



4th Annual Future of Research™ Report

Research as Fusion Cuisine

2015


CAMBIAR
MASTERING CHANGE

Foreword

By: Russ Rubin, Associate, Research Impact Practice

You are in the marketing research and analytics business. But imagine, just for a moment, that you operate in a completely different industry. Imagine that you are in the restaurant business and that, all around you, the world is changing so rapidly that consumer tastes have become unreliable and fickle, new forms of cuisine are constantly being introduced and modes of dining are in flux. What then might be the results of a report of this nature?

Well, here is a foretaste (pun intended) of what the latest results of *Future of Research™* might say.

Consumer tastes in the near- to mid-term future mix good old home cooking and comfort foods with nouvelle cuisine. Despite the hype, old family favorites will continue to be enjoyed even though there is an abundance of new flavors to be enjoyed, since it takes time for diners to change old habits.

Do not expect major innovation in new cuisine from the big, established chain restaurants. It will be the smaller, innovative establishments that will innovate and introduce the dining public to new tastes. These are the restaurants that will get the best reviews.

Make no mistake, however: the new fusion cuisine will ultimately take over. The ability to pick a range of ingredients, mix together and provide the customer with a memorable and impactful experience (as part of the value proposition) will be essential skills and traits of the chef du cuisine of tomorrow.

But this does not mean that diners will be spending more on dining out. It just means that they will spend their out-of-home dining budget more on the new cuisine and, over time, less on the true favorites.

Welcome to this, the latest in a series of reports on the *Future of Research*. We will try not to be so allegorical in the remainder of this report, but we think you get the gist.

We'd love to hear from you! Please send your thoughts or comments to simon@consultcambiar.com

About the Future of Research Report and Cambiar

This is the fourth edition of the *Future of Research Report*, a series of studies which have been published annually since 2012.

The Future of Research Report examines forthcoming trends in marketing research and analytics both as a profession and an industry. It does so by talking, qualitatively and quantitatively, to leaders in both client companies and suppliers. The study seeks not only to understand where these leaders think research is headed, but where they want it to go and what they are doing to achieve that future.

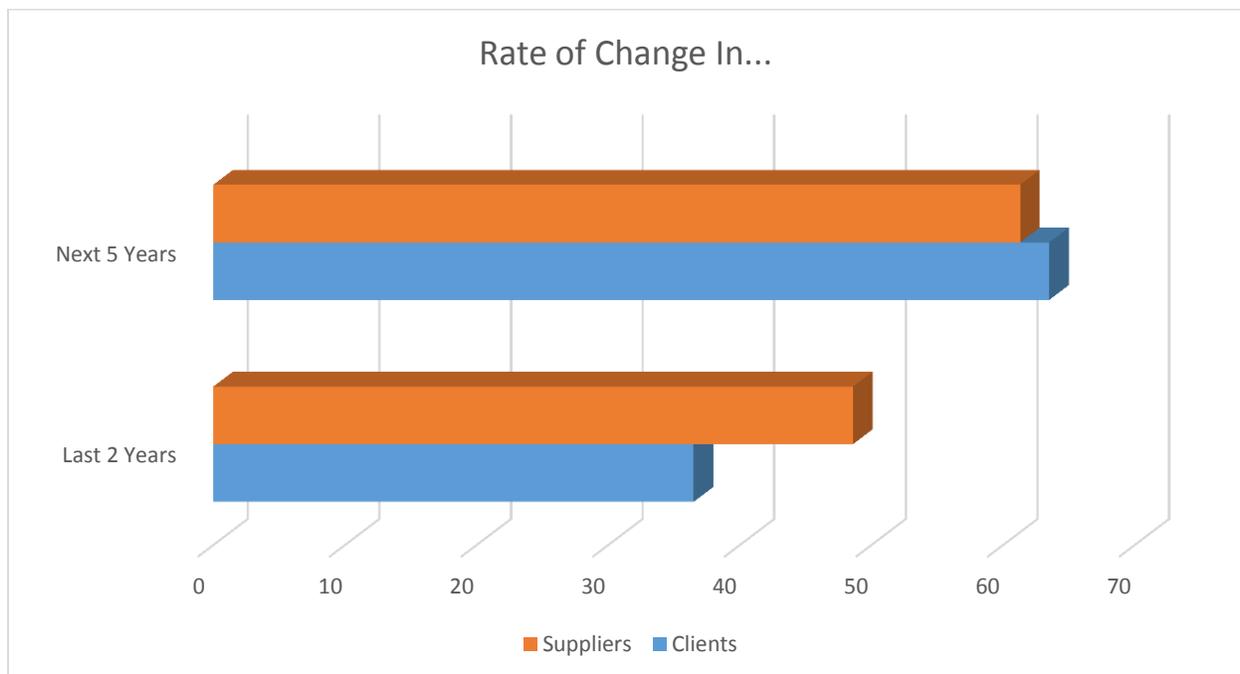
This year Cambiar engaged 285 leaders, of whom 104 were buyers and 181 suppliers. More details on the methodology and sample can be found in the Appendix.

About Cambiar: Cambiar advises and assists research agency executives and corporate insight leaders who seek to thrive in an evolving and challenging world. Our partners and associates have extensive experience in all aspects of business management leading large global entities to early start-ups. We're unified by one common goal—to make an impact in our industry and our clients' world.

Chapter 1: Change? Bring it on!

Whatever your position in the market research food chain, it is likely that you have already experienced significant change, and that you are expecting more adjustments in the next five years.

When asked to evaluate the pace of change in the last two years (on a 5-point scale where 1 was "minor" and 5 was "massive"), fully 49% of suppliers and 37% of clients opted for the top two boxes. This would suggest that suppliers downstream of changes in client organizations are experiencing that change fairly viscerally in their own organizations and business models. But it does not end there: when asked to evaluate the likely rate of change over the next five years, clients and suppliers alike expected a significant increase in the pace.



