

LOOKING FOR B2B RESEARCH PARTNERS IN LATIN AMERICA

EXPERIENCES FROM CONSTRUCTION, AGRICULTURAL AND HEALTHCARE SECTORS

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INTRODUCTION

Latin America is a region, strategically vital for leading global manufacturers in various industries, including Healthcare, Agriculture and Construction and Mining sectors. This is also a region with high potential for B2B marketing research. Yet, the continuous volatile political and economic situation in the region, unfavorable regional image in the eyes of opinion leaders from outside of the region, coupled with the added complexity of many B2B research projects, result in a gap between potential and actual B2B market research volumes in many countries of the Latin America region.

This paper provides an overview of the region's performance and potential (compared to other regions) for three B2B sectors, and describes hands-on experiences of three research agencies, commissioning B2B projects in the region. We focus on concerns and issues we've encountered while conducting work in Latin America, and share practical solutions and advantages, resulting from a close cooperation between the commissioning agency and a local supplier.

LATIN AMERICA IN GLOBAL AND B2B RESEARCH

According to the Global MR Report (2016) by ESOMAR, Latin America accounts for about 4% of all global research turnover, B2C and B2B (totaling nearly \$2 bn in 2015). If we only focus on the B2B sub-segment, Latin America accounts for approximately 3% of the volume. The share of the region, thus, is consistently low for consumer and business research projects. In the following section, we are set to review if this trend holds true for a sub-set of industries, representing the core volume for the B2B research.

Not many agencies have chosen business-to-business research as their core competency. Those that did, typically do not service a variety of B2B industries. Instead, they focus on three to five B2B segments, and develop a specialized expertise in each. Compared to the consumer research, B2B studies require more recruitment effort and are typically more time consuming. Project set-up stage is complicated, more consideration needed to land on the appropriate yet feasible research techniques to answer the research questions of a B2B client. Finding the purchase decision-makers and the influencers, persuading them to participate in research, providing a guarantee of confidentiality are crucial for a successful B2B project, and can be a difficult task for a market researcher. While B2B research covers many industries (see figure 1), the added complexity of these projects is a characteristic shared by all the industries.

FIGURE 1. B2B RESEARCH INDUSTRIES

- Agriculture/ Agribusiness
- Automotive
- Automotive aftermarket
- Chemical industry
- Finance
- Healthcare/ medical
- High technology
- IT
- Manufacturing/ Machinery
- Media
- Oil&Gas/ Oil products
- Utilities/ Energy

Source: <https://www.greenbook.org/>

The authors of this paper work in research agencies with specific focus on one or two B2B sectors. Each of these sectors contributes strongly to the total B2B research volume – Healthcare, Construction/Mining, and Agriculture. In the following section, we will take a closer look on each of these three sectors, review the manufacturers which drive each segment, and explore the role that Latin American region plays in the global turnover for these key segment players, with the goal to estimate the growth potential for B2B research volume in the region.

LATIN AMERICA IN HEALTHCARE, CONSTRUCTION AND AGRICULTURAL SECTORS

Healthcare

If we take an industry-wide perspective, Latin America is an important source of sales revenue and growth potential for healthcare. According to the Global Healthcare Industry Outlook (Frost&Sullivan, 2016), the share of sales into Latin America in pharmaceuticals and biotechnology is 8%, and 7% in the medical imaging segment. On the company level, leading producers recognize Latin America's potential: Abbott reports that Latin America accounts for 32% of its consolidated sales in emerging markets; for Sanofi and Novartis, sales to Latin America account for about 9% (Abbott Annual Report, 2015; Novartis Annual Report, 2015; Sanofi Annual Report, 2015). According to Frost & Sullivan's Vision 2025 – The Future of Healthcare - report, Latin America's demand for private healthcare services, driven by more diverse workplace and more women as decision-makers, could unlock \$1 trillion for Latin America's GDP by 2025.

