QUIRK'S

Marketing Research Review

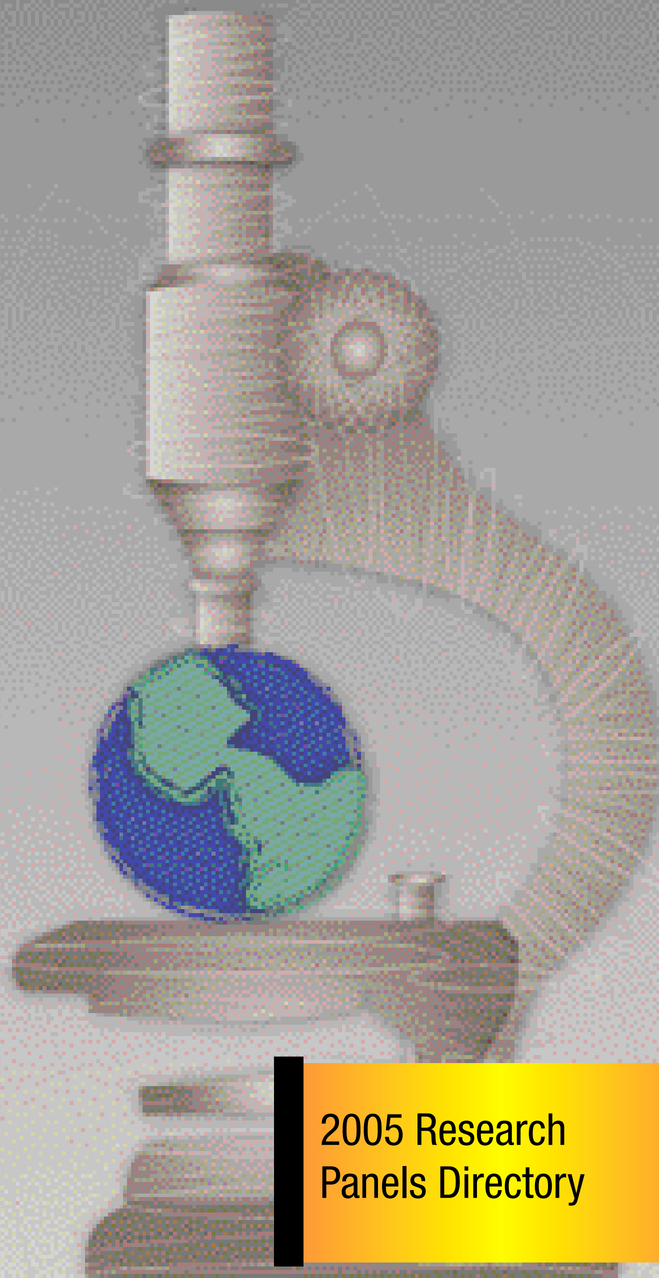
NOVEMBER 2005

International Research issue

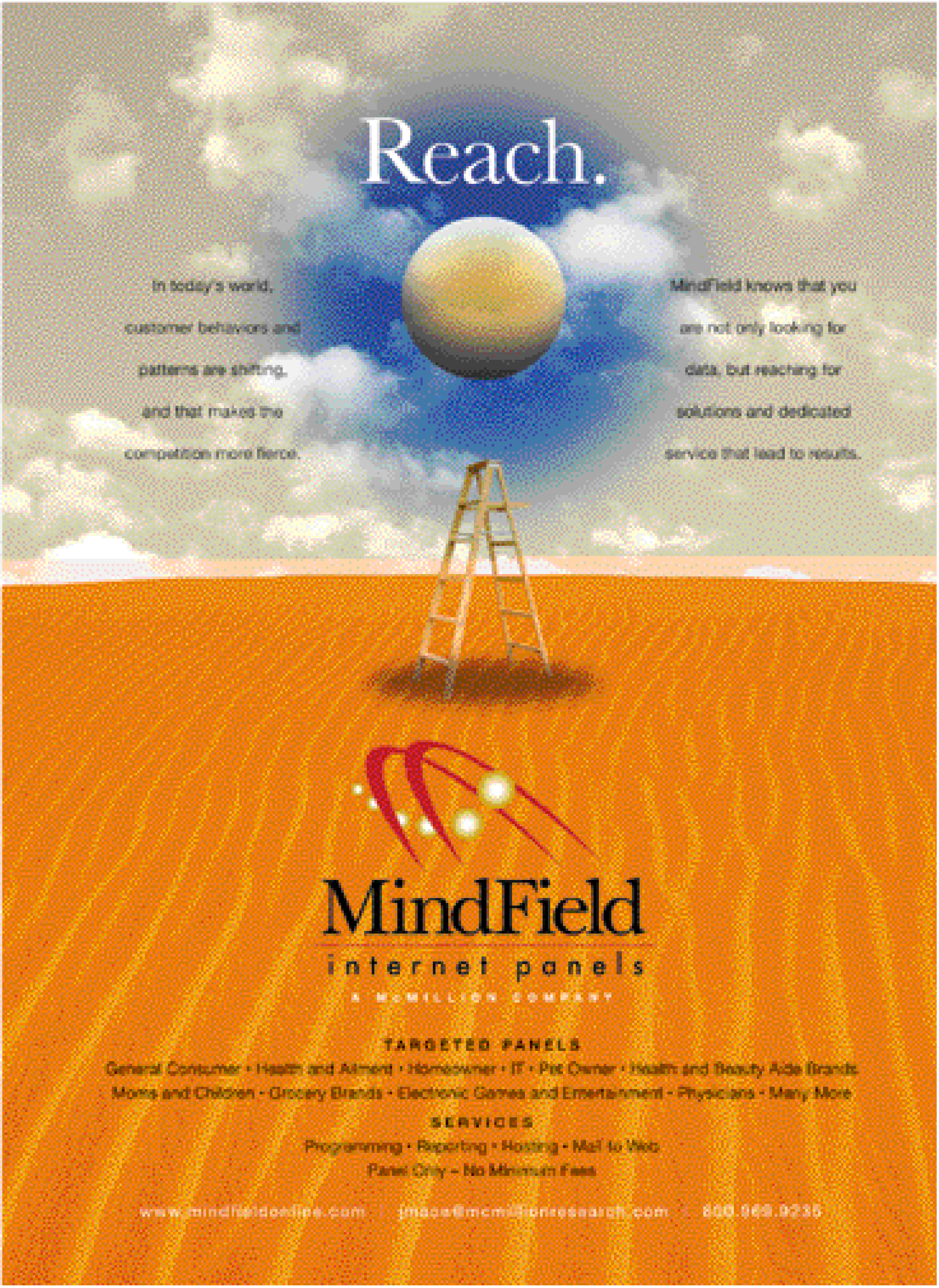
> In-situ research in Latin America

> How to buy translation services

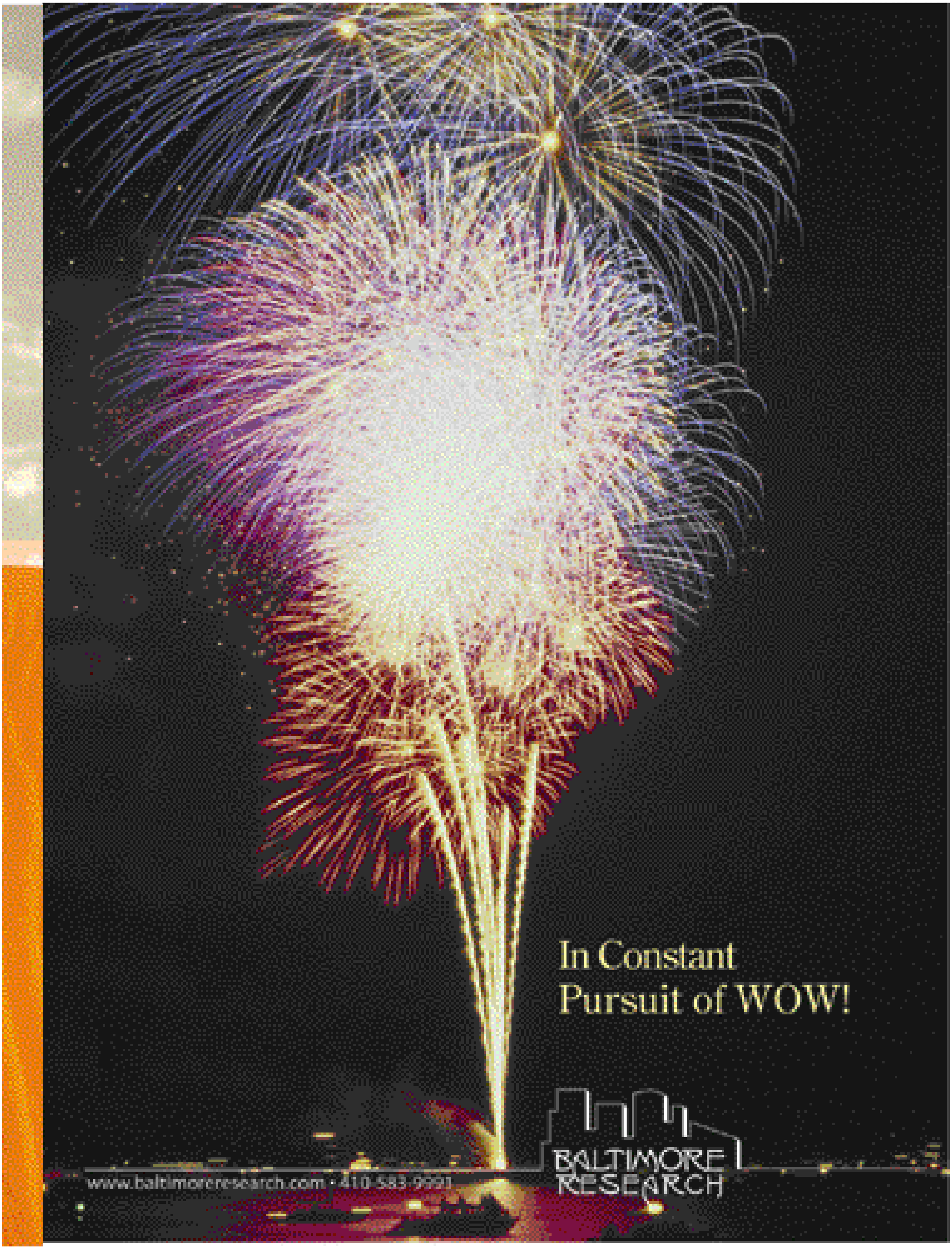
> Research says aye to VisitScotland ad campaign