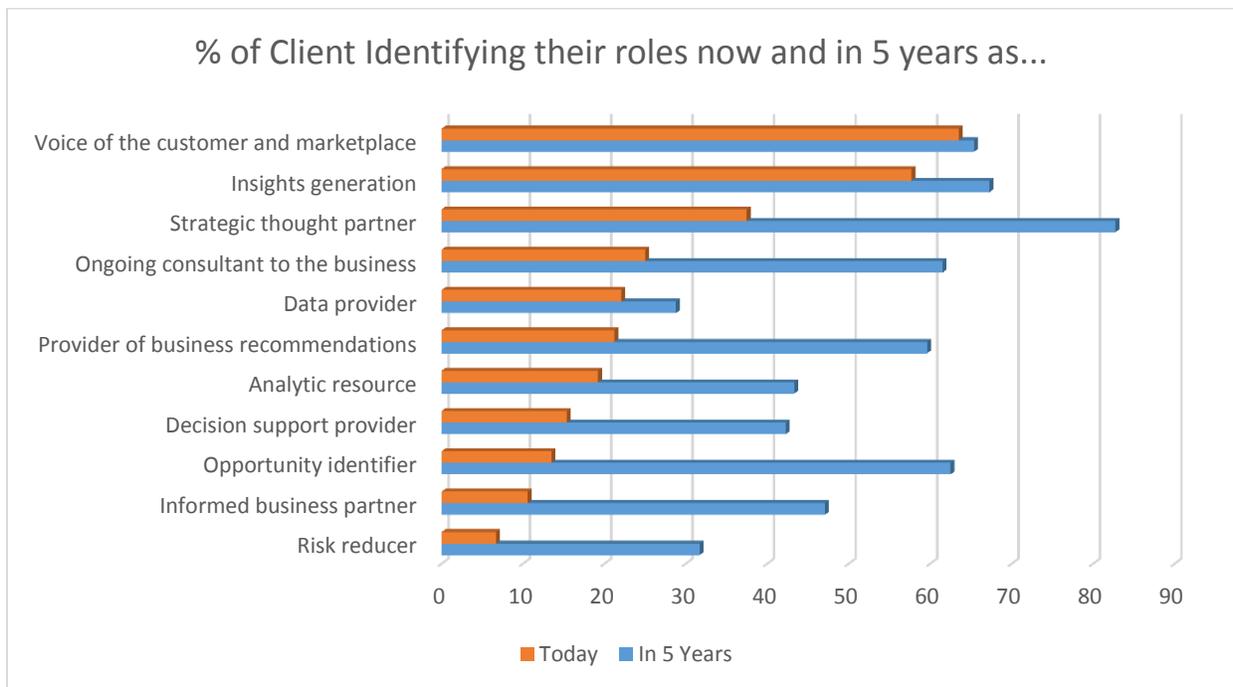
The good news, in the midst of all this change, is that fully two-thirds of clients feel they are having *a greater impact* on the decision-making of their business partners than they did two years ago. Only half of suppliers felt the same thing, a figure which is open to numerous interpretations that will need to be the subject of more and later study. Interestingly, these figures are even higher when the researchers involved are integrating numerous sources of data and/or using social media analysis as a complement to more traditional methods.

And who are the key partners upon whom corporate researchers are having greater impact?

- Brands and marketing (80%)
- Senior management (C-Suite) (64%)
- Customer marketing (51%)
- Corporate strategy (43%)
- Sales (35%)

It is probable that we would not have seen such strong identification of the C-Suite and Corporate strategy folks as key business partners for research even five years ago.

It is also clear that clients are excited about their future role. When asked to identify the expected differences in their roles five years from now, participants stressed aspects of the job that were of a higher order, including strategic thought partnership, being consultants and opportunity identifiers and providers of business recommendations.



This chart also highlights a number of other findings going on in the client side of our profession:

- Today's roles remain relatively limited compared to the aspirations we saw in the *1st Annual Future of Research Report*. Primarily the role of corporate market research and insights functions are still seen as being **voice of the customer** and **insights generation** (with little thought as to how those insights are then taken on through the rest of the business).
- The proportion of the clients saying that they play the role of **strategic thought partner** is identical today to what it was in our first annual report (37%). Given that the aspiration to become a strategic thought partner was as strong then as it is now, it is clear that progress in the client world is uneven at best.
- While clients are aspiring to higher order roles, it is also clear that they expect to be taking on more roles in the future—even ones which had largely been confined to the back room, such as "risk reducer." Will they have the capacity to fulfill all these roles? Will there be the corporate vision to let this be so? Disturbingly, only 44% of clients rate the role of market research in their own organization as being "clear" or "very clear."

So what is holding us back? What are the barriers to success in market researchers' quests to have more impact and play a greater role? When broken down, it seems to be a story either of reduced budgets or of research not being able to be in the right place (structurally or tactically) at the right time to influence a decision.



Interestingly, clients tend to emphasize the tendency for senior management to make decisions on gut instinct, a factor that Corporate Executive Board brought to the forefront two years ago when they found that only 5% of customer-centric decisions actually involved research. Suppliers tended to emphasize market research departments not having enough influence among senior management. This would suggest that they have less confidence in their clients than perhaps they ought!

Perhaps most intriguing of all is that large clients (those with corporate revenues in excess of \$10 billion) are much more likely to emphasize the influence of large consulting firms as usurping the research or insights department as thought leaders within the organization. Are the years of researchers shouting, "The consultants are coming!" really now starting to become true?

Key Takeaways

When the *1st Annual Future of Research Report* was released, clients and suppliers forewarned of major change to come. That change has arrived and its pace is only expected to quicken in the next five years.