Construction and mining

Latin America is a vital region for the industry, rich in resources, with many large-scale construction projects. The region hosts leading companies in mining: Vale (iron ore, Brazil, \$26 bn), Codelco (copper, Chile, \$12 bn), Grupo Mexico (copper, Mexico, \$5 bn).

Prominent construction and mining equipment manufacturers continue to move production into the region. Yet, many construction and mining producers saw a decline in the sales since 2012. They explain the drop in sales/revenues by economic situation in the region. Table 1 shows the trends in construction equipment industry: while some manufacturers see a decline in the share of Latin America's sales in their global turnover, others have relatively stable position in the region. Average share across the selected manufacturers for the period of 2012 to 2015 rounds up to 11%.

TABLE 1. SHARE OF SALES IN LATIN AMERICA, % OF GLOBAL SALES FOR EACH MANUFACTURER

Manufacturer	Description	2012	2013	2014	2015
Atlas Copco ¹	Industrial productivity enhancement equipment, air compressors, drilling, demolition tools	10	10	9	8
Caterpillar ²	Construction and mining equipment	14	15	13	9
Komatsu ³	Construction and mining equipment	13	15	15	15
Volvo ⁴	Trucks, buses, construction and mining equipment	10	11	10	5

Source: *Atlas Copco, Caterpillar, Komatsu, Volvo Annual reports 2012–2015*

1. Atslas Copco Annual Reports 2012 – 2015
2. Caterpillar Annual Reports 2012 – 2015
3. Komatsu Annual Reports 2012 – 2015
4. Volvo Annual Report 2012 – 2015

Despite the decay, manufacturers consider the region of Latin America strategically important. Brazil is the largest market in Latin and/or South America for most of them. Despite a continued sales decrease forecasted for Brazil, manufacturers do not plan any significant salesforce reductions or a reduced footprint in the region (Atlas Copco, Caterpillar, Komatsu, Volvo Annual reports 2012-2015)

Agriculture and agri-industrial

In Agricultural and Agri-industrial sectors, Latin America represents the major growth driver for the industry. Latin America and the Caribbean contribute 11% of the value of the world food production and represent 24% of the world's arable lands (World Bank Statistics and IDB).

The region's potential in crop and animal sectors is growing quickly. In the crop sector, Latin America and the Caribbean is currently the third leading region in agricultural land with this indicator growing during the last three years (World Development Indicators). Brazil, Argentina, Paraguay, and Uruguay have recently increased significantly the world's supply of wheat, corn, and soybeans and have doubled grain production between 1970 and 2010. (FAO, "World agriculture: towards 2030-2050").

According to the Food and Agriculture Organization of the United Nations (FAO), crop protection market grew by around 13% in 2014, the highest growth over all continents of the world (FAO, World Agriculture: Towards 2030-2050). This attracts crop protection and seed companies. For example, 17% of Syngenta's workforce is located in Latin America, and the region accounts for 27% of annual sales, with a high demand both for product solutions and agronomic advice (Syngenta Annual Report, 2015).

Latin America plays an important role in the animal sector, too. The region produces 23% of beef and buffalo meat and 21% of poultry, 10% of eggs and 11% of milk. The livestock sector in Latin America has grown at an annual rate of 4%, which is higher than the average global growth rate (2%). In the last five years Brazil has been the largest exporter of cattle meat in the world. One in each five pounds of commercialized cattle meat is from Brazil, the country which is also the world's fourth biggest producer of pig meat, with 3% of the total world production (FAO, 2012). The situation offers enormous opportunities for animal health companies to enter the animal healthcare market in this country.

Based on the brief overview above, Latin America is seen as a strategically vital market for B2B global manufacturers across multiple industries, with current strong sales into the region, as well as high projected growth rates. For the reviewed sectors, the region's share in global companies is in the realm of 7% to 27%, which is well beyond the 3% share of the region in global B2B MR.

RESEARCH TRENDS AND MACROECONOMIC TRENDS, COUNTRY-LEVEL

Like many other industries, marketing research industry is influenced by the financial and economic performance of a region. We will now take a closer look at the recent economic, investment and research turnover trends for specific companies in the region.