2005 Research Panels Directory



Reach.
In today's world, customer behaviors and patterns are shifting, and that makes the competition more fierce.
MindField knows that you are not only looking for data, but reaching for solutions and dedicated service that lead to results.
MindField
internet panels
A McMILLION COMPANY
TARGETED PANELS
General Consumer • Health and Ailment • Homeowner • IT • Pet Owner • Health and Beauty Aide Brands
Moms and Children • Grocery Brands • Electronic Games and Entertainment • Physicians • Many More
SERVICES
Programming • Reporting • Hosting • Mail to Web
Panel Only – No Minimum Fees
www.mindfieldonline.com


In Constant
Pursuit of WOW!
www.baltimoreresearch.com • 410-583-9991
BALTIMORE
RESEARCH

Quirk's Marketing Research Review
Volume XIX Number 10

contents

case history

24 A storied destination
Scotland's tourism agency revamps ad campaign to attract European visitors
By Anna Lilleengen

techniques

30 An enriching process
In-situ research in Latin America
By Martha C. Rivera

38 Success in any language
Tips for buying translation services
By Beth Podrovitz and Jiri Stejskal

44 For best results, plan ahead
Managing international research
By Jacob Brown

48 Q&A: Research in Mexico

52 You may get more than you pay for
Want better product ideas? Try smart incentives
By Rajan Sambandam

56 Managing for maximum return
How to nurture your online panel
By Beth Rounds and Heidi Dickert

60 Making steady progress
Online panels improving, evolving
By Gerry Philpott

64 Your survey, our needs
Panel respondents tell what gets them to participate
By Janet Westergaard

68 Is MRO a friend or foe?
Like it or not, outsourcing of research services is here to stay
By Akbar S. Ahmed

columns

16 By the Numbers
European research panels growing, adapting
By Andrew Cooper

20 Qualitatively Speaking
Ten tips for using interpreters in international research
By Anne Orban

114 Trade Talk
ESOMAR panel research conference shines
By Joseph Rydholm

departments

6 In case you missed it...
8 Survey Monitor
10 Names of Note
12 Product and Service Update
14 Research Industry News
85 2005 Research Panels Directory
112 Index of Advertisers
113 Classified Ads

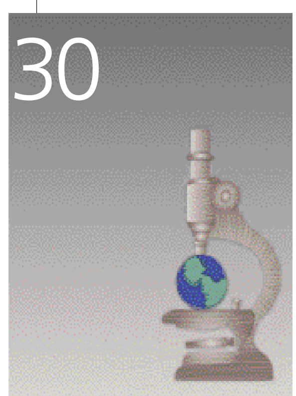


Illustration by Jennifer Coppersmith

Publisher Emeritus
Tom Quirk

Associate Publisher
Evan Tweed

Editor
Joseph Rydholm

Production Manager
James Quirk

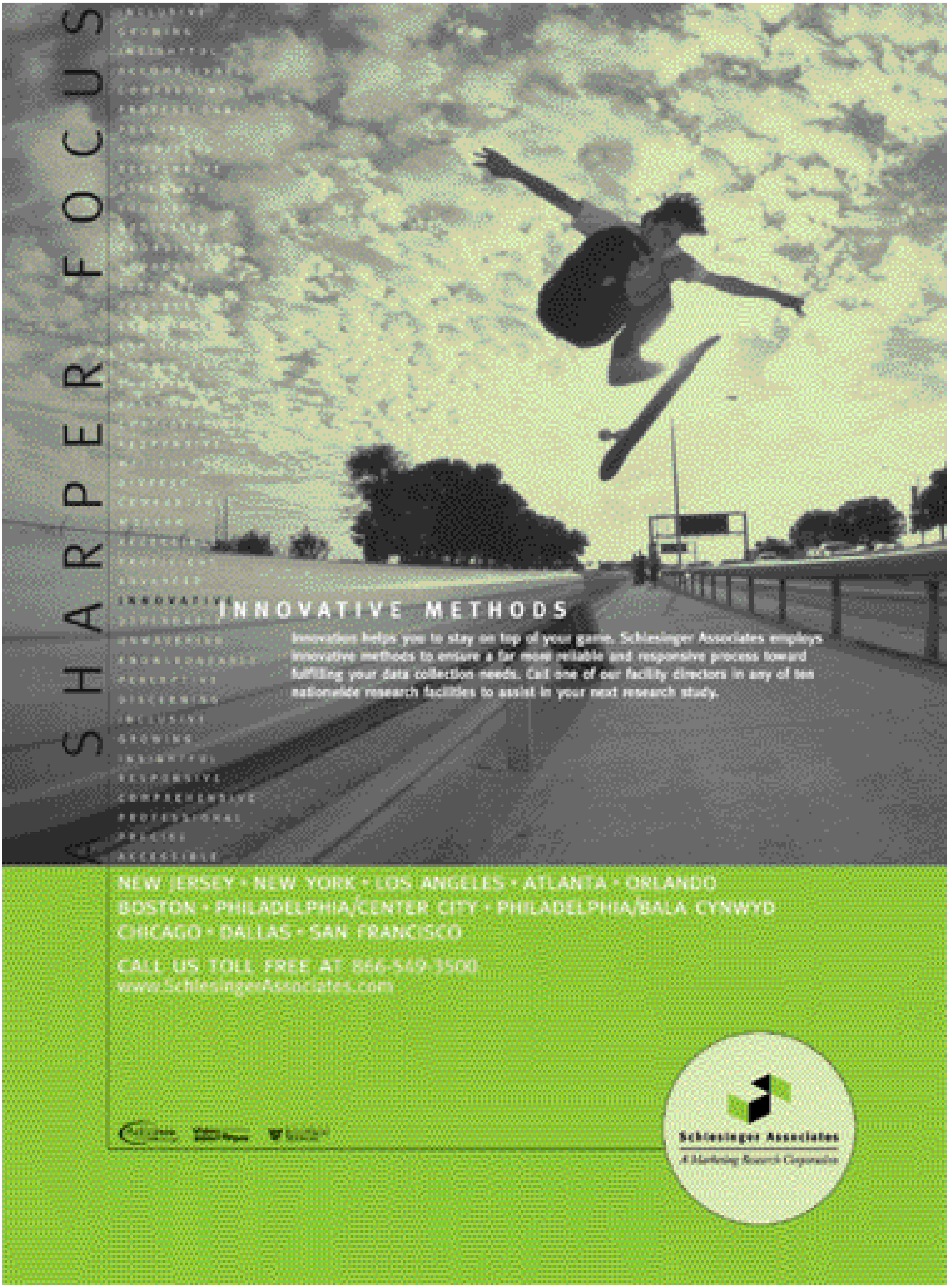
Directory Manager
Steve Quirk

Directory Assistant
Shawn Hardie

Marketing Manager
Dan Quirk

Advertising Sales
Evan Tweed
952-224-1919

Lane E. Weiss
415-461-1404


SHARPER FOCUS
INNOVATIVE
PERCEPTIVE
DISCERNING
INCLUSIVE
GROWING
INSIGHTFUL
RESPONSIVE
COMPREHENSIVE
PROFESSIONAL
PRECISE
ACCESSIBLE
INNOVATIVE METHODS
Innovation helps you to stay on top of your game. Schlesinger Associates employs innovative methods to ensure a far more reliable and responsive process toward fulfilling your data collection needs. Call one of our facility directors in any of ten nationwide research facilities to assist in your next research study.
NEW JERSEY • NEW YORK • LOS ANGELES • ATLANTA • ORLANDO
BOSTON • PHILADELPHIA/CENTER CITY • PHILADELPHIA/BALA CYNWYD
CHICAGO • DALLAS • SAN FRANCISCO
CALL US TOLL FREE AT 866-549-3500
www.SchlesingerAssociates.com
Schlesinger Associates
A Marketing Research Corporation

In case you missed it...

news and notes on marketing and research

Wal-Mart does some Target shooting

It seems wrong to place the words Wal-Mart and upscale in the same sentence but if the Bentonville behemoth has its way, it won't seem wrong for long. In the September debut of its fab new Saturday edition, *The Wall Street Journal* had a page-one article on Wal-Mart's attempts to class up its stores, with the unstated but likely aim of attracting rival Target's customers.