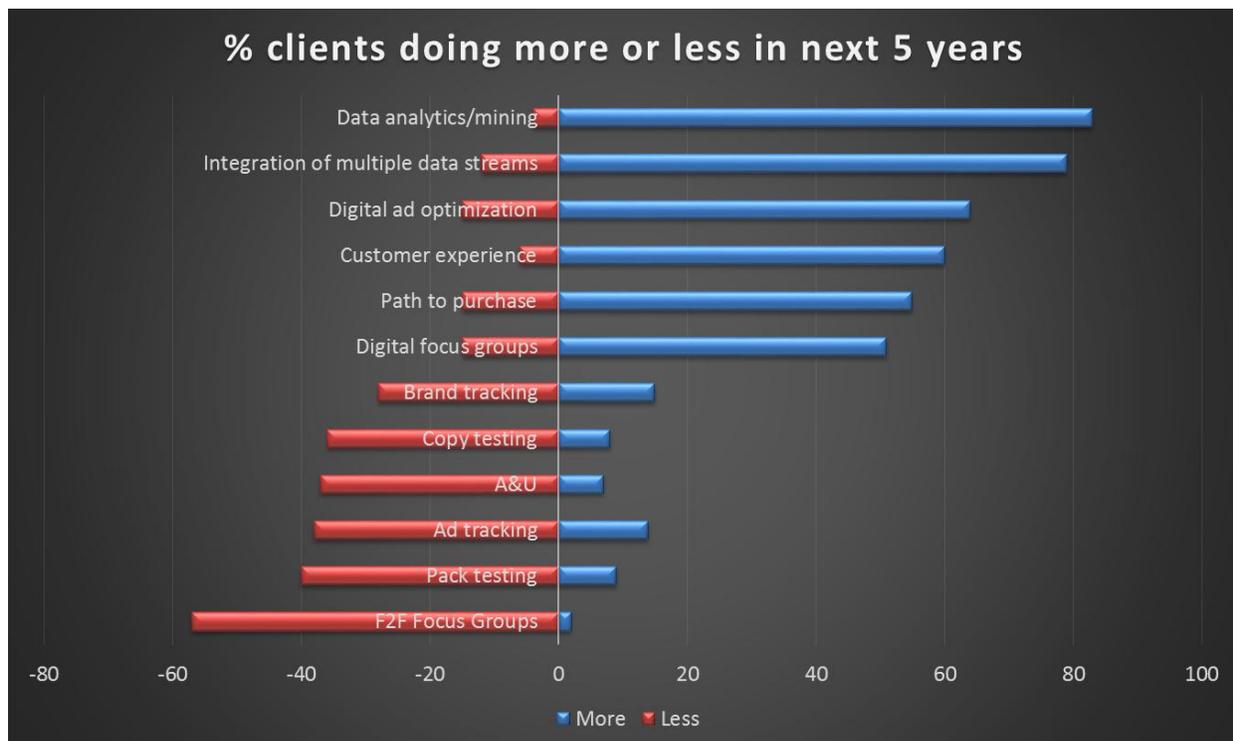
Among clients there is a genuine feeling of having made progress in terms of the impact that they are having on their internal business partners, whom they identify as being much higher up in the organization than in the past.

There is both anticipation and aspiration in the roles that clients believe they will be playing in the future, but this is not quite matched by the progress we have seen in their roles in the last five years. Will aspirations be fulfilled or does disappointment lie ahead?

Some of the barriers that may lead to disappointment lie in reduced budget and headcount, as well as market research just not being in the room when decisions are made. In larger client companies, the consultants may be there ahead of them.

Chapter 2: Shifting Sands

As a result of the Great Recession of 2009 and fundamental changes in attitude towards the function of consumer insights in major organizations, research is now expected to deliver more in the way of impact, while at the same time using fewer resources.¹ Consequently, heads of insights departments have had to reconsider, sometimes in ways that are radical, how to get results, what methods to use and what to stop using. When asked what they were going to spend more on in the next five years (and what they were going to cut expenditure on), clients paint a picture of rapidly shifting sands.



It is clear that “old favorites” such as brand and advertising tracking, copy testing, attitude and usage studies, pack testing and face-to-face focus groups are headed into the history books.² In their stead, we see a marked shift to the digital (both qualitative and quantitative) and to analytics and the integration of multiple data sources.

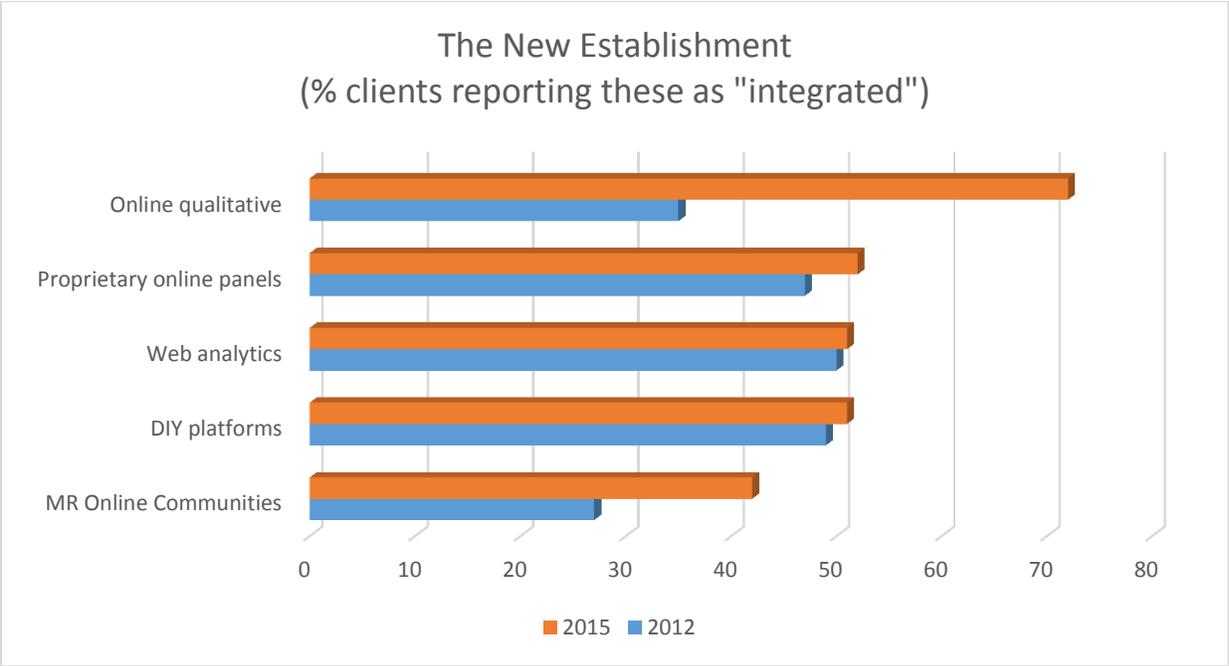
There is further evidence that adoption of data analytics does further “harm” to traditional primary research techniques than is evident in the chart above: those who are already engaged in analytics spend less on quantitative surveys, concept testing, product testing and on ad testing. They do, however, spend more on market mix modeling.

¹ For more about these shifts in attitude, see the 1st and 3rd Annual Future of Research™ Reports.

² Streamed focus groups, on the other hand, will see a slight uptick in usage.

In reassessing the portfolio of methods and means clients employ to derive insights that have impact, over the past five years clients have been heavily enabled by the advance of technology which in turn has made this a decade of unprecedented innovation and creativity. New ways of engaging consumers in research, understanding their behavior and decoding their motivations now abound. How has the adoption of these new technologies and methodologies progressed in the first half of the decade? Cambiar has been tracking this in its *Future of Research Report* since its inception and it is clear that there are indeed winners and losers in the race.