Brazil is the largest research market in Latin America. It has been keeping this position for the recent five years, followed by Mexico, but both countries' shares in MR have reduced since 2013. We have listed the countries which form the Latin American region, in the order of the total GDP volume in 2015, from highest to lowest (table 2). In the table, we also plot index dynamics (increase or decrease) for each country's GDP, foreign direct investment, and the marketing research turnover.

TABLE 2. CHANGE IN RESEARCH TURNOVER, GDP AND FOREIGN INVESTMENTS IN LATIN AMERICA IN 2013-2015

Country	GDP ¹	Foreign direct investment, net inflows (% of GDP) ²	Research turnover ³
Brazil	↘	↗	↘
Mexico	↘	↘	↘
Argentina	↗	↗	↘
Colombia	↘	↘	↘
Dominican Republic	↗	↗	→
Guatemala	↗	↘	↗
Costa Rica	↗	↘	→
Uruguay	↘	↘	→
Panama	↗	↗	→
Paraguay	↘	↗	→
El Salvador	↗	↗	→
Honduras	↗	↗	→
Nicaragua	↗	↘	→
Venezuela	↗	No data	↗

Sources: ESOMAR GMR 2014, GMR 2016, International Monetary Fund World Economic Outlook Database October 2016 and World Bank data

1. World bank

2. International Monetary Fund World Economic Outlook Database October 2016

3. ESOMAR GMR 2014, GMR 2016

While the table reveals a growth trend in GDP and in FDI for a number of countries, the upward change in the research turnover was only seen in Guatemala and Venezuela, while other countries showed reduction or no change in the turnover volume. One explanation could be that the research turnover is a lagging indicator, with a delayed sensitivity to macro-economic trends.

The gap

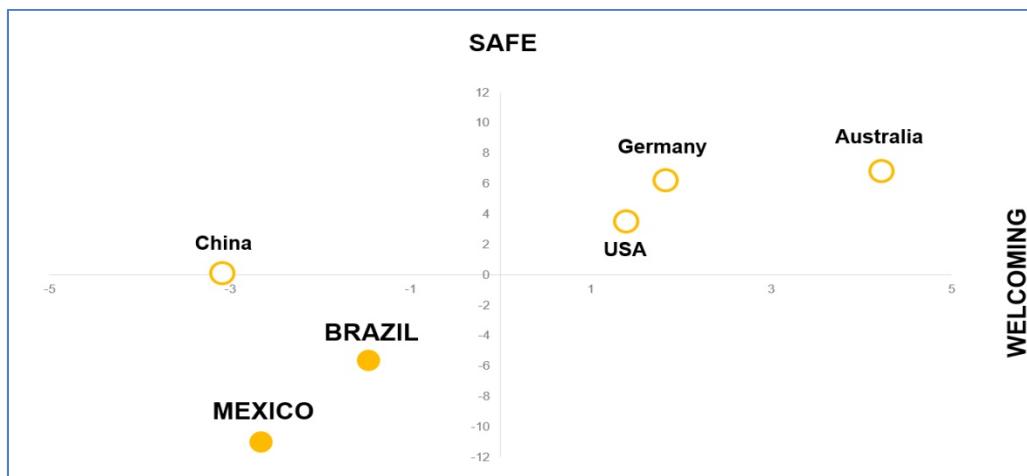
In the analysis above, we show that the share of the Latin American region in the global marketing research turnover falls behind the weight of the region for a number of leading B2B sectors. We also observe that the research turnover by country does not yet catch up with positive trends in GDP and in Foreign Direct Investment for a number of countries in the region. We believe that some of the reasons accounting for the gap between research intensity and the B2B sectors growth in the region lay in the general public's perception of conducting business and travelling to Latin America. A reflection of these concerns can be seen in the challenges identified by researchers commissioning work in the region.

Political turmoil and currency fluctuations affect the region's image in the eyes of ordinary people world over.

