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Poland's Opinion and Market Research Industry

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The market and opinion research industry in Poland emerged as a separate, organised area of business as a result of the radical economic and political transformations of 1989. During the socialist era, Poland had two survey centres (OBOP – Ośrodek Badania Opinii Publicznej, currently TNS OBOP, established in 1958, and CBOS – Centrum Badania Opinii Społecznej operating since 1982) and social research was conducted by scientific institutions and academic centres. Under this system, there was no room for market research, notably consumer research in the contemporary meaning of the term. While historians of the industry provide examples of such studies conducted for state-owned industrial companies under communism, those efforts were small scale and of little impact on corporate decision-making. In a shortage economy with little emphasis on the production of consumer goods, there was little emphasis on consumer market research.The majority of active opinion and market research firms were established in the first years following 1989, a period that saw an unparalleled explosion of entrepreneurship (see Table 1). The vast majority of companies set up during that time were closely linked to academic social research as most owners and managers were either academics or young social sciences graduates. During this truly pioneering period of the research industry, companies whose main assets were knowledge and founders' enthusiasm, set up their businesses in modest offices, without major investments or technical facilities. Owing much to the newfound hunger for market and opinion research in post-communist Poland, in a short while they solicited serious business from major clients.

Key words: market and opinion research industry, consumer market research

Table 1 Ranking of selected research companies by sales generated in 2009

No.	Company	2009 Sales (PLN)	Operating in Poland since:
1	MillwardBrown SMG/KRC	102,355,610.35	1990
2	ACNielsen Polska	75,924,670.78	1992
3	GfK Polonia	65,309,987.79	1990
4	Grupa PENTOR	44,781,866.65	1991
5	TNS OBOP	42,314,858.71	1958
6	Grupa IPSOS	40,152,954.69	1991
7	PBS DGA	23,239,314.58	1990
8	Grupa IQS	22,403,698.29	1994
9	AGB Nielsen Media Research	20,331,423.66	1996
10	MEMRB International Poland	16,497,791.99	1991
11	Synovate	15,426,676.41	1991
12	4P research mix	12,618,436.06	2003
13	ARC Rynek i Opinia	10,007,824.38	1992
14	Sequence HC Partners	5,550,775.42	2002
15	IMAS International	4,402,028.88	1994
16	ABR SESTA	4,267,813.59	1996
17	ALMARES Instytut Doradztwa i Badań Rynku	2,844,699.69	1995
18	CBM INDICATOR	2,684,461.34	1990
19	Fundacja CBOS	2,385,255.62	1982
20	Public Profits	1,975,982.90	1996
	Total audited turnover	515,476,131.78	

Source: OFBOR; websites of companies listed

Today's research market in Poland exhibits two main features: it is stable and competitive. Stability is reflected in that, over the years, market players largely retained their market shares. The annual shifts, reflected in the annual sales ranking of research firms (see Table 1), are fairly insignificant, with hardly any new players entering the market (at least ones whose scale of operations would be comparable to that of existing companies). It seems that the global players interested in the Polish market also entered it at a fairly early stage. There are hardly any new industry investors or any other major players interested in developing research services. The market is dominated by foreign-owned companies and ownership changes occur mostly through global mergers and acquisitions, with some major firms Polish owned.

According to estimates, the entire research market in 2009 was worth over PLN 600,000,000 (ca. EUR 150,000,000); this is tremendous growth, as in 2000 its value was estimated at almost half that (PLN 306,000,000 or over EUR 75,000).

Within the stable market is fierce competition, especially during downward economic trends. In Poland the market is client-driven, and virtually all firms position themselves as full service companies who offer a comprehensive set of research services. Research companies try to outdo one another by offering ever more advanced solutions and greater flexibility in meeting the expectations of commercial clients. The tendency of the major firms toward a holistic approach differentiates the Polish market from Western Europe, notably Germany and the United Kingdom, where some firms have narrow, niche positioning. While only a handful of Polish firms specialize in specific research methods or domains, as Poland's economy grows and imitates their Western neighbours, a specialisation trend may emerge.

Despite stiff competition, Poland's research industry is characterised by high degree of collaboration, focused on industry standards and adherence to fair play rules between competitors. This is mainly the result of sharing the same values by the key market players, with strong commitment to academic background. It is those features that have contributed to the success of industry organisations.