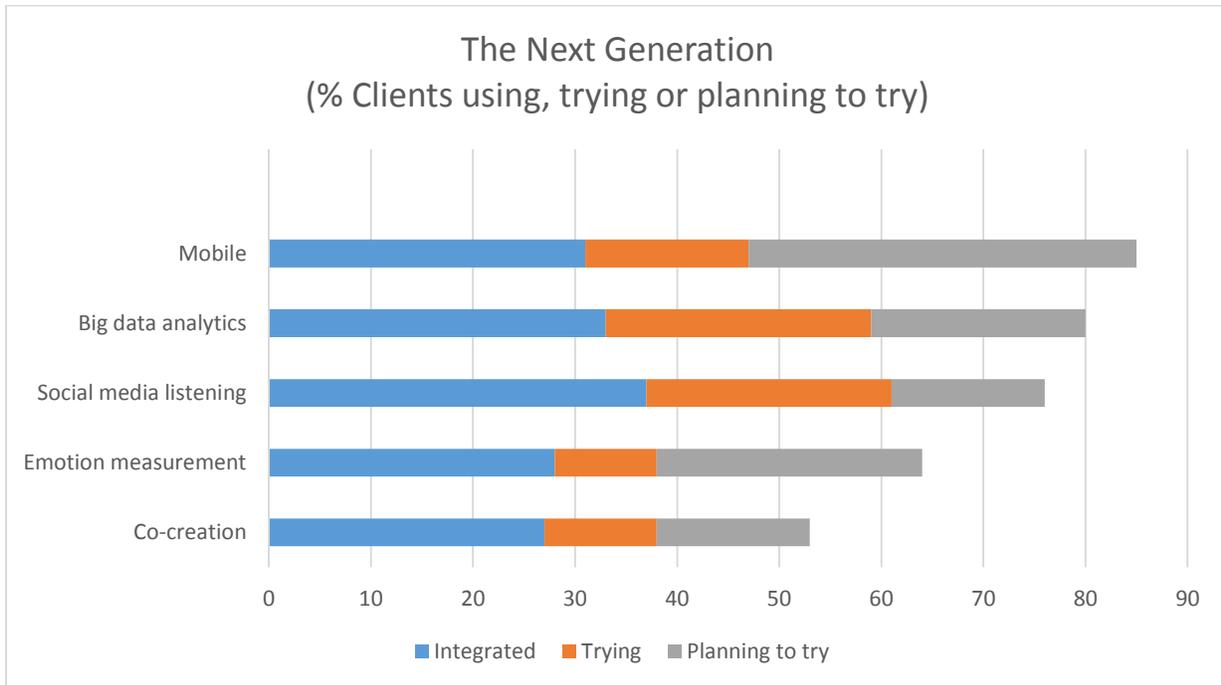
The next three figures chart those methods and technologies that (a) are heavily embedded in clients’ armories and are reaching maturity; (b) are next in line for mass adoption; and (c) that seem destined to remain niche applications.



The biggest winners over the past three years have been both online and digital qualitative (including ethnographies) and Market Research Online Communities (MROCs). These, as well as proprietary panels, web analytics and the use of DIY platforms, are now all firmly established as part of the normal toolkit.

The next generation of methodologies and technologies to achieve this status is shown in the chart on the next page. After years of experts saying “this is the year of mobile” we are finally in the year of mobile. It is clear that clients have accepted that mobile is here to stay and while still less than half have either integrated it or are trying it, the vast majority of late adopters appear to be jumping in. Similarly with big data analytics and social media listening, we see very few client companies opting to stay on the sidelines. However, given the tendency of those who do adopt these to cut back on

traditional market research methodologies, as well as the necessity to curtail long surveys on mobile, we may expect that these trends will continue to suppress the industry's traditional topline growth.



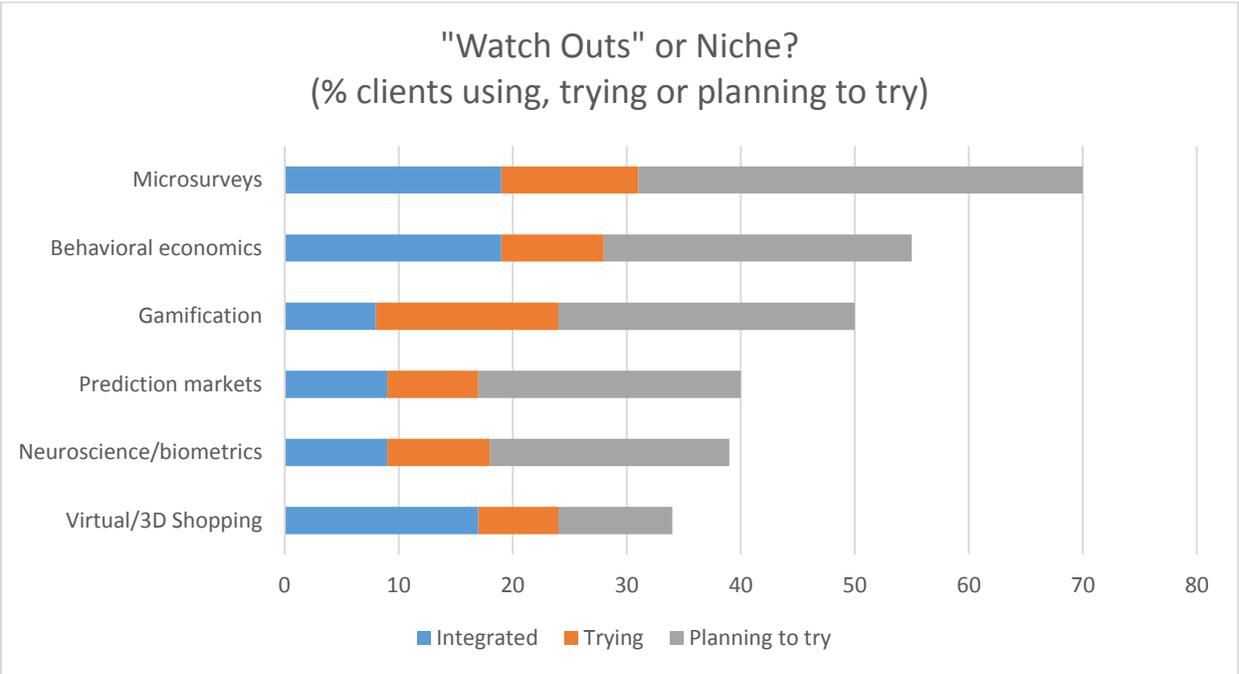
Despite the fascination with all things “analytics,” there continues to be ample evidence, as we suggested in the *3rd Annual Future of Research Report*, that there remains equal interest in getting much closer to understanding human emotion and the “why” behind behavior, as well as in involving the consumer much more interactively in innovation. Co-creation in particular has seen a 50% increase in the number of companies integrating this into their portfolios since 2012.³ Expect to see these two areas become more and more a source of conversation over the next two years.