A study conducted by the Research Alliance in 2016¹⁾ suggests that there are many issues surround perceptions of the Latin America region by the outside world. Among the most outstanding issues are poor infrastructure, safety for citizens and visitors, and reputation for cheating and scamming. The region is not perceived as safe, friendly, and many respondents report a lack of trust in safety/quality of goods produced in the region.

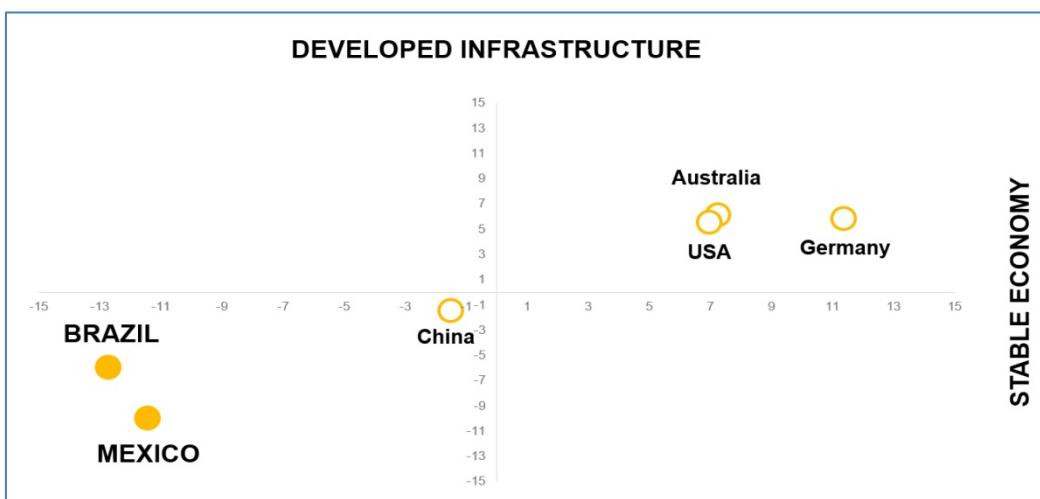
Figures 1 to 3 map out outside world's perception of Mexico and Brazil (two countries representing the region in the study) on the issues of tourist safety, economical and political image, and attitude to country's residents and guests.

FIGURE 1. ATTRACTIVENESS FOR TOURISTS

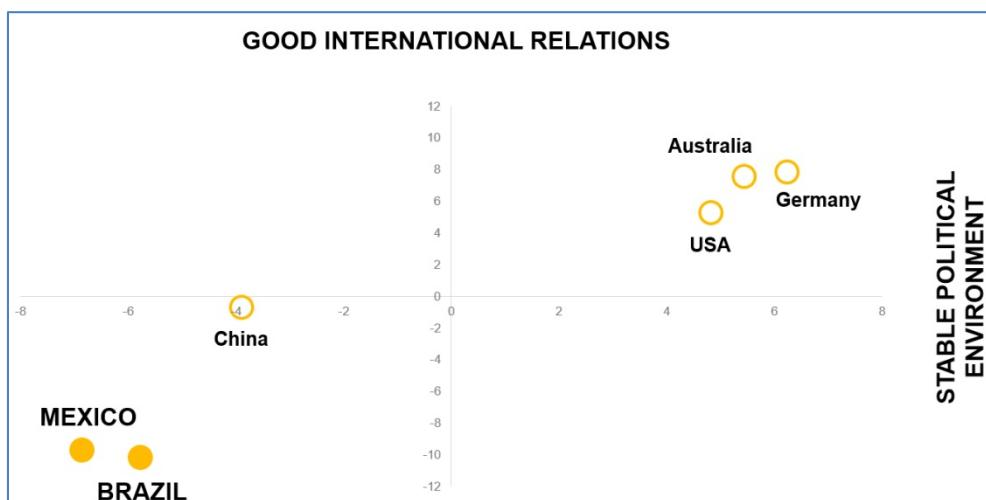


Source: The Research Alliance Global Trend Study 2016

FIGURE 2. COUNTRIES' ECONOMICS IMAGE



Source: The Research Alliance Global Trend Study 2016

FIGURE 3. POLITICAL OVERVIEW

Source: *The Research Alliance Global Trend Study 2016*

Economic factors are beyond researchers' control. Other reasons – such as perceptions of the region by the international professional services community – may be addressed and resolved.