As the *Journal* article pointed out, sales at stores open at least a year - a key measure of retail performance - rose twice as fast at Target over the past year as at Wal-Mart. And Wal-Mart's share price is down 17 percent in the past year while Target's is up 18 percent.

One indication that change was afoot came in a June quote from Wal-Mart's Chief Executive Lee Scott, who was reacting to the disappointing sales figures following the company's efforts to appeal to cash-strapped holiday shoppers last year: "You just can't spend all your time chasing a customer who is going through that economic cycle."

That may be, but consumers already hit by months of record gas prices are now facing a winter of soaring heating oil and natural gas bills, so "that economic cycle" shows no sign of ending soon. Does Wal-Mart really want to price itself out of its core market's range?

Make no mistake: Wal-Mart is still Wal-Mart. "Always low prices" remains the mantra. Not every store will undergo a changeover and most will likely stay very much the same. But in response to its research, which uncovered a customer that Wal-Mart isn't reaching, the retailer is trying to introduce more flair and fashion into its clothing sections. The overlooked customer, which Wal-Mart calls Gracie, is 25 or older and spends a large share of her disposable income on clothes. To capture her interest, Wal-Mart has opened a trend-spotting office in New York, staged fashion shows, and taken out ads in *Vogue* touting its new sense of style.

To its credit, Wal-Mart does seem to realize that attracting Gracie and her ilk to the store is only half the battle. You need to make her shopping experience fun and enjoyable, which is hard to do when display and merchandising acumen seem non-existent. (The *Journal* article quotes Wal-Mart's executive Claire Watts: "We did focus groups with thousands of women and their biggest dislike was the mess on the floor" of the apparel sections.) To spiff things up, the company has dispatched a 340-person team to enforce better merchandising habits.

In the end, that may be all the retailing giant needs: a good dose of cleaning and organizing. Shopping at Wal-Mart has never been known as an enjoyable experience - the stores are often too dirty and noisy for that. The foundation for Target's success is its understanding that many shoppers want the best of both worlds: low prices and a fun, clean place to shop. Don't Wal-Mart's customers deserve the same?

("Looking Upscale, Wal-Mart Begins a Big Makeover," *Wall Street Journal*, September 17-18, 2005)

I just saved a bundle on my ad budget

MediaPost Publications' *Online Media Daily* reported in September that GEICO, the company known for its humorous commercials about people saving money on car insurance, launched what may be the first marketer-generated effort to create a large-scale consumer-generated media campaign promoting a brand.

Working with agency CDG Solutions, GEICO unveiled a Web site inviting amateur filmmakers to create 15-second spots based on its TV ad campaign featuring the GEICO gecko. GEICO didn't call entries in the competition ads. Instead, it referred to the spots as "15-second conceptual movie trailers," which ran on the dedicated campaign site, goldengecko.com. Visitors to the site have to watch a brief commercial (for GEICO or one of the site partners, which include Hilton and Renaissance hotels) prior to viewing their chosen spot.

The initiative was aimed at the 18-to-34-year-old crowd, and was as much an interactive, viral campaign as it was about creating new commercials. It also comes at a time when consumers have begun creating their own versions of commercials for major brands and posting them directly on the Internet. Adcandy.com, an online community based around users who create their own ads, slogans and jingles, announced a site-based competition to create ads to compete for Coca-Cola Co.'s worldwide advertising account.

Prior to posting on the goldengecko.com site the spots were vetted by a technical and a legal team to make sure each was formatted correctly and did not contain copyrighted content.

Jack Johnson, a GEICO business analyst, said the online initiative marked a new twist for the firm, which traditionally relied on TV and radio buys. "We've never done anything like this before, but we were looking for new possibilities to reach a young demographic," he said.

The "Golden Gecko" competition, which ran through October, offered participants the chance to win prizes in five different categories - drama, comedy, animation, action, and "other." Prizes included LCD TVs and trips to Waikiki. Winning video spots will be announced on November 15.

And what exactly does filmmaking have to do with selling car insurance? "About as much as GEICO's TV commercials have to do with selling car insurance," CDG CEO Scott Adams joked.

Johnson agreed. "We're big on the soft sell," he said. "We're not about just telling people to buy something."

("GEICO Hosts Amateur Film Contest," *Online Media Daily*, September 20, 2005)

A model marketing plan

As reported in the June Springwise e-newsletter (www.springwise.com), Dutch temp agency Models at Work has 150 aspiring/beginning models on file for hire to spice up corporate events, parties and dinners. Some of them will actually work, serving drinks at the bar or checking coats, though others are just eye candy, mingling with guests, or injecting the dance floor with a dose of it-ism.

Scoff if you must, but the collapse of traditional advertising and the subsequent shift towards real-time, in-the-flesh promotional events and branding experiences has created a need for model-like bodies to fill galleries, tents, ballrooms, bars and lounges, in virtually every city around the world. Just ask corporate clients like Martini, Bacardi, Moët & Chandon, Coca-Cola, Puma, G-star, Cartier, MTV, Elle, Esquire, and T-Mobile, who have used the agency to spice up their corporate and marketing events.

Springwise has this bit of advice for the not-so-beautiful people: Start your own Models At Work and taste sweet revenge by making the pretty people work for you.


Serving up the world on one platform.
GMI serves 15 of the top 25 global market research firms.
GMI Net-MR™ Software
One integrated, real-time platform makes every phase of market research more productive.
Reliable – You can count on our integrated, real-time architecture, supported 24/7.
Versatile – It's easy to create engaging experiences for web, phone, or face-to-face interviews.
Cost-effective – Net-MR offers scalable performance and low total cost of ownership.
GMI Global Panels
High panel integrity lets you conduct research with confidence.
Engaged – Our rigorous double opt-in process, excellent incentives, and 24/7 service, result in industry-leading response rates and low attrition.
Thoughtful – Controlling respondent fatigue and removing poor performers results in thoughtful responses and generous verbatims.
Authentic – Our security and privacy practices build trust and allow extensive profiling.
GMI Service Bureau
Open 24 hours a day, seven days a week worldwide.
Integrated Services - We offer a single-vendor solution to manage all phases of project execution.
Versatile – Whether you need scripting, data processing, or outsourcing for entire projects, we can handle it.
High Capacity – Nearly 100 skilled professionals are ready to support you anytime, anywhere.
Talk to one of GMI's Solutions Experts or get a fast quote on your next project by e-mailing expressRFP@gmi-mr.com
Integrated solutions for market intelligence
GMI
www.gmi-mr.com
info@gmi-mr.com
1-866-5-Ask-GMI
(1-866-527-5464)
+1-206-315-9300 (Seattle, Global Headquarters)
+61-2-9066-1695 (Sydney, Asia Pacific Office)
+44 (0) 207-887-6028 (London, European Office)
Seattle Atlanta Boston Budapest Chicago Cincinnati London Los Angeles Madrid Minneapolis New York Paris Pittsburgh Sao Paulo Shanghai Singapore Sofia Stockholm Sydney Toronto Tokyo Vancouver

For movies, Europeans go, Americans stay home

When it comes to watching movies, Internet households in North America prefer to stay at home while similar European households prefer the cinema, according to Global Digital Living, a multinational consumer study by Dallas research firm Parks Associates that provides comparative data from 13 nations, identifying the relative rates of adoption of

digital living technologies.

For North America, the gap between renting versus going out is particularly pronounced in Canada, where 54 percent of all Internet households rent movies each month but just 29 percent go out to the movies at the same rate. Conversely, European Internet households prefer the cinema over renting movies. In France, for example, 36 percent of all Internet households go to the cinema every month while just 21 percent rent movies.

"The practice of 'cocooning,' or surrounding your personal living space with everything you want, appears to be stronger in North America than in Europe," says John Barrett, director of research at Parks Associates. "North American households are much more likely to use pay-per-view or have a subscription TV service, and the difference in film viewing habits is an extension of this trend."

In addition, the study found that Asian Internet households generally follow their North American peers and rent movies more often than go to the cinema. South Korea was a notable exception, however, with 43 percent going to the movies monthly and 35 percent renting movies monthly.

"This finding in Korea is partially due to the increasing use of the Internet to watch movies," Barrett says. "Forty-eight percent of Korean Internet households download or stream video every month, a number that surpasses both their rental and movie-going rates. Korea has always had a weak movie rental market, which ironically has helped boost the demand for online distribution."

The Global Digital Living project is a study of worldwide consumer technology trends. It surveyed Internet households in 13 nations: France, Italy, Spain, Germany, Canada, Taiwan, Japan, India, China, South Korea, Australia, the United Kingdom, and the United States. For more information visit www.parksassociates.com.

Women around the world share their views on money

A Synovate study conducted in nine international markets shows that more than half of American women earn more than their partners, secret slush funds are alive and well in Japan and Saudi Arabia, and nearly nine out of 10 mainland Chinese women claim to have at least an equal say in the purchase of big-ticket items such as property and cars.

The study surveyed 3,821 women in the United States, Brazil, the U.K., France, Romania, Saudi Arabia, China, Singapore and Japan. Although responses indicate that money is still central to a woman's sense of security and independence, more than half (57 percent) disagree that the one who earns the most holds the power in a relationship. Going Dutch is also becoming more acceptable - only 23 percent think that men should pay for everything.

Although six out of 10 women disagree that men are more financially savvy, the findings indicate that the fairer sex still has a long way to go in sorting out their financial affairs. Only 26 percent are actively saving for their retirement. Three-quarters say they do not use a financial professional to develop a formal financial plan. More than half ignore the business pages of newspapers and fail to follow financial news to acquaint themselves with what's going on in the world of money (the French respondents were especially disdainful at 90 percent).