One other methodology that readers may have expected to see in the Next Generation chart above is Eye Tracking. Indeed, a third of clients have integrated this into their toolkits, but few are following them in terms of experimentation or planning. In fact, fully one half of participants responded that they either had no plans to try it or had abandoned it. This would lead us to speculate that eye tracking is more relevant to some industries than others and will therefore remain a niche.

³ 2nd Annual Future of Research Report

This leads us to new innovations and tools that have yet to take off or perhaps are destined to remain more niche than mainstream. The figure (Watch outs” or niche?) suggests that the next big thing to emerge out of this pack into the mainstream over the next five years will be microsurveys. While there was a lot of excitement when Google Consumer Surveys entered the market, the predicted “rush” to microsurveys did not materialize, at least not to the extent that it fundamentally changed the survey landscape. But it is evident there is interest in this approach (perhaps moving hand-in-hand with that in mobile) and that we are likely to see more activity in this area in the future.

Similarly in behavioral economics, a subject that has engaged European researchers more than their counterparts in the US, there is movement towards experimentation, as indeed there does where gamification is concerned. Both of these areas show mild increases in adoption and/or experimentation over the last three years.



Other approaches are destined to remain (for now, at least) as niche tools. Prediction markets, for example, may be well-suited to particular types of research and/or industry, but are not viewed as mainstream by the majority of clients. Virtual/3D Shopping may also fall into this same category, but it has in fact seen a considerable increase in adoption since 2012, from 4% then to 17% today.⁴

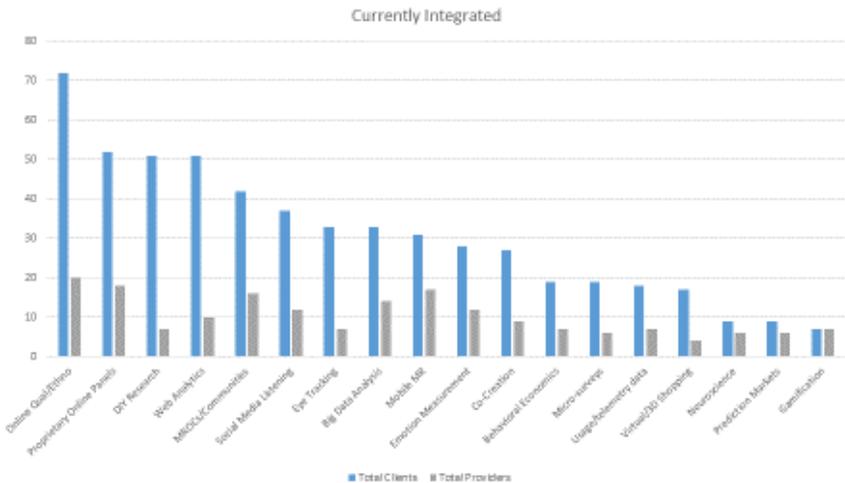
⁴ 2nd Annual Future of Research Report

Which leaves neuroscience and biometric feedback. Although there is interest in some quarters, and despite the vast sums of money spent in experimentation by specialist suppliers, this remains an area which stubbornly refuses to budge in clients' minds or spending. Indeed, there is less inclination among our client sample today to experiment in this area than there was three years ago and no change at all in the number of clients that have adopted it into their toolboxes.

Where virtually all new tools and methodologies are concerned, it is the larger client that is more likely to have adopted them and the larger supplier that supplies them.

What is still staggering is the degree to which established market research agencies remain so far behind their clients in terms of offering them what they need where new methods are concerned, or indeed in even considering that one day they are going to need to offer them. We have pointed this out in each of our *Future of Research Reports* and the situation has, if anything, deteriorated in that time. Where some of the more integrated tools and methods are concerned (for example, online qualitative), the gap can be as much as 50 points between clients saying they have integrated the tool and agencies saying that they offer it. It would appear that the established research community has decided that it will not compete in these new-fangled areas, thus opening the door to new competition. The end result, as shown in our *Cambiar Capital Funding Index™*, is that there are now more than 400 new competitors in the market research and analytics industry. While the majority will likely not survive, it is likely at least forty of these will grow to become significant competitors to those who left the barn doors open for them.

Current Usage of Newer Tools



Key Takeaways

The face of research and insights is indeed changing, with some of the more traditional means giving way not only to data analytics but also to subject matter that is now felt to be of more relevance. Thus brand tracking and physical focus groups give way to customer experience and path to purchase. Many “new” techniques are now establishment - online qualitative, proprietary panels and MROCs, for example. Mobile and big data analytics represent the next generation that will join the establishment.

Sadly, research suppliers are still a long way behind their clients in realizing this and in offering solutions that meet their needs. And so the door to new competition remains as open as ever before.

Chapter 3: The Role of Analytics

As we've reported over the last four years, in both *Future of Research* and *Cambiar Capital Funding Index*, the buzz in the industry and among investors has been around the word "analytics." At first it was social media analytics and then it was big data.

There is no doubt that the integration of both of these into the insights eco-system in many companies does make a large difference in the way they behave. They are less likely to spend budget on many traditional primary research methods (especially tracking and testing of concepts, products, packaging and copy); are more likely to integrate multiple sources of data; and are more likely to experiment with new ways of procuring, curating and disseminating insight.

But how well is the role of analytics understood? How well is it defined? And what exactly do analytics do for a company that research cannot do?

We started off by analyzing the use of social media analytics. Fully three-quarters of clients say that their organization today engages in the analysis of social media—rising to 89% of clients with revenues over \$10 billion. Research agencies again tend to lag behind in terms of offering such capabilities to their clients—54% of all agencies and 76% of those with revenues over \$10 million. So we can say that it is pervasive and heavily embedded into clients' overall insights portfolios—it has become establishment. This is confirmed by our analysis of capital inflows into social media analytics firms which have stabilized over the past two years and are now concentrated in those firms that have actually "made it" and have grown into sizeable organizations.