While these perceptions may echo views of opinion leaders from other countries, we believe that some of those views are reflected in region's perception by the international research community. As many international researchers feel uncertain about the region, the current number of research projects commissioned to Latin America do not represent the region's true potential. To find out what specific issues are top of mind for researchers commissioning work in Latin America, we provide three recent case studies reflecting key challenges of working in the region in the appendix.

A summary below reflects idiosyncrasies commissioning agencies face when conducting projects in countries of Latin America. A more detailed illustration of the issues are provided in three case studies, described in the appendix.

To meet clients' objectives, commissioning agencies conducted face-to-face and online interviews with target groups specified by the client, those being decision-makers in Mining and Agricultural equipment and low income population exposed to a particular disease. All projects were industry-oriented with complex geographical and respondent type quotas and limited timeline, much shorter to what local suppliers were used to. Most of the challenges, experienced by commissioning agencies, were project-specific. However, all faced differences in communication and project management standards, time-consuming search for experienced moderators/interviewers and language barriers.

Even with anticipated and existing issues, tight cooperation, ongoing quality control, constant interaction with suppliers and prompt response of both parties to any rising problems resulted in successful completion of the projects.

IMPROVING COMMUNICATION, GROWING RESEARCH POTENTIAL

Combined experience with B2B projects in many countries of Latin America let us determine several issues that we have faced during the work. We suggest to review the challenges and proposed solutions, systematically reviewing typical stages of a B2B research project:

1. Challenges at the study design stage
2. Challenges at the study commissioning stage
3. Challenges at the study results processing and interpretation.

Table 3 is intended to summarize experienced and potential problems faced by B2B researchers commissioning work in Latin America. The challenges are listed from the perspective of the commissioning agency. Solutions come from both the commissioning team and from the local suppliers. The table sequentially goes through a typical study stages: design, set-up (including quoting, commissioning and briefing), and results processing and interpretation. The table operates two abbreviations: CA – Commissioning agencies, LS – Local suppliers.

TABLE 3. B2B CHALLENGES AND SOLUTIONS IN LATIN AMERICA

Design stage	Quoting	Commissioning	Briefing	Results
Challenges	Solutions			
Hard to identify potential suppliers, as many agency descriptions lack sector expertise information (B2B vs. B2C).	CA: Turning to market research associations for help (i.e. AMAI – Latin America MR association provided assistance by sending received RFQ to qualifying agencies, based on local knowledge).			
Hard to find an agency with sector-specific expertise (i.e. in agriculture).	CA: Two-stage approach in quoting: ask for sector expertise first, cover wide range of companies. As a second stage, send detailed requests to a limited number of local agencies.			
Hard to design workable quotas as many commissioning agencies lack local expertise.	CA: Use consultants when required to reach difficult targets such as academics or KOL. CA: Questions related to geographical coverage, need for long-distance travel, travel itineraries, remote site location need to be worked into the detailed request. LS: Local suppliers provide an estimate of travel expenses and travel timing and include it in the quote.			
Cultural differences lead to process changes acceptable to local suppliers, but not acceptable to commissioning agency (i.e. conducting interviews with senior professionals not in an office, but in a cafe).	CA: Providing detailed requirements/instructions about time, place and setting for face-to-face interviews. LS: Local suppliers clarify any changes to the agreed process prior to proceeding with interviews.			
Lack of feedback and pro-activeness from suppliers.	CA: Pushing and educating the agencies on the way we want them to work. Capitalizing on previous experiences to enforce strength and implementing new way of working with preferred partners.			
Language specifics – Spanish translation won't work in Chile or Mexico, Portuguese translation won't be acceptable in Brazil.	CA: Turning to professional translators/ agencies specializing in particular industry from Mexico, Chile, Brazil, etc. LS: Suppliers offer translation services or give detailed feedback regarding materials received in native language.			
Safety concerns for researchers – inability to make work with tablets because of robbery risks in the countryside.	LS: Inviting the farmers in a central place with an internet connection.			