Of those who are married or living with partners, 86 percent of Chinese women claim that they have at least an equal say in the purchase of big-ticket items such as property and cars, third only after the U.K. (92 percent) and France (87 percent). Half of them heartily agreed with the statement "My partner's money is my money, my money is mine." And apart from having unrestricted access to their man's wallet, 77 percent say they can pretty much afford what they want without asking for money from their partner, second only after the U.K. (80 percent).

Larry Wu, director of Synovate China, says local marketers are very aware of women's decision-making power. "Socially, Chinese women would always claim that their men held final sway over big purchases - it's part of giving 'face value' to the

continued on page 72

names of note

Ipsos, New York, has named **Thomas A.W. Miller** regional senior vice president and managing director of Ipsos Public Affairs and **Nicolas Boyon** senior vice president of Ipsos Public Affairs.

Miami-based *Royal Caribbean International* has named **Alice Norsworthy** to senior vice president of marketing. Marketing research will be among her new responsibilities.

Plymouth, Minn.-based *Food Perspectives, Inc.* has named **Nancy Eicher** vice president of innovation.

Ingather research-denver has named **Jessica Venegas** call center manager.

In late September, Netherlands-based *VNU* announced that **Tim Callahan**, president of ACNielsen North America, was leaving the company as of October 3 to become CEO of the consumer group at Berwind, an investment management company. VNU said the search for a successor to Callahan was underway. In the interim, **Steve Schmidt**, president and CEO of ACNielsen and executive vice president of VNU Marketing Information, assumed direct accountability for ACNielsen's U.S. business, while **Pat Gardiner**, president of ACNielsen Canada, continues to oversee the Canadian business, reporting to Schmidt. Separately, VNU named **David Berger** senior vice president and corporate controller for its global operations. Berger's appointment follows VNU's decision last year to relocate its corporate controlling function from Haarlem, the Netherlands to New York.

Digital Research, Inc., Kennebunk, Maine, has named **Stephanie Fraone** senior research associate.

Lightspeed Research, Basking Ridge, N.J., has named **Sharon Albert** senior vice president of marketing and product development.

SSI/Bloomerce, the European arm of Fairfield, Conn.-based *Survey Sampling International*, has named **Michel Guidi** chief operating officer, Europe. Separately, Survey Sampling International has named **Tom Brophy** chief financial officer.

Diagnostics Plus, a State College, Pa., research firm, has named **James Fong** as vice president of sales and marketing.


Fong **Hamel**

Glastonbury, Conn., research firm *Connecticut InFocus* has named **Meghan Hamel** associate director.

Nashville-based *20/20 Research, Inc.* has named **Anacarla Castrillo-Baquero** facility manager of its new Miami focus group facility, which is scheduled to open in the first quarter of 2006.

New York-based *GfK NOP* announced that its **Judith Langer** and **Carolyn Setlow** have been selected for membership in the Market Research Council, a trade organization dedicated to promoting the field of market research.

AllPoints Research, Inc., Winston-Salem, N.C., has promoted **Brad Seipel** to market research strategist, focusing on the agribusiness and animal health markets.

Orem, Utah data collection firm *PGM, Inc.* has promoted **Marv Call** to marketing/sales administrator.

Cincinnati-based marketing consulting firm *ThinkVine* has named **Ritha Fellerman** principal of the market-


Fellerman **Dennis**

ing research area and **Kelli Dennis** senior analyst.

Indianapolis-based *Walker Information* has promoted the following associates: **Mike Schwarz** and **Rebecca Tearman** to SmartLoyalty project managers; **Mary Ann Garwood** to senior marketing specialist, Web and content management; **Stephanie Cox** to senior marketing specialist, brand management; **Susan Waers** to director, program management; **Lisa Orr** to corporate controller; **Jessica Kirsch** to program manger/stat analyst 1; **Amanda Loyd**, **Jennifer Haggerty** and **Diane Egbert** to program managers; and **Michelle Norman** and **Gary Szeszycki** to senior consultants. The firm has also welcomed new hires: **Kara Kadinger** and **Jamieson Prala** as project directors, **Troy Powell** as a statistical scientist, **Jennifer Avery** as graphics and reporting specialist, and **Shawn Windler** as a programmer/analyst.

In conjunction with the creation of its specialty healthcare group, New York-based *TNS Healthcare* announced the following

continued on page 82


What do more than
1500 of the leading
Market Research
companies have
in common?
They use
The Analytical
Group's Software!
WinCross - Crosstabulation
WinQuery - CATI/CAPI/WEB
Thank you
for making The Analytical Group's
software the most widely used data collection/tabulation
software designed especially for the marketing research community.

product and service update

Research Webinar series debuts

Quincy, Mass., research firm Knowledge inForm, Inc. has a new series of training Webinars for market research and business professionals. The hour-long sessions include a variety of market research and business-related topics and use instructional materials, reference guides, case studies, best practices and question-and-answer segments. The market research Webinars are targeted towards marketing professionals at all experience levels and small business professionals who need to learn about marketing and market research to grow their businesses. Current topics include: market research techniques - position and promotion; market research techniques - price; market research techniques - product; and using segmentation to identify and analyze customers. The business skills Webinars are targeted towards any business professional who needs to gain proficiency in a particular area. Current topics include: project management; the RFP process - from writing the RFP to evaluating vendors; Web site metrics - how to evaluate the success of your Web site; and how to design an effective survey. For more information visit www.knowledgeinform.com.

20/20 updates Qualboard

20/20 Research, Inc., Nashville, has launched Qualboard 2.0, the newest version of its Web-based application for conducting in-depth qualitative research using the Internet. Qualboard allows participants to be scattered around the globe and participate at a time convenient to them by using threaded discussions in a bulletin-board format. Qualboard 2.0, in addition to an updated look and feel, incorporates enhancements such as: 12 available color schemes and the ability to brand each project; complete typographic control for respondents, allowing them to use emoticons (images that convey mood or tone, like smiley faces) to give their responses personality; language sets, which allow Qualboard 2.0 to be used to conduct studies in English, German, French, Spanish and Japanese; and search-and-filter and coding functions to help moderators provide greater value to their clients. For more information visit www.2020research.com.

New version of Invoke on Demand

Invoke Solutions, Wellesley, Mass., has released Invoke On Demand, an upgrade to its online research platform, which is used by clients to gather insights from customers, prospects, employees, and partners. The Invoke On Demand release will be rolled out in three phases over three months: Invoke Platform Upgrade (5.0) includes a new "Instant Insight" PowerPoint report, on-the-fly chat with participants, real-time segment tracking, "Auto-Pilot" for session moderation, and more enhancements (release date: September 2005); infrastructure upgrade - includes the ability to host over 300 participants in a single live session (release date: October 2005); Invoke Insight Center - provides 24/7 portal-based access for Invoke partners and customers to create and run sessions whenever needed and includes authoring tools and session logistics (release date: December 2005). For more information visit www.invoke.com.

PDA module for The Survey System

Creative Research Systems, Petaluma, Calif., has released the PDA Module of The Survey System, its survey software package for Web, paper and phone surveys. The Survey System's new PDA Module offers features for conducting all types of interviews on Windows-based Pocket PC handheld computers. The Survey System supports both stand-alone PDAs and PDAs connected to the Web and automatically combines data from multiple handhelds. The number of questions in a survey and the number of interviews that can be conducted are limited only by the PDA's available storage.

The Survey System optimizes PDA Web surveys for the small screen size and slower connections of handheld computers. Users can modify survey appearance to show grid format questions with alternating color rows and other options. Sample PDA Web surveys can be seen at www.surveysystem.com/pdasurveys.htm. The Survey System's PDA questionnaires offer most of the same questionnaire logic features that are available for CATI and Web page surveys. All question files created in The Survey System can be used for PDA interviews (CAPI), Web page surveys, e-mail surveys, paper questionnaires and telephone interviews without further editing. For more information visit www.surveysystem.com.

Version 1.4 of Survey Solutions/EFM from Perseus

Braintree, Mass., research software firm Perseus has released an upgrade to its enterprise Web survey application, Perseus SurveySolutions/EFM. Version 1.4 features: expanded reporting capabilities - users can now create customized reports using a range of reporting elements including frequency tables and charts, banner reports, top box summaries, multi-dimensional crosstabulations, summary of means, correlation analysis and verbatim analysis. All reports can be distributed throughout the organization in PDF, MS PowerPoint or MS Word formats. Questionnaire design enhancements - new design features,

continued on page 76

research industry news

News notes

In response to the devastation caused by Hurricane Katrina, the **Marketing Research Association** (MRA) launched a researcher-to-researcher relief assistance blog, designed to aid any marketing and research professionals that have been affected by the storm. The blog, which is hosted on the MRA's Web site at www.mra-net.org/rrblog.cfm, allows research professionals to exchange information about what they are in need of or what they are able to provide their colleagues in need. For example, a researcher affected by the storm may require temporary office space, phone line and computer use, access to data from the Internet or help keeping track of active studies.

Within minutes of the blog launch in August there were nearly 50 postings with researchers from around the country sharing words of support and offers to help. "The blog is available to the entire marketing research community, not just MRA members," says MRA Executive Director Larry Brownell. "We have always been a cohesive community and this is just one small way that MRA can help."