OFBOR – THE POLISH ASSOCIATION OF PUBLIC OPINION AND MARKETING RESEARCH FIRMS

The pioneering period in the history of Poland's research industry was crowned in 1997 when its employers formed the Polish Association of Public Opinion and Marketing Research Firms (Polish name: Organizacja Firm Badania Opinii i Rynku, acronym: OFBOR), now with 22 research firms as its members. The statutory goal of OFBOR is to work towards promoting public confidence in research, to develop and promote ethical standards and good practices while raising the profile of the industry as a whole. The Association has an impressive track record in all of those areas, achieved through a number of programmes and initiatives, particularly in recent years, including the nation-wide Congress of Market and Opinion Researchers (co-organised with PTBRiO, the Polish Society of Market and Opinion Researchers), the Interviewing Quality Control Programme (PKJPA), the financial audit of the industry, Young Researcher Contest, and the 'Your Opinion Matters' Programme.

The annual Congress of Market and Opinion Researchers (Kongres Badaczy Rynku i Opinii) deserves special attention. Now in its eleventh year, it is Poland's largest event of the marketing, media and research industry and one of the major events of this type across Europe, each time attracting over 600 participants. The Congress is a meeting place for research firms operating in Poland, which exchange experience and present their best work. Congress presentations are carefully selected from a large pool of submitted proposals to guarantee high quality of their content. The Congress also offers keynote speeches by international guests and experts not directly associated with the research industry.

While the annual Congress can be seen as a celebration of the research industry in Poland, the Interviewing Quality Control Programme (Program Kontroli Jakości Pracy Ankieterów, PKJPA) directly concerns day-to-day operations of fieldwork departments in research firms. Modelled after British solutions to fieldwork issues, the PKJPA is the main initiative of OFBOR, promoting fieldwork quality standards in market and opinion research in areas such as organisation of fieldwork departments and field networks, recruitment and training of interviewers and co-ordinators, supervision and co-ordination as well as follow-up control. Any research provider is welcome to join the Programme, including members and non-members of OFBOR. At present, a total of 36 firms have subjected themselves to scrutiny under the Programme. Those which successfully pass the PKJPA audit receive certificates in eight categories (PAPI, CATI, CAPI, CAWI, qualitative research, self-administered studies, retail audit and mystery shopping). Certificates are valid for one year and guarantee that the holder meets the Programme requirements.

The annual financial audit of Poland's marketing research industry was initiated in 2000. Conducted by an independent auditor, it examines revenues from sales of research services. This approach ensures reliability and comparability of data and coverage of cash transfers between affiliated companies within the same group, to make sure that the reported revenues have, indeed, been earned from research services. The financial audit covers members and non-members of OFBOR. Based on the sales revenues criterion, a ranking of research firms has been published for 10 years. The ranking can be used to analyse trends and estimate the total worth of the research market.

OFBOR is also working toward raising the profile of research among respondents as well as students (the latter being prospective researchers). 'Your Opinion Matters' (*Twoja Opinia Ma Znaczenie*) is a programme that targets the respondents, aiming to improve response rates and enhance public confidence in market and opinion research. It seeks to explain the role of research in modern-day society and economy, and to motivate Poles to take part in research by illustrating the impact of research results on the surrounding world.

Regarding students, OFBOR invites students majoring in research-related fields to take part in the Young Researcher Contest (*Konkurs Młodych Badaczy*) and the zbadaj.to (study.it) competition (co-organised by PTBRiO). Both initiatives seek to promote the research industry as an employment option for university/college students. Under the Young Researcher Contest awards are granted to the best master's theses which use research or cover research topics. The latter competition offers research workshops and traineeship opportunities in research firms.

OFBOR also responds to current events and phenomena that impact research in the public domain. After the 2010 presidential elections in Poland, when actual voting results were different from figures obtained from some surveys/exit polls, OFBOR initiated an independent Committee to assess the pre-election surveying methodology. The Committee, chaired by Professor Henryk Domański, the Head of the Institute of Philosophy and Sociology, Polish Academy of Sciences, produced a report, analysing the scale and reasons behind the electoral discrepancies.

Apart from the aforementioned programmes and initiatives, OFBOR also builds a platform for a debate on the condition of the research industry and the challenges posed by the market and by public life in general.

THE CHALLENGES OF MARKET AND PUBLIC DEBATE

Currently, Polish research companies are offering consultancy services, which present its own unique set of challenges. Discussions within the researcher community about industry-related topics tend to reach the same conclusion: research firms should play the role of a consultant and advisor rather than just a data provider. For many years the research community pursued its aspirations to genuine business consultancy, which offers specific solutions to corporate problems, shares responsibility and, of course, charges a higher service fee. However, this plan did not really work out, due to structural problems: on the one hand, research firms lacked sufficient competencies and, on the other, clients were reluctant to share all details of their business with researchers.