Design stage	Quoting	Commissioning	Briefing	Results
Challenges	Solutions			
No direct feedback (confirmation of reception or refusal) on study feasibility prior to proposal acceptance.	CA: Formulating specific questions and asking for agency feedback directly in the initial research brief. CA: Following up with a verbal communication right after requesting a written quote (email → phone call → email). CA: Sending quotes to 5-7 companies to reach 2-3 as final suppliers.			

Design stage	Quoting	Commissioning	Briefing	Results
Challenges	Solutions			
Cost of the project may increase after the study was already commissioned..	CA: Discussing specific amounts dedicated to travel and incentive expenses after the initial agreement, but prior to full commissioning. CA: Working at the RFQ stage to ensure that the breakdown of cost will include all the ancillary costs. LS: Approving all additional travel costs before conducting an interview.			

	Design stage	Quoting	Commissioning	Briefing	Results
Challenges	Solutions				
Language barrier – often it is not possible to brief recruiters and moderators directly.	<p>CA: Budgeting for an interpreter for all the briefings, agreeing with the agency beforehand that briefing participation is required.</p> <p>CA: Arranging video conferences instead of audio calls.</p> <p>CA: Providing written text of the briefing, containing information regarding goals of the project, ways of addressing each question of the guide/questionnaire, explanation of specific industry terms. The information needs to be provided in the English and native languages.</p> <p>LS: Providing an interpreter familiar with the project on all teleconferences, briefings and calls.</p>				

	Design stage	Quoting	Commissioning	Briefing	Results
Challenges	Solutions				
Screener may not be followed.	<p>CA: Agreeing on providing respondent's profile to make sure he/she qualifies project requirements.</p> <p>LS: Consulting with commissioning agency to allow participants who did not answer all the screener criteria.</p>				
Intermittent communication with the supplier – several days may go without communication.	<p>CA: Using alternative ways to connect – such as What's App, Viber, Skype.</p> <p>CA: Performing constant communication – asking for feedback every day, phone conversations to confirm reception of e-mails/requests; adding attachments with detailed questions – excel grids with fields to input comments.</p> <p>LS: Local suppliers are open to informal communication – they pick up phones before and after their working hours to discuss urgent issues.</p>				
High level of employee turnover.	<p>CA: Try to work with large or well established company with a lower turnover in their employees.</p>				
Too much of extra micromanagement required (constant reminders and quality control of work start/ work flow; time-consuming updates gathering process; complex quality check).	<p>CA: Master service agreement with preferred partners, implying these partners already know our way of working and quality level expected.</p> <p>Special clauses on compensation for delay or errors.</p>				
Neglecting of deadlines because of late start of the fieldwork.	<p>CA: Insuring the fieldwork start when notified by asking an update right from the beginning.</p> <p>CA: When CATI interviews are possible favor a centralized approach to monitor easily the numbers of completed.</p>				
Business communication via personal e-mails in informal language.	<p>CA: Insisting on copying the agency into all written communication with respondents, adding signatures and contact details, using a specially created "Respondents written communication" template.</p>				
May not read all incoming e-mails or answer only some questions in a long e-mail.	<p>CA: Writing a general e-mail to let the supplier know a series of e-mail will follow OR writing one large e-mail with figured bullet points, each ending with a question.</p>				
Exaggerating number of completes/recruited respondents in updates, poor manager's involvement into fieldwork process.	<p>CA: Daily updates were required to get a real number of recruits/completes by the time of our update to the client.</p>				
Low progress denial.	<p>CA: Suggesting moving part/full sample to other countries of the region/ another supplier, softening quotas.</p>				
Work may be subcontracted without any notification.	<p>CA: Always requesting a list of people involved in the project, with an explanation that this is an important client requirement.</p> <p>LS: All subcontractors worked under the main local supplier name.</p>				
Delivery/fieldwork terms may be neglected.	<p>CA: Setting terms that would provide additional time of 2-3 weeks to get back to respondents with additional questions/clarifications.</p> <p>CA: Signing contract with mutually-agreed penalties for not providing data in time/providing data which does not meet the screener.</p> <p>LS: Agencies are very helpful in providing additional information requested even after the project has been officially completed.</p>				
Internal communication confusion because of days-off/sick leaves/ vacations.	<p>CA: Copying several managers in the correspondence, keeping in touch with the right person each time your primary contact is away.</p>				
Difficulties with post-payment regulations if sample size was changed.	<p>CA: Agreeing on a set cost per interview before starting the project.</p>				