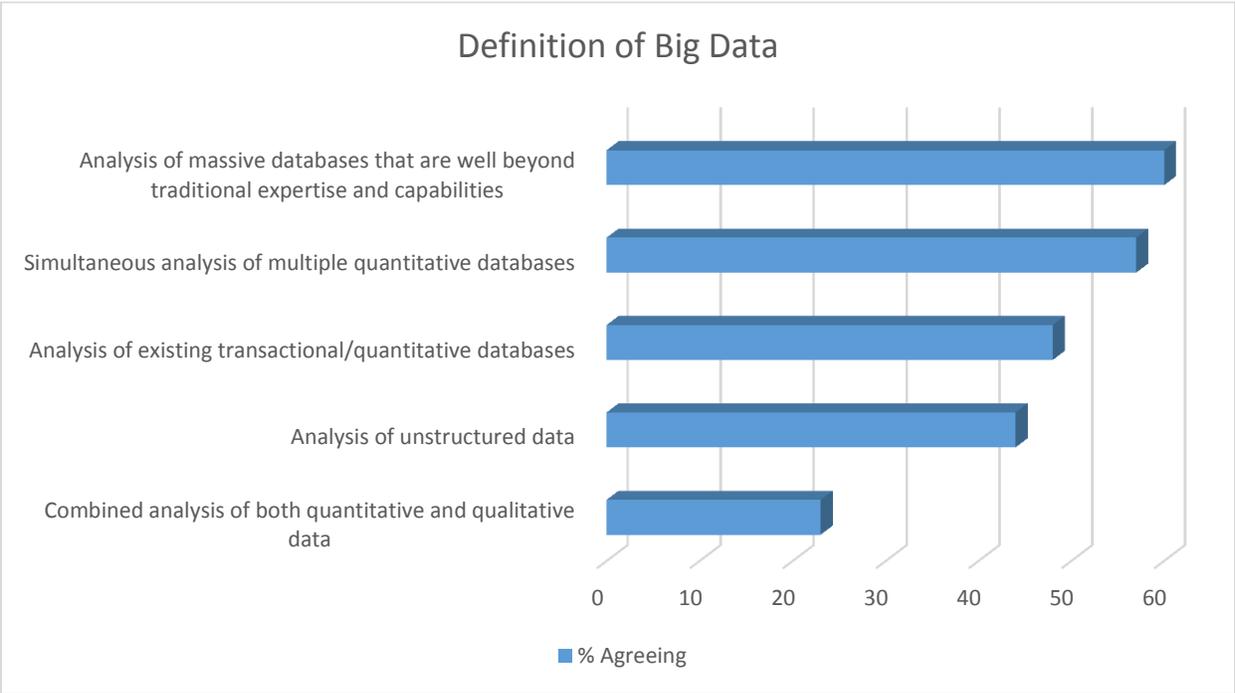
We asked our participants that either use or offer social media analytics to rate the importance of this tool (on a 5-point scale where 1 = Not at all Important and 5 = Essential) to a variety of insights tasks and objectives.

Objective	Top Box %	Top 2 Box
Early warning systems	33	73
Understanding issues in the market place	30	69
Voice of the customer	29	66
Supplementing traditional research tools and techniques	25	66
Understanding consumers/customers in real time	23	66
Ideas for innovation	17	51
Competitive analysis	13	45
Speeding up the decision-making process	13	37
Co-creation and innovation	11	34
Replacing slow and expensive surveys	7	21
Replacing traditional qualitative tools	3	20

Note that replacement of traditional research tools is not on the priority list of most of those questioned. Supplementing them, yes; replacing them, no. Rather, the emphasis seems to be on real-time warning systems as well as ways in which to interact with the customer and the market on a timely basis. Asked whether this would be likely to change in the near future, participants thought not, suggesting that while there clearly is some collateral damage to what we view as traditional research (from what we saw from behavioral responses), this is not a tool that is going to be the much vaunted killer of the survey.

What, then, of big data? In the 3rd *Annual Future of Research Report*, we discovered there was considerable confusion as to how exactly to define big data, let alone how to use it or where responsibility would lie in the organization for its analysis and synthesis. Among research agencies, we found deep divisions between those who felt that market research absolutely had to embrace big data and bring it “inside the tent” versus those who believed it had nothing to do with research and should be treated as a separate industry.

We found the industry had moved on somewhat in the intervening year in terms of definition, but was still conflicted as to where responsibility for this new tool would lie.



As can be seen, there is something of an element of “all of the above” to responses in this figure, suggesting that participants feel that big data still represents a “broad church” in terms of its potential use. Nonetheless, it should be noted that 59% of all client research and insight participants are already using big data in some form or another on non-MR data (69% of large client organizations) and 47% of research

agencies are offering capabilities, even if only experimental at this stage. It would appear it is already seen as a de facto tool of the future.

Less certain is who, on the client side of the equation, will have responsibility for and authority over big data analytics in the next five years. One quarter of client participants predicted that they would have responsibility for it, but another 30% felt that there would be a separate 'business analytics' group that would oversee it. The remainder named a multitude of different possibilities, including both IT and Finance.

Clearly, there is a lot more of this story to unfold in the next few years.