Arbitron Inc., New York, has demonstrated that its Portable People Meter (PPM) system has the ability to track the newest distribution channel being adopted by terrestrial radio broadcasters - HD Radio technology - including its ability to multicast. Arbitron tested the PPM system with HD Radio technology to determine if separately encoded sub-channels could be tracked by its portable audience measurement system. The trials, which took place the week of July 28 on the digital channels of a radio station in one of the top 10 metros, showed that separately encoded multicast channels did not conflict with the main channel's encoding. In addition, the PPM codes, which were unique to each of the digital channels, were properly identified by the PPM. Previous tests with HD Radio technology have demonstrated that the PPM system can recognize a PPM code in a sub-channel that is encoded at a rate as low as 12 kilobits per second. The Arbitron Portable People Meter has performed successfully with other types of audio distribution and compression systems, including podcasting, Dolby, HDTV, satellite uplinks, Digicypher and Videocypher.

Separately, Arbitron Inc. announced that 189 Walgreens stores in the Houston area will participate in the market trial of the Portable People Meter system.

Arbitron Inc. also announced the formation of an advertiser/agency advisory council as a standing forum for collaboration with advertisers and their agencies. The first meeting of the council will take place on November 9-10 in Washington, D.C.

Germany-based **GfK-Nürnberg e.V.** announced its commitment to the Friedrich-Alexander University of Erlangen-Nuremberg to fund a chair in marketing intelligence. The GfK Association will donate around EUR 190,000 per year for an undefined period to fund a W3 position (funded professorship) as well as funding a scientific position, several scholarships and other resources for an initial period of five years. The scientific work of the GfK-funded chair will span the economics and social sciences faculty of the Friedrich-Alexander University of Erlangen-Nuremberg and will focus on consumer goods marketing, in particular, market research methods, the implementation of market information in marketing decision-making, consumer behavior and customer satisfaction. With the first and, as yet, only chair for marketing intelligence in a German scientific higher educational establishment, the University of Erlangen-Nuremberg intends to develop its marketing profile.

New York-based **NetRatings, Inc.** has initiated the Media Rating Council (MRC) accreditation process for its measurement products. Two Nielsen//NetRatings panels will commence the accreditation process: the NetView panel, based on an RDD recruitment methodology, and the MegaPanel of Internet users. The MRC will also examine the integration of data from Nielsen//NetRatings panels with server data, which will provide a single-source measurement currency for counting Internet users, while accounting for consumers' cookie deletion activity.

Acquisitions/transactions

Synovate has acquired **Market Equity**, an Australia full-service research firm. Headquartered in Perth and with offices in Sydney, Darwin and Adelaide, Market Equity is a business information consultancy with operations covering market research, marketing planning and knowledge management.

Global Market Insite, Inc. (GMI), Seattle, has acquired three companies - Seattle-based

continued on page 78

> by the numbers

By Andrew Cooper

European research panels growing, adapting

As most readers will be aware, the development of online panel research has been led by the U.S. Many U.S. companies have established panels with several million members and have seen their collective online share of the survey research market grow from 9 percent in 2000 to 29 percent today.

Historically the hungriest adopter of the Internet, the U.S. remains a global leader in Internet penetration and is now seeing its large base of dial-up users make the move to broadband in significant numbers. This conversion to high-speed access can only be good news for the U.S. online fieldwork industry, which is already worth in excess of $850 million (source: *Inside Research*, January 2005).

In contrast, Europe's online experience of market research has been slower to develop and panels have taken longer to build. From a U.S. perspective, this has fostered a number of negative perceptions of European panels. There is a perception in the U.S. that European panels are still embryonic, that they are limited in size and as a result provide restricted scope for research. Some countries are viewed as a lot less developed than others – for example, the U.K. is seen as more online than mainland and southern Europe.

There is also a perception that European panels are much less sophisticated than their U.S. counterparts. Whereas Europe offers generic consumer panels, the U.S. provides a significant number of strong business-to-business panels, e.g., IT decision makers and health care professionals.

Finally, there is a concern that Europe has provided fertile ground for professional respondents, who have infiltrated different panels in large numbers and as a result brought the panels' integrity and representation into question.

The truth is that while online research in Europe is still in its infancy, currently accounting for only 4 percent of the European survey research market, it is an industry that has made considerable progress over the past few years. In the right circumstances, European panels are now proving to be a highly effective alternative or complement to traditional market research techniques.

Editor's note: Andrew Cooper is managing director of London-based Research Now. He can be reached at andrew@researchnow.co.uk.

Ability to adapt

Perhaps one of Europe's main achievements in panel provision has been its ability to adapt to a complex, multicountry, multilingual and multicultural research environment. Whilst the U.S. panel provider is challenged to build panels large enough to represent 296 million citizens, the European panel builder has to be adaptable to cover up to 48 different countries, each with a range of languages and levels of online penetration. Panel size is a good example of how European panel providers have adapted according to specific country demographics. A panel size of 50,000 may be large for a country such as Norway (where it would represent around 1 percent of the population) but would be small to cover a larger country such as Russia. Recognizing


FOCUS POINTE IS NOW GLOBAL
European Facilities
Frankfurt
London
Paris
US Facilities
Atlanta
Boston
Chicago
Dallas
Denver
Los Angeles
New Jersey
New York
Philadelphia
San Francisco
Suburban
Philadelphia
Plus:
Worldwide Fielding
in 70+ Countries
One World.
One Call.
onecall@focuspointe.net
From US: +1. 888. 873. 6287
From Outside US:
+44. 20. 7908. 6600

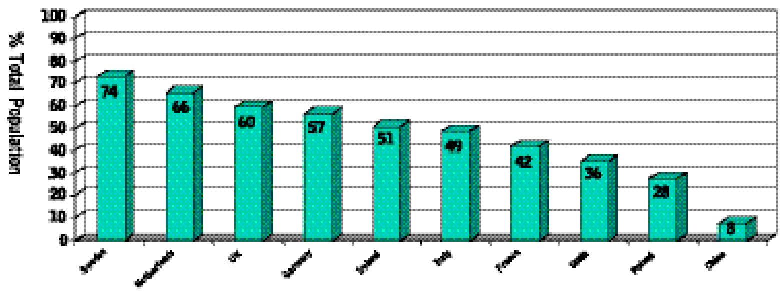
that a one-size-fits-all approach does not work is key to understanding online panels in Europe. Fortunately, European panel providers specialized in the European market can now provide advice on this. They can also coordinate multicountry projects from a central point, typically London, to allow seamless multi-country studies.

As in the U.S., the rapid growth of Internet penetration is playing its part in developing good panels. In Sweden, 74 percent of the population is now online and the Netherlands is not far behind at 66 percent. In Germany, the U.K. and the Republic of Ireland, over half of the population now has some kind of Internet access (Figure 1).

The latest analysis from The Economist Intelligence Unit, which has published an annual e-readiness ranking since 2000 to indicate the leading countries in terms of their openness to Internet-based opportunities, makes interesting reading. The 2004 rankings, published in April 2005, show Western European countries occupying no less than seven of the 10 top spots, with the U.S. edged into second place by Denmark.

The speed provided by broadband development has been a major influence, encouraging a higher volume of daily Internet use and capturing a mainstream, mass market audience, a large proportion of which bypassed dial-up altogether. There are now more than six million broadband subscribers in the U.K. according to Ofcom, the independent telecom regulator, and the European Commission estimates there are now 40 million broadband users in the European Union, up 70 percent on last year.

Figure 1: Internet Penetration – Some Country Comparisons
Source: Internetworldstats.com, July 2005



Aside from promoting panel growth, faster access has opened up a number of possibilities for the online fieldwork specialist, facilitating increasingly complex studies, e.g., ad testing, videostreaming and conjoint exercises. The business-to-business sector has expanded and companies are now building and selling specialist panels of IT buyers, health care professionals, decision makers and business travellers.

Taking such progress into account, forecasts of 100 percent growth per annum in the European fieldwork market do not seem too wide of the mark. However, before we herald the golden age of online research, other realities need to be considered. There is a wide range of panels offering respondent access and they do vary in quality and size. As online research is relatively new in the EU, some panels have not yet been utilized to their full extent. On a positive note, this means panels are fresh and not over-used but on the flip side not all will necessarily have a large bank of "active" members.

European fieldwork also throws up other challenges. Surveys naturally need to be to be translated and demographic questions, including socio-demographic questions, must be adapted to the local market. To be able to design your research to make it work well in all countries, you need to be aware of the differences involved. A good panel provider will have detailed local knowledge of each of the countries in which they provide panels and buyers should ask for this advice.

When considering using European online panels, it is important that buyers bear such factors and limitations in mind to ensure they exploit the full potential of such fieldwork. They will find that there are good panel partners, with high levels of repeat clients that have the necessary size, coverage and local expertise to deliver a successful EU research project. | Q

By Anne Orban

Ten tips for using interpreters in international research

For many marketers, the only contact they've had with interpreters is seeing them on TV sitting in booths at the United Nations in New York. Or perhaps they've been glimpsed standing discreetly between the presidents of Russia and the U.S., listening intently.

But in our increasingly global economy, marketers may suddenly find themselves facing situations such as these:

• Your U.S.-based project team has a market research project for site visits and focus groups in Shanghai, Tokyo and Seoul. Two members of the MR department are supporting a team of senior and middle management on this important initiative.

• Your American-based company wants to export product to the emerging economies of central Europe? What should they lead with?

• Your consumers in the States love your new snack but how will it be received in Spain?

To avoid getting lost in translation, here are 10 tips for effectively using interpreters for market research activities at all levels of your company.