LATIN AMERICAN SUPPLIER STRENGTHS

While some of the mentioned above difficulties require additional collaboration efforts, we have observed and experienced numerous advantages of conducting B2B research in the countries of Latin America. Based on the working relationships with agencies in Argentina, Brazil, Mexico, Chile, Peru, Venezuela and Colombia, we have seen the following aspects of interaction standing out as definite strong points.

1. Ongoing correspondence with a ***team of researchers***, in addition to the lead project manager: several analysts and field managers in a company are generally aware of the project details. In case you cannot reach your primary contact, you always get support from another contact.
2. ***Briefing participation***: typically, all the involved team members (project manager, assistants, interviewers) attend moderator briefings. Often, briefings are simultaneously translated from English into Spanish. Latin America teams are very engaged during briefings and usually provide detailed feedback after completion of pilot interviews.
3. ***Survey instrument feedback***: Latin America managers typically provide relevant feedback regarding project materials – screeners, questionnaires and materials shown to respondents. The feedback is actionable and makes the survey instrument locally relevant.
4. ***Constant availability***: managers are open to communication during and beyond working hours via office and mobile phone numbers, WhatsApp or Viber. Such attitude is very appreciated and helps move fast despite time difference between the countries.
5. ***Post-project follow-ups***: Latin American teams are very helpful in answering follow-up questions after the end of fieldworks and even after the official end of the project itself.
6. ***Project conditions flexibility***: Local suppliers have a flexible price policy and try to meet client's costs expectations. They are also flexible in accepting changes in the specs after the project start.
7. ***Wide coverage***: Latin American suppliers typically offer coverage from a network of local agencies of the region which enables them to reach a broader part of the continent.

FINAL THOUGHTS

Latin America is a region with high potential for the B2B research growth. It attracts foreign manufacturers from high-potential, dynamic sectors, including agriculture, construction, and healthcare. These sectors have historically invested in the region, and are determined to grow their presence, which, in turn, fuels stronger demand for research services. While some issues perceived by researchers and clients remain, the market is gaining attractiveness. Most of the obstacles can be minimized by information sharing and open collaboration between commissioning and supplying sides.

ENDNOTE

1. The Research Alliance (a global network of independent research agencies, many of which focus on B2B markets) conducted a Global Trends study in 2016. 4500 participants from 18 countries took part in the survey. They were opinion leaders, age 25-65 years in Australia, Brazil, PR of China, Denmark, France, Germany, Greece, India, Indonesia, Italy, Mexico, Poland, Russia, Spain, Sweden, Turkey and the USA.

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APPENDIX

CASE STUDY 1: FACE-TO-FACE INTERVIEWS WITH DECISION-MAKERS IN MINING

Client objectives

The client for the project was a leading construction equipment manufacturer, seeking to explore customer requirements for equipment delivery times across industry segments and regions. The project covered over 35 markets, including several countries in Latin America: Brazil, Colombia, Chile, Mexico and Peru. The target respondents were decision makers at a large construction companies and mine sites.

Researchers' initial concerns

Commissioning agency was concerned about completing the project on time considering a complex geography and industry quotas, which required air travel to remote destinations.