Today's sound intellectual standing of Poland's research industry, well illustrated by presentations delivered at the annual Congress, seems to justify its efforts to establish itself as consumer consulting experts, relying on unique competencies held only by research companies. Attempts to find such expertise among business consultancies, focused on economic and organisational aspects of business, are futile. Contrary to what it might seem, such expertise is not found in advertising agencies, either, as their mission is to create reality rather than to systematically analyse it. Given its different time horizon, academic research also has a limited ability to capture the most recent trends. In fact, research companies are the only category of organisations which accumulate and develop knowledge on consumption and consumers, track and understand the most recent phenomena and monitor the fast-changing daily life in the country. Equally as important, the research industry can act in this capacity from positions which are not biased by commercial or persuasive interests. This aspect cannot be overestimated given the growing need to structure the large amount of information and, above all, to understand the transformations in customs, habits and lifestyles.

What does ‘consumer consulting’ mean in practice? Put simply, it stands for competent understanding of behaviours, preferences and lifestyles of various consumer categories, as captured through research. It also means the ability to see those phenomena against a broader background, and the readiness to comment on them for the purposes of clients’ marketing, without pretending to provide strategic consulting but also without exaggerated research scholasticism. In fact, all the research industry needs to capitalise on this unique competence is to communicate it more boldly to clients. On various occasions, researchers complain that their insights are not sufficiently appreciated by the outside world. However, the outside world does not always know that it can approach a research company and receive more than just colourful charts and complex matrices. The ‘fancy stuff’ of attractively presented and cleverly worded conclusions is usually provided by industries other than research.

In the domain of public opinion research the industry faces problems of different but equally challenging nature. Oftentimes the media orders a political preference survey, which is cheap and something any reasonably competent firm can do. The media likes these surveys because they can be conducted overnight and announced almost like the weather forecast. With fierce market competition, the political preference survey – which has become the daily bread of surveying during election campaigns – has become a race preferring speed over quality. These surveys have long become quick-fix, cheap services, with all consequences of this fact.

Presenting survey results in a sensational context or even as part of political canvassing poses a genuine problem for research firms. For a long time now, media players, commentators and politicians use opinion poll results as a battle cry and often embed them into media campaigns and political crusades. In short, surveys have been deprived of their crucial attribute of impartiality, despite the intents and efforts various research firms have undertaken against such outcome. Survey charts as a weapon in the war between ‘liberal Poland’ and ‘Solidarity-based Poland’ (to take two recent political buzzwords) have unsettled the trusting relationship between respondents and pollsters. Respondents are increasingly viewed as agents of one camp in this information war and, consequently, responses follow the logic of misinformation rather than dispassionate honesty. Supporters of the “wrong” political candidates have been stigmatized, rather than be treated as those with a respectable point-of-view. Our survey respondents pick up such signals, and start having problems with disclosing their true preferences to the interviewer. Detrimental for the reliability of data, respondents would opt for ‘not sure’ or ‘don’t know’ when the parties or candidates who seem to be favoured by the media are mentioned.

Meanwhile, the role of a surveying centre is essentially to take the respondent’s side, and to build an atmosphere of trust and impartiality in a research situation.

This is becoming more and more difficult, because surveys are perceived as an element in the 'cultural war' in the media, rather than an independent source of knowledge on citizens' opinions. However, this source is very important: anyone who reads the daily news without referring to public opinion will have inaccurate information. Therefore, it seems that the key task for public opinion researchers is to restore surveys to their status of impartial source of knowledge on views held by the public.

Any discussion of challenges the Polish research industry is facing should also draw attention to another sensitive element: the interviewer. This occupational role is going through difficult times, caused by transformations of the social structure and the labour market. The expanding palette of occupational options offers new opportunities to those who previously worked as interviewers. The difficulties involved in reaching the respondent, the social perceptions likening interviewers with door-to-door salesmen, the ever-increasing demands from research firms, and the place of interviewing on the new map of ambitions and prestige – none of these factors seems conducive to people opting for an interviewer career. The occupation has not been taken up by immigrants, ready to withstand the challenges of the job, and is less favoured by students, compared to 1990's as well as to other part time jobs. It is generally performed as a temporary job, and easily abandoned when more stable employment prospects appear. On the other hand, the topics covered by research (often specialised, and studied in-depth), the ever increasing fieldwork standards (such as the aforementioned Interviewing Quality Control Programme), and clients' growing expectations require well-trained and experienced interviewers.

Regardless of the problems outlined here, Poland's research industry is in a good intellectual and organisational shape, providing its clients and the broad public with up-to-date insights and knowledge on consumption, lifestyles, preferences and values of contemporary Poles. This can be experienced every year during the Congress, which has became one of the best sources of information for sociologists, ethnologists and journalists interested in rapid changes of the society. The challenge to track and explain this on-going transition is faced every day by market researchers. The profession seems to be an attractive choice for young and ambitious graduates, ready to face this challenge in the future.

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