1. *Interpreters work with the spoken word; translators work with the written word.*

The first tip is to understand the difference between a translator and an interpreter. People generally confuse the terms so be sure to use the correct terminology. A translator is someone who takes a written text in one language and turns it into a written text in another language. An interpreter works with oral communication. You would contract with an interpreter for real-time communication in a foreign country.

2. *Interpreters communicate what you mean in the hearer's language, not a literal translation of your words.*

In spoken as in written communication, you want to avoid the pitfalls of direct and inappropriate literal translation. If you've ever read a tourist brochure or menu translated from any language into English, you've likely experienced the problems associated with such literal translations. And there are plenty of stories in marketing research of these pitfalls. So realize what you'll get is not a literal translation – it's the appropriate rendering of your meaning in the other language.

3. *Prepare your interpreter with the context and special terminology of your business.*

Your interpreter will want to prepare for your special communication needs. Send a briefing document about the purpose and context of your activities and include any acronyms and special terminology that you'll be using. Plan for at least five minutes before the first meeting to introduce yourself and your colleagues and review the context. Please know that you can expect confidentiality from your interpreter. It's integral to the ethics

Editor's note: Anne Orban is director of discovery and innovation at Innovation Focus, Inc., a Lancaster, Pa., research firm. She can be reached at 717-394-2500, ext. 28 or at aorban@innovationfocus.com.

MALL INTERCEPTS

CUSTOM INTERNET SURVEYS

UNLEASH THE POWER OF INTERNET SURVEYS.

EXIT INTERVIEWS

INTERNET SURVEY PANEL

ONLINE REPORTING

LIVE PHONE INTERVIEWS

IVR SURVEYS

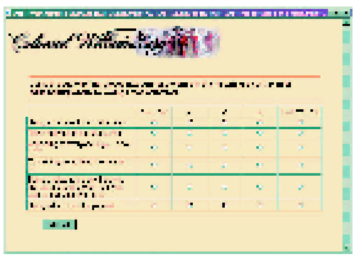
LET THE EXPERTS AT COMMON KNOWLEDGE HELP YOU ACROSS THE DIGITAL DIVIDE.

MAIL SURVEYS

INTERNET / IVR INCLUSIVE™

KEYPUNCH DATA

MOBILE INTERVIEW AND DIARY



Advanced, Proven Internet Technology
Cross the digital divide with Common Knowledge helping you negotiate every turn. We combine advanced, but proven, technology with more than 15 years of solid marketing research experience. We can quickly put the full potential of Internet surveys and comprehensive online reporting solutions to work for you.

Experience and Expertise with Complex Programming
Our proprietary software, coupled with our experienced research-trained programmers, enables us to expertly program any customized Internet survey. However you design it, we can program it — from complex logic and algorithms, to simultaneous row and column rotations. Static or timed exposure graphics, sound, video and various interactive visual stimuli are all part of our everyday programming.

We can customize your reporting to meet your needs and those of your clients. Our unmatched flexibility allows for pre-formatted or ad hoc reports that can be changed and updated as desired.

***Your2Cents®*: *Common Knowledge's* online opinion panel**, *with* **millions of research-only members**, *including adults, teens and children. We also have millions of potential B2B survey participants, including small business owners, IT professionals, medical specialties and ailments. Respondents delivered to your programming or ours.*

Panel profiling information with **more than 500 target selects**, *including household demographics and in-depth information on dozens of major interest, usage and purchase categories. Each member's survey participation is limited which reduces the effect of "professional" respondents.* **Exclusive multi-mode sampling and invitation systems aid in making your survey more representative and our panel more responsive.**

your2cents® online opinion panel

Flexible, Affordable, Quick and Reliable Data Collection for Research Firms
We stress above all our flexibility to deliver what our clients need, the way they need it. And, because we perform all our digital services in-house, we can offer affordable prices and faster turnaround times. Best of all, we won't compete with you. Contact our experts today to discuss putting our digital data collection and reporting solutions to work for you.

COMMON KNOWLEDGE RESEARCH SERVICES®

Home Office
14200 Dallas Parkway • Suite 140 • Dallas, Texas 75240-8897 • 800-710-9147 • Fax 972-732-1447
Email: getinfo@commonknowledge.com • Web: www.commonknowledge.com

Eastern Sales Office
800-461-0790 • Fax 201-549-0442

Western Sales Office
866-588-7838 • Fax 425-696-2250

of the profession.

4. *Prepare yourself and your team for the consecutive translation format.*

The team going on those customer/supplier site visits in Shanghai, for example, would use the interpreter in a consecutive interpreting format. Consecutive translation is also the format you will typically use in focus groups, for two reasons. Not many facilities have the simultaneous interpreting equipment which enables you or one of your team members to moderate. Remember to modify your expectations of what you can cover in an hour because you'll be doing everything in two languages. Sometimes your interpreter may use a format that is between consecutive and simultaneous translation. This means she'll be speaking at the same time as soon as she understands what the primary speaker is saying. At first this may seem intrusive but everyone will get used to it very quickly and it does save time! A professionally qualified interpreter is trained to do this - but do not expect it from your bilingual colleague.

5. *Pause regularly for the interpreter to do the job of involving the listeners.*

Remember that your listeners want to know what you are saying as quickly as possible. Think in terms of a sound bite and pause after a few sentences so your interpreter can engage your listeners in what you are saying. If you speak for too long without a pause, the interpreter will find it more difficult to render your meaning and your listeners will get bored or lose focus.

6. *Use straightforward language - avoid slang, plays on words and attempts at humor.*

Since the goal is effective communication and the interpreter is there to facilitate communication, do everything possible to ensure that the words you use communicate the meaning you want relayed to your listeners.

7. *Maintain eye contact with your counterpart, not the interpreter.*

The interpreter is a facilitator and when the process is working well the interpreter will become invisible in the conversation. To accomplish this, avoid the temptation to talk to the interpreter. Maintain eye contact with the person you are addressing and use your ears only with the interpreter.

8. *Address your foreign counterpart directly in the first-person and use a natural pace and volume.*

Monitor your speech patterns to avoid use of the third-person such as "Tell him…" or "Does Madame du Bary think…" Talk directly to your counterpart as if you understood each other perfectly. Remember too: don't ratchet up your volume or speak more slowly as a psychological compensation for a foreign listener.

9. *Everything said in front of your foreign counterparts must be out in the open.*

Remember that conversations in English between you and fellow team members if conducted in front of your foreign counterparts must understandable by everyone. Don't forget to conduct those conversations with the same protocol as you use when addressing your foreign counterparts directly.

10. Treat your interpreter well.

Remember that if you ask your interpreter to work with you through a meal, allow them a chance to eat and drink. Always ensure that the interpreter is in a position to hear everything clearly. Give your interpreter some breaks. Don't embarrass your interpreter or work against him/her linguistically or with non-verbal cues.

Good communication for all

There is a great deal of satisfaction for both you and your interpreter when things go well. With these 10 tips, you will gain the respect and cooperation of your interpreter and good communication for all will be achieved. | Q

By Anna Lilleengen

A storied destination

Scotland's tourism agency revamps ad campaign to attract European visitors

The proliferation of low-cost air carriers and the expansion of their pan-European route network means European consumers now have a greater choice of vacation destinations than ever before. Consequently, the need for established tourist destinations to market themselves appropriately, and communicate their unique "reasons to visit" clearly and effectively to their target audience, has become requisite.

As tourist destinations face up to increased competition for market share, VisitScotland, Scotland's national tourism agency, approached U.K.-based Nunwood Consulting in 2003, to develop and instigate a qualitative research program, the first of its kind in nearly 10 years. The research was intended to determine consumer wants and current brand perceptions within the three key markets of France, Germany and Spain. The resulting insights would then be used to adapt and refine the group's future marketing and creative communications strategy, with the ultimate goals of repositioning the brand "Scotland" within the tourism sector and reigniting consumer interest within the three stated key territories.

Editor's note: Anna Lilleengen is client consultant at Nunwood Consulting, a U.K.-based research firm. She can be reached at annalilleengen@nunwood.com.

The process

Nunwood carried out a series of in-depth, qualitative workshops at six different locations within the three countries. The success of the research depended on careful field coordination of the international research and on the success of ongoing partnerships between Nunwood and research agencies in each of the three countries. Being aware of the cultural differences in each of these countries, Nunwood was able to work with each agency's strengths and weaknesses, allowing them substantial freedom to conduct their leg of the research "their way," without compromising the quality of the overall project.

The team worked with a carefully chosen respondent group which included habitual visitors to Scotland as well as prospective strategic targets, in order to ensure that the research outcomes were relevant to both current and potential future consumers.

Within the groups, Nunwood reviewed respondent associations with a number of nations and holiday destinations, not revealing Scotland as the subject of the research until quite late in the process, in order to contextualize their responses and gauge perceptions. Nunwood went on to look at elements of activity that appeal when on a vacation or short break, in order to understand the key hooks and triggers that would appeal to different vacationer types.

The research went on to utilize existing imagery of Scotland to elicit spontaneous responses based on emotional experience. Overall it could be broken down into a series of key questions:

• What are the current consumer perceptions of the brand Scotland?