Key Takeaways

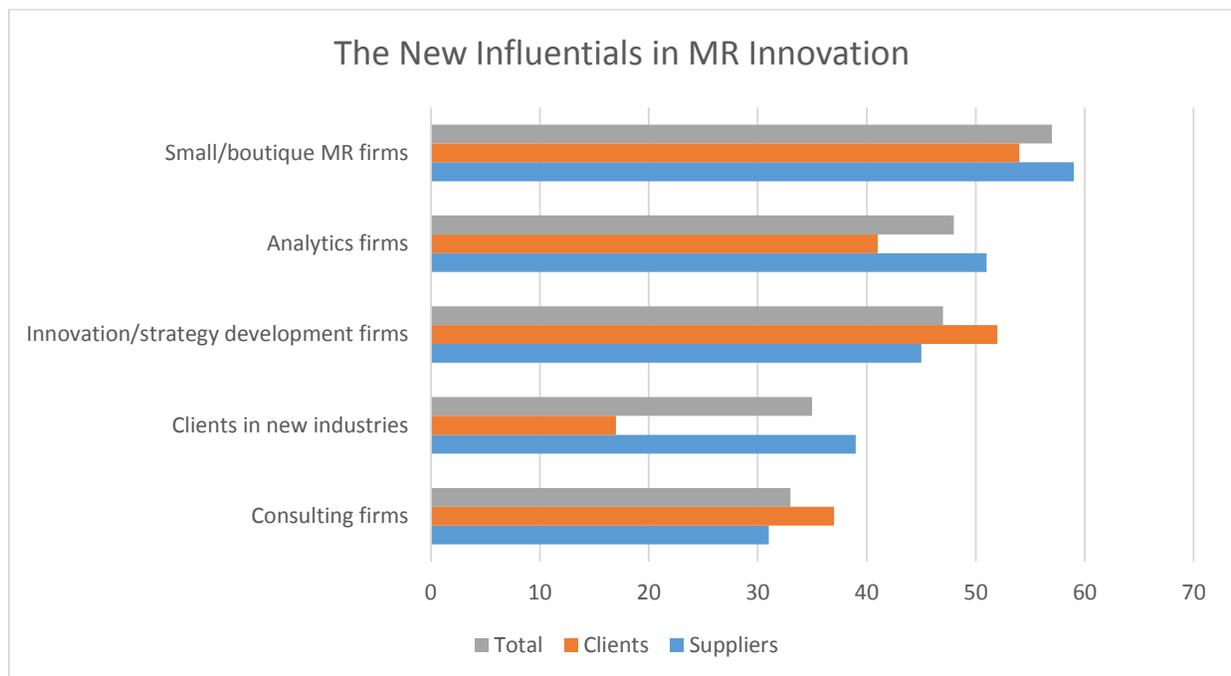
There is no doubt that the use of data analytics is now becoming an established part of insights generation and that it is displacing traditional research to some degree. Not all data analytics are seen as being replacements for research, however. Social media analytics, for example, is seen much more as supplementing rather than supplanting it.

The role of big data analytics and its effect on traditional research has yet to be written.

Chapter 4: Leadership in Innovation

One of the most popular elements of the GRIT Report (published by GreenBook) is the table ranking the most innovative research suppliers in the industry. This led us to wonder, if these are the most admired innovation companies, are they also the ones to which the rest of us turn for innovation leadership, or are there other sources that are equally as influential? For example, we have seen that the larger research agencies are those that are more likely to offer innovative solutions to their clients. Do they occupy a position of innovation leadership or are they, as their detractors would claim, merely acquirers of innovation? Or are the clients themselves the innovation leaders?

The results are highly instructive and suggest that, for the most part, researchers are turning outside of the mainstream for inspiration and leadership in innovation.



At a conference ten years ago, a client from IBM once famously stated “innovation comes from the margins in MR.” At the time, she meant that much innovation came from small, boutique or new companies in the MR space. It would appear that her contemporaries today would continue to agree with that assessment. But the “margins” also appear to be spreading—to analytics firms, companies specializing in innovation and strategy development and to management consultants. Research agencies would also add to this list, clients in industries that have not traditionally done research—perhaps feeling that they are less constrained by legacy systems as they approach the task of understanding their markets and customers. Agencies also told us that they learn from non-MR companies that supply services to their clients—again, searching outside of the industry boundaries for ideas and inspiration.

This is not to say that the “usual suspects” do not possess some influence as well. Conferences, the trade media, trade associations and large global agencies are all cited by between 25% and 35% as providing leadership in innovation, just not to the extent, perhaps, that these newer outside influencers do.

Perhaps most disturbing is that academia, a place where one would hope to find innovation leadership flourishing, comes in very low on the rankings, cited by only 15%. There they are accompanied by advertising agencies, sample suppliers and bloggers!

Chapter 5: It's All About People

Given the rate of change in this industry - in technology, methodologies, data sources and client demands - what will be the types of skill set needed in the near-term future? Five years from now, what types of people and what talents will we value?

Client research leaders and senior suppliers are both of one voice on this:

<u>TODAY</u>			<u>Five Years From Now</u>	
Report and Pres. Writing	77%		Intellectual curiosity	78%
Project Management	70		Story Telling	76
Intellectual Curiosity	67		Consulting Skills	75
PPT and PC Skills	58		Insight Development	73
Multi-Tasking	55		Synthesis	65
Statistics and Analytics	55		Creativity	65
Insight Development	53		Influence Skills	60

Whereas today the skills that are prized are mostly centered on the process of research, those of tomorrow will emphasize the ability to synthesize and create the story and then effectively carry that story, with impact, to management. Whereas today we focus on project management and reporting skills, tomorrow we will need story-telling, consulting and influencing skills. Today we see ourselves as craftspeople, tomorrow we shall be creatives.

But, if this is the case, are we actually following this up in our hiring and training patterns? Well, yes and no. The "no," in this case, is surprisingly found to be among clients, while research suppliers, especially the larger ones, appear to be hiring at a much more eclectic level.

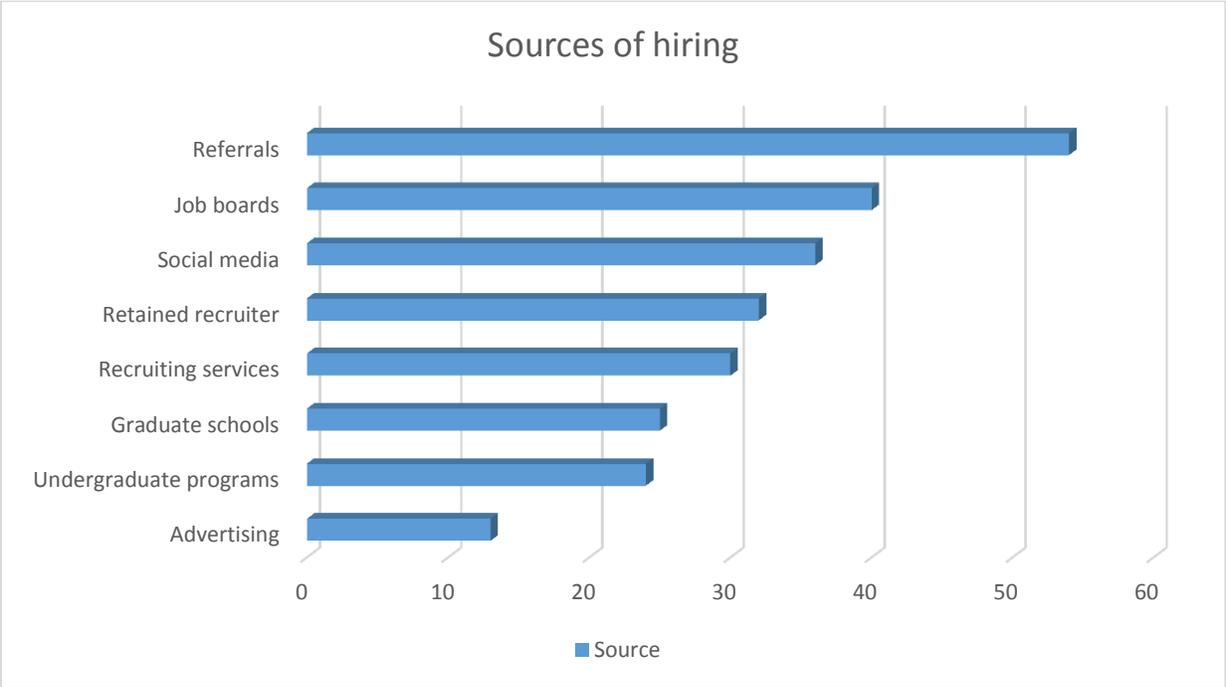
Just over three-quarters of our participants made one or more hires in the past twelve months and 81% were currently hiring at the time of the survey. In half of the organizations in which hires were made, the successful candidates were labeled as "generalists." This could be good or bad, depending on what a "generalist" is. Are they capable of synthesis, consulting and story-telling or are they just generalist

