld via een opt-in icoon, de volgers toestemming te geven voor het gebruik van de vrijwillig geplaatste informatie. Een dergelijk icoon hoeft slechts eenmalig aangezet te worden. De medewerking van de sociale netwerken, zoals Facebook is hiervoor noodzakelijk. Door de geldende wettelijke beperkingen is een opt-out benadering in Nederland niet mogelijk.
- Een lobby bij de wetgever moet misbruik van data voorkomen en sociale netwerken verplichten mee te werken aan een opt-in icoon voor consumenten.
- De branche moet haar verantwoordelijkheid nemen en de opdrachtgevers die de informatie van het web willen inzien en eventuele actief willen gebruiken voor

commerciële doeleinden, te wijzen op de wettelijke beperkingen van het gebruik van die publiekelijke data.

### in conclusion

There are many indications that it is only a question of time before Brussels will come up with its own directives in order to subject scrapers and web-analysts, those who employ the social media and other ICT-type observation tools, to strict privacy rules. When that happens, the research industry must be ready to convince the legislators in Brussels and at the national level that existing self-regulation makes new legislation for the Information Based Decision Making Business superfluous. This would be analogous to the present legal regime, in which an exception has also been made for market research within the law.

And with that, the circle is complete. There is worldwide a new field of activity for the Information Business which is future proof, which is able to stand up for itself against other suppliers and which can give the right answer to both strategic questions and to the “What” and “How many” questions.

Information Based Decision Making is what we were doing and shall continue to do, but with adjusted rules of play.

the authorS

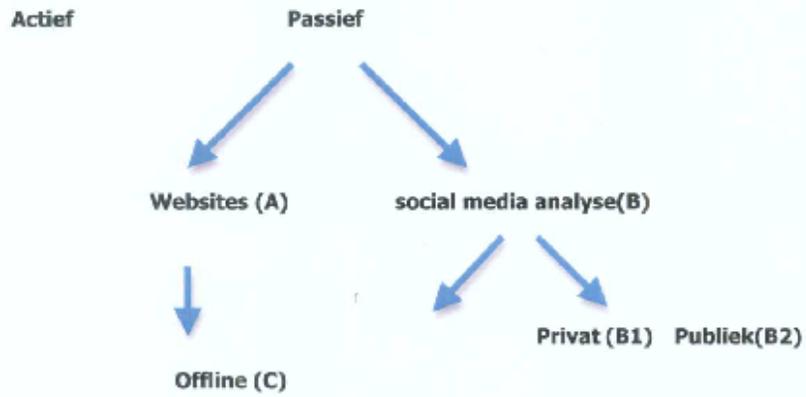
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Pieter Paul Verheggen is Chairman, MOA, Netherlands, CEO of

Motivaction,Netherlands.

Bijlage 1 schema passieve/actieve dataverzameling versus met en zonder toestemming

SCHEMA 1.



SCHEMA 2.