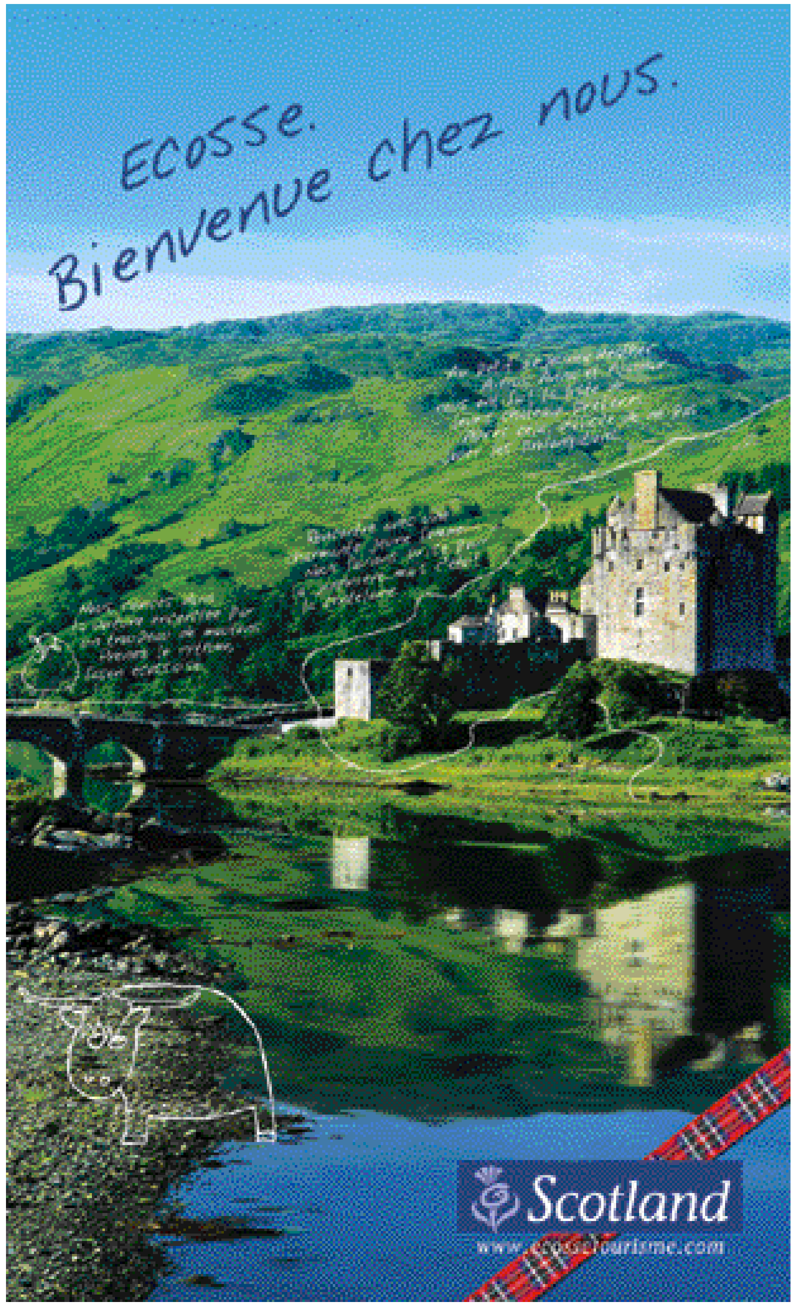
• Which aspects of the country are most appealing/would motivate a person to visit?

• Which of these aspects then appeal specifically to each of their market target countries, and thus would a generic, pan-European communications strategy be feasible? (This would represent a huge cost saving.)

Unmet needs

Once the research was completed, the debrief - in this case, a facilitated workshop-style process with a carefully constructed audience - yielded remarkable insight and identified three core and as-yet-unmet consumer needs:

• Social engagement/cultural immersion. Ad executions should advance from traditional, purely landscape-oriented messages to create the expectation within a visitor that they'll experience high levels of social interaction with the archetyp-



Research showed that VisitScotland could use a pan-Europe ad campaign, keeping the tagline and copy constant and changing only the language in each execution, as in this version for the French market.

al friendly, welcoming, indigenous people.

• Discovery and learning. The need for the brand to communicate feelings of unique discovery, surprise and the capacity for personal learning.

• Flexibility and independence. Future communications should appeal to more spontaneous, proactive, "flexible" tourists with few pre-ordained plans.

Another important piece of information to emerge from the data was that these needs were consistent across all of the defined national markets, allowing for the generic, pan-European campaign that VisitScotland had hoped for.

The re-brand

The next step was to utilize these findings to develop and refine new, effective brand creative. The old campaign was based on a traditional and generic approach to advertising vacation/short-break destinations: a simple but heart-stoppingly beautiful picture of the destination, plus an image of a calm and relaxed vacationer. The initial wave of qualitative work showed that to "tourers" (the main segment targeted in this creative campaign), this kind of imagery was not particularly attention-grabbing or emotive. Rather than suggesting a myriad of vacation possibilities, and most crucially, the ability to explore for themselves, these kinds of images suggested isolation and an "off the shelf," non-bespoke, vacation solution.

VisitScotland commissioned European advertising agency Consellgruppe to develop an insert- and print-advertising campaign based on the key recommendations outlined following the research.

"In contrast to previous campaigns, which left consumers very much on the outside looking in, we wanted this creative to be experiential and engaging, with the brand talking to the consumer rather than at them," says Andreas Kleissl, management supervisor at Consellgruppe.

The resultant work, christened "the white line concept," answered the brief, as defined by the research recommendations. Any engaging creative for VisitScotland needed to underline elements of: sociability and cultural immersion, discovery and learning, and freedom and independence. Nunwood tested the creative mock-ups across the three nations in a second wave of qualitative workshops several months later and made final edits based on this. The designs and the concept researched remarkably well, with the friendly and informal tone really appealing to the tourer segment.

"White lines" consists of a series of panoramic, visually rich landscape/scenery shots, featuring the tagline "Scotland, Welcome to Our Life."

While the composition of these images hints at the wealth of things to discover in Scotland, a white, hand-drawn line runs through the scene, tracing the path a visitor could take. Short, scribbled stories, written in the first-person tense and dotted at points on the line, are indicative of the situations a visitor could experience during their time in Scotland.

Story examples include:

"I spoke to a lovely lady, thought she was the gardener, but turned out she owns the castle."

"Got stuck in a herd of sheep - the Scottish way to slow down your life."

Well-received

To substantiate initial positive feedback, and make sure that this line of creative was on-track, on-brand and effectively delivering the key messages all parties had agreed upon, Nunwood conducted a series of one-on-one conversation studies in France, Germany and Spain, to gauge direct consumer response on the new campaign. With the exception of a few small refinements, the creative was very well-received and the new campaign was promptly rolled out across all three European markets.

Figure 1: Germany - Brochure requests

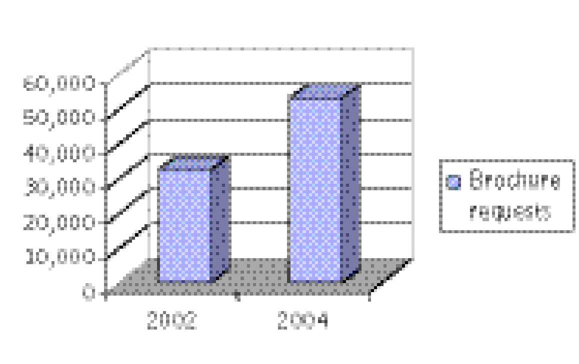
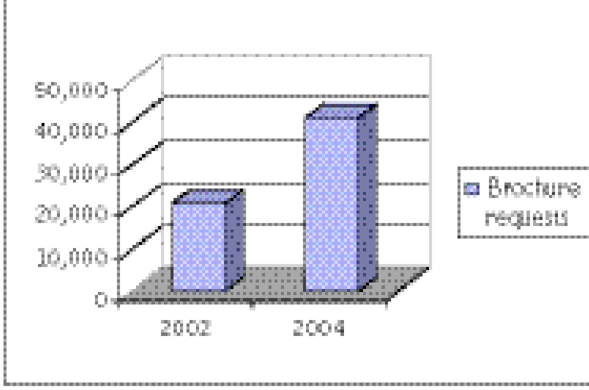


Figure 2: France - Brochure requests



The final stage of the project was the post-execution evaluation, which was undertaken by another independent research agency to ensure objectivity. The goal in this instance was to quantify the conversion from potential visitors to likely visitors as measured by monitoring requests for VisitScotland brochures and tracking any increase in traffic to the official Web site.

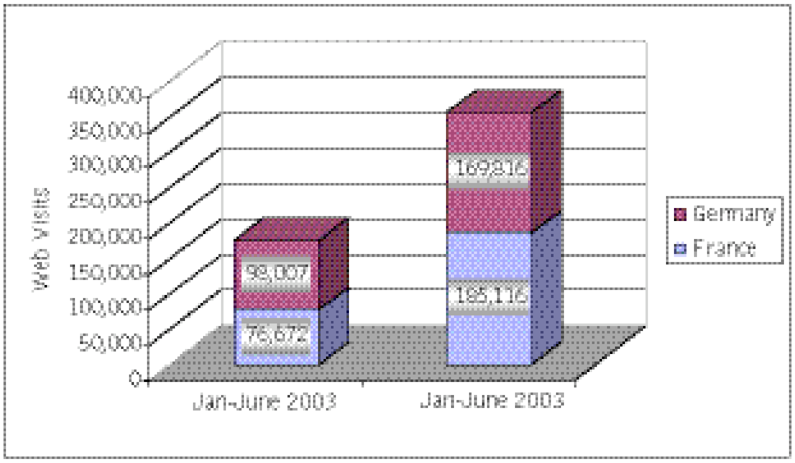
A conversion study in Germany and France (no figures were available for Spain) showed an increase in return on investment from 13:1 in 2002, to 25:1 post-implementation of the new campaign in 2004. This increase in ROI was qualified by:

- An additional 180,000 VisitScotland Web hits were generated by traffic to the French and German gateway sites - an increase of 200 percent from the 2003 figures.
- Brochure requests in 2004 vs. 2002 had increased by 68 percent in Germany, and 126 percent in France (Figures 1 and 2).