researchers? In another third of organizations hiring, the hire was of a specialist in advanced analytics.

And that, for clients, was pretty much where it stopped, aside from the 13% who hired a web analytics specialist.

Suppliers, on the other hand, filled a much broader variety of roles, including graphic designers (25%), management consultants (15%), social media researchers (14%) and many other types of specialist. This was especially true of larger suppliers, 98% of whom were hiring and were doing so across the board of specialties. Does this suggest that clients are going to rely more on their suppliers to provide the specialist skills that will be needed in the future—and they themselves will concentrate on hiring generalists (All-rounders? Polymaths?) and data analysts to deal not only with their internal big data needs but also their upward consulting needs?

Whatever the interpretation here, it is clear that the way in which researchers, both clients and suppliers, go about hiring is not a very structured process. The top three sources for new hires rely more on serendipity than targeted searches for the right type of talent.



Suppliers are more likely to rely on referrals, social media and undergraduate programs than their client peers. Overall, the pattern is similar. Larger agencies, however, cast a much wider net than any others, perhaps because they are just that much more active in hiring at present.

Once these organizations are successful in hiring people, how much formal training can their employees expect, if any at all?

The answer to this is frightening: **In 46% of client organizations, the answer is none at all.** In a “small” client company (<\$10 billion in annual revenues), fully 60% of research professionals receive no formal training.

A further 26% of companies provide minimal formal training. In part, this is offset by the training that their suppliers offer to their employees—29% of suppliers offer more than a good deal of formal training, especially in the larger agencies (37%). Yet, even here, a significant proportion of agencies (44%) offer little to none at all.

In an industry where new skill sets are going to be demanded in addition to those already possessed, the lack of foresight represented by this dearth of training can only be described as breath-taking.

This is not to say that in these organizations there exists no training at all. Rather, what there is, is more likely to be informal, taking the form of mentoring, on the job supervision or conference attendance.



Once again, the chances of an employee receiving any of the types of training shown above are considerably more likely in a larger research supplier than in any other type of organization.

Key Takeaways

Talent management appears to be an area of management in which insights managers, whether corporate or supplier, are not doing a great job—especially if you think about this from a strategic point of view. While accepting that the talents and skill sets of the near future will be very different from those of today, the pattern of hiring does not suggest that we are bringing these new talents into our organizations. And, once we have hired new staff, we are not doing a great job of training them to be successful in the era ahead.

What does this all mean?

As we have said for the last four years, change is here and it is speeding up. But the sky is not falling. It's quite the opposite. Researchers appear to be gaining impact in their organizations.

The way they are doing it, however, is very different as more tools are brought to bear, some of which do indeed impinge on what we would regard as "traditional" research. Suppliers are still not completely on board with this change, leaving the door open for many new competitors that are beginning to redefine the industry.

Change in what we do means change in the skill sets that we will need. This is recognized by most but has yet to percolate through to hiring or training.

Research and consumer insights are truly at an inflection point, one that offers real opportunities. Not all will realize those opportunities, but those that do will prosper.

APPENDIX

Methodology and Demographics

Methodology

An online survey was administered between July 2014 and September 2014, with complete responses being received from a total of 285 senior researchers – 181 in research suppliers and 104 in client organizations.

The sample was drawn from Cambiar’s own database of senior industry leaders and managers, as well as from the membership of the Corporate Executive Board’s Market Insights Leadership Council and invitations posted on LinkedIn.

Demographics

Research Suppliers: Total 181

Size of Company (\$)	%
Under \$1 million	18.2
\$1 – 4.9 million	18.2
\$5 – 9.9 million	15.5
\$10 – 24.9 million	12.2
\$25 – 49.9 million	9.4
\$50 – 99.9 million	5.5
\$100 – 999 million	9.4
\$1 billion plus	7.2
Don’t know/NA	4.4
Mean (\$m)	211.5
Median (\$m)	8.7

Years in Research	%
Less than 5	2.3
6 to 10	6.1
11 to 20	21.0
21 to 30	33.7
Over 30	37.0
Mean (yrs.)	25.4
Median (yrs.)	27.1

Research Focus	%
Entirely quantitative	24.3
Qual and Quant	70.7
Entirely qualitative	1.7
Other	3.3

Job Title	%
CEO/President/Owner	53.6
EVP/SVP	18.2
Vice President	7.7
Snr. Director/Director	6.1
Chief Research Officer	3.3
Chief Operating Officer	2.8
Other	8.3

Clients: Total 104

Company Size (\$ revenue)	%
Under \$500 million	9.6
\$500 – 999 million	1.0
\$1 billion – 4.9 billion	21.2
\$5 – 9.9 billion	8.7
\$10 – 19.9 billion	23.1
\$20 billion +	28.8
Don't know/no answer	7.7
Mean (\$ billion)	14.55
Median (\$ billion)	12.50

Job Title	%
Senior Director/Director	36.5
Senior Manager/ Manager	30.8
EVP/SVP/VP	16.4
Other	16.3

Industry	%
Consumer Packaged Goods	25.0
Retail	12.5
Insurance	11.5
Business Services	8.7
Manufacturing	5.8
Financial Services	5.8
Media	4.8
Pharmaceutical	3.8
Technology	3.8
Healthcare (non-pharma)	3.8
Automotive	2.9
Energy	2.9
Travel & Entertainment	1.9
Telecommunications	1.9
Other	4.8