Experienced issues

Two main issues were: a) a delayed start of the project (10-day delay compared to other regions); and b) a high proportion of interviews not meeting the quality control standards (15% of the sample). These issues resulted from a difference in communication standards (i.e. expected 24-hour email response time from a commissioning agency) and from a misunderstanding of key assumptions (not spelled out in detail by the commissioning agency and not clarified by the local supplier), as well as from translation errors (back-translation was not discussed as a requirement).

Solutions

To replace the interviews which did not pass the quality control, and to ensure a high quality of the new ones, the commissioning agency arranged several follow-up briefings with interviewers, requesting live briefing translation in Spanish. Exact days and times for the updates and an extra layer of quality control procedures plan and increased quality control.

Project outcome

Timely acknowledgement of the problems and fast responses from both sides secured safe completion of the project. Research findings enabled the client to develop requirements for an improved distribution system in the region.

CASE STUDY 2: QUAL AND QUANT INTERVIEWS WITH DECISION MAKERS IN AGRICULTURAL MACHINERY

Client objectives

The client, main actor in the agricultural machinery equipment, wanted to understand the needs of their customers' (on specific tractor segment). The objective for the client was to address the best solution for each segment and consequently improve market share performance. Countries covered in Latin America were Argentina, Brazil and Mexico.

Researchers' initial concerns

Commissioning agency was concerned about: a) short timeline for local supplier as compared to their previous experience of work on similar projects; and b) difficult quotas on qualifying respondents, including geographical coverage and farm sizes distribution.

Experienced issues

Main obstacles were: a) the need to reduce prices to meet the client's expectations; b) lack of moderators' experience and knowledge of subject resulting in ineffective interviews; and c) the supplier's refusal to admit their inability to follow quotas.

Solutions

The local supplier agreed to replace ineffective interviews by new ones conducted by more experienced moderators and provided transcripts of each interviews to guarantee quality. An update form was created for the supplier to inform the commissioning agencies about recruitment and quotas meeting process and interviewing progress.

Project outcome

A stressful project and a lot of pressure put on our partners to finally make this project happen. Final insight provided allowed our client to identify the main buying criteria when purchasing a tractor as well as positioning themselves towards their competitors.

CASE STUDY 3: FACE-TO-FACE AND ONLINE INTERVIEWS WITH A REPRESENTATIVE SAMPLE FOR VACCINATION AWARENESS

Client objectives

The client, leading player in the vaccination business, wanted to assess awareness and interest in vaccination among population at high risk of a particular disease. The objective for the client was to design a new vaccination campaign to increase vaccination rate among the target population. Countries covered in Latin America were Argentina, Brazil, Chile, Colombia, Costa Rica, Mexico, and Peru.

Researchers' initial concerns

Commissioning agency was concerned about; a) recruiting a country representative sample of the target population including geographical coverage and low income population; b) meeting the client's deadline to publish a press release in local newspapers; c) adopting the questionnaire translation to the target population; and d) low internet penetration and thus the necessity to conduct in-person interviews.

Experienced issues

Main obstacles were: a) the need to reduce prices to meet the client's expectations; b) a large team of trained moderators in each of the countries to interview respondents in-person; c) Adverse Events reporting on a daily basis and according to the commissioning agency's standards; and d) absence of AER training materials in some of the local languages.

Solutions

Commissioning agency fieldwork managers are native speakers of the local languages of the region. Thus, they managed to find a local supplier in each of the countries based on interviewer network experience in medical research and capacity to match the expected geographic coverage. To prevent low quality of the interviews, a stringent coordination process was implemented for instant adjustments and problem solving.

Project outcome

Anticipating the issues, a strong partnership with each local supplier (from study design to challenging the outcomes) was organized. Daily interaction with suppliers (in their native language) to instantly solve existing problems resulted in a heavy but "smooth" and successful data collection process. Local press gave a very positive echo to the results, supporting the client in spreading the disease burden awareness among the population.