Refresh the understanding

The findings helped refresh VisitScotland's understanding of its three key European markets. Previously, insight was based on ad-hoc research and inherent knowledge, hence this research helped to "open up the box" and create a renewed focus on meeting the needs of Scotland's very specific (and var-

Figure 3: Web Site Visits From Germany and France, 2004 vs. 2003
(2002 not comparable)



ied) visitor types. One key finding is that while there are very clearly demarcated types of visitors to Scotland ("city breakers," who typically make short visits to major European cities; tourers; walkers), these correlate closely over the three European markets in question. The perceptions of Scotland were, in other words, remarkably similar and strongly defined across the markets. The conclusion, borne out by the second wave of qualitative workshops, was that the resulting European creative campaign should be pan-European and not individually targeted to each market, resulting in a huge cost saving to VisitScotland.

"The results prove that a centrally coordinated campaign with a consistent approach and consistency of message has resulted in more efficient use of budgets and increased interest in Scotland as a holiday destination," says Annabel Kohler, international marketing manager, VisitScotland.

"The success of this project can be largely attributed to VisitScotland's insight into our own research needs, and our foresight in developing long-term partnerships with Nunwood and our creative agencies, whilst maintaining a wide internal audience.

"By employing a flexible, inclusive approach, Visit Scotland has increased insight into its varied European customer base, and has utilized this insight to leverage a massive increase in Scotland's visibility and positioning as a must-visit destination. And, most importantly, the business has made a substantial cost saving by successfully using one generic creative execution across Europe rather than a bespoke campaign in each country." | Q

international research

An enriching process

By Martha C. Rivera

In-situ research in Latin America

As a qualitative research method, in-situ research (in-home, in-store, in-car, etc.) was not intended to simply shift in-depth interviews from a traditional interview facility to a more natural setting. Questioning a consumer in his or her home does not automatically cancel the artificiality of the situation. To ask a housewife, for instance, how she prepares a particular dish while interviewer and interviewee sit on her couch may not be significantly less artificial than asking her the same question in a nicely furnished facility. She does not regularly prepare the dish in either setting. Even if the interview were conducted in her kitchen, artificiality may not be 100 percent eliminated.

The synergy produced by observation, participation and questioning is the real value of in-situ research. This goal is why anthropologists got out from behind their desks in the early twentieth century. We modern consumer researchers should do the same. With in-situ research in Latin America we encounter and must deal with not only cultural differences expressed by consumers but also by local research teams. Recognizing these differences leads to a more accurate and comprehensive understanding of the Latin American consumer.

Being on the same page

Ethnography is a coherent research approach encompassing a solid conceptual framework. It is expected that the ethnographer will perform three different types of activities while interacting with the interviewee during any in-situ research: observation, participation and questioning.

Observation

Observation of a behavior within its habitual context by direct observation or videotaping and photos is one of the most powerful sources of information about consumers. It reveals details that would never be reported by the consumer. Some of the insights resulting from the use of observations as a key element of consumer insights research are:

• *No person can fully report his or her own unconscious behavior.* Some behaviors that became habitual long ago are just ignored. You need to carefully think through how you brush your teeth before you are able to describe it, and despite your best effort you always miss some component of a behavior. Due to the fact that consumers do not recognize those minimal or automatic components of their behavior, they are not

Editor's note: Martha Rivera is senior research associate - Hispanic research at Doyle Research Associates, Chicago. She can be reached at 312-863-7614 or at mrivera@doyleresearch.com.

reported to the interviewer. Hence, ethnographic observation can bridge these gaps.

During an in-situ research study conducted in Venezuela, in an ordinary bathroom I saw a large multicolored, perfectly round sphere made of small bits of body soap. The interviewee explained that he usually compressed together these bits of body soap when they had become too small. None of the previous interviewees had reported something like that, but all subsequent participants were asked what they regularly did with the last pieces of their body soap. Most of them automatically placed the old small piece to the new soap bar without another thought. Supplementary questions revealed that the flat form of the client's soap bar was thought to facilitate this, and that these consumers actually looked for that particular brand for that reason. Hence the client abandoned its plan to change the shape of its soap.

• *People's reports of their own behavior always contain at least a small portion of biases and inaccuracies.* Subconscious aspirations - and the human being's natural need for resolving the gap between what they know about their own behavior and what they do not - and other factors explain the inconsistencies between what people report and what is found out through observation.

While testing a new type of package for pre-prepared meat, Mexican housewives claimed that they would readily buy any pre-prepared food item because it offered the convenience that they reportedly expected from all types of products. However, it was observed that their refrigerators were filled exclusively with fresh food items, thus suggesting that these housewives habitually prepared their meals from scratch and did not consume any form of pre-prepared food. Further questions about such apparent incongruity confirmed this inference.

• *Rarely is any person able to recognize and accurately describe the contextual triggers of their behavior.* Because of repetitive occurrences within a specific context, there are subconscious associations and interdependent or isolated components of a particular environment - all of which can ignite behaviors. Often the person is hardly aware of the cause(s) of these behaviors.

Contextual triggers of the behavior rarely act alone. Several types of them converge to exert influence on people's behavior. They might be physical (i.e., the actual place), time-related (routines exerted repetitively at specific hours or dates), social (people who are involved in the behavior or are present while it is performed), and behavioral (previous and simultaneous behaviors, such as chain behaviors, whether they are directly related to it or not).

Feeling the impulse to wash clothes while passing by a full dirty-clothes bag is an example of a physical trigger; to feel the same impulse on Tuesday early in the afternoon because that's when such activity is usually performed is an example of time-related triggers. Lighting a cigar as soon as you see a particular friend who is often present while you are smoking exemplifies the action of social triggers. That you automatically pick up a beer after preparing popcorn and turning on the TV to watch the game is a good example of a chain-behavior trigger.

In-situ observation of the investigated consumption behavior will reveal these contextual triggers, thus generating otherwise unattainable insights. While visiting Colombian housewives to learn about their habits related to the preparation of empanadas (which are fried, filled pastries, similar to burritos but fully enclosed and small) I noticed that most of them stored cooking oil right next to a solid version of the same product which is considerably cheaper and performs the same function but lessens the flavor of the food. (Both varieties are regularly consumed in low-income households, but housewives tend to save the liquid oil for special plates.) Many reported frying the empanadas with liquid oil; however, as they began taking out the ingredients from their pantries, some interviewees glanced at the solid oil and decided to use it instead of the liquid. When asked about this change in their habits, they related that seeing the solid oil was a reminder of the higher price of the liquid and led them to prefer the solid.

Participation

Participation is, so far, the least frequent of the activities conducted in-situ by consumer researchers. Long ago anthropologists learned about the immense value of experiencing the investigated behavior to gain insight about it. We marketing researchers often limit our in-situ activities to plain questioning, pictures or video-taping and some observation. However, no immersion into the investigated consumption behavior is complete unless the researcher participates in it.

In-situ participation means that the researcher gets involved with the consumption behavior while it is performed. Rather than solely observing, the researcher would develop sensitivity related to the behaviors by means of, among other things, assisting the consumer to perform the investigated behavior, being part of the social situation when it is conducted, and repeating some of the consumer's actions to learn from them. As a result, insights will be produced by a visceral apprehension of the actions and reactions related to the behavior and by a psychological connection to it.

Not all consumer behaviors are suitable for researcher involvement. Ethical and practical issues restrict the participation of the researcher in some activities, while participating in some others is not a real need. However, in-situ participative research is indicated when respondents belong to an ethnic or social group that is very different from the researcher's, as is the case for U.S. companies interested in Latin American or U.S. Hispanic consumers. In fact, participative methods were originally developed as a practical way to better understand unfamiliar ethnic groups.

Some specific business situations in which participative in-situ research was helpful include:

• *Learning about motor or sensorial responses involved in consumption behavior.* We once tested three different ball sizes for roll-on deodorant bottles. Female Ecuadorian consumers were provided with three choices and were requested to use them and to loudly describe their sensations. We, the researchers, were given the same three and sought to imitate all the movements performed by respondents, thus obtaining a deep sensory and motor comprehension of their verbal response.

• *When researchers' unfamiliarity with the product makes it hard to interpret verbal reports from consumers.* We were commissioned to investigate the general mindset of Venezuelan truck drivers in regards to air filters, so short in-truck trips were performed. The truck drivers were requested to teach the ethnographers about the replacement of an external air filter on the truck's exhaust system. As a result, the researchers were able to remove the air filters from their cases and to identify the right moment to replace them. Most drivers used their air filters far longer than recommended by the manufacturer. The truckers waited until the filters got to a particular tone of gray, which we were able to reproduce for the written report. The manufacturer was able to prepare a simple sheet correlating the different degrees of gray with increasingly adverse consequences for the truck's performance.

• *When new ideas to improve or develop products are sought.* We conducted an ethnographic study to understand decisions of mothers related to the food items they gave their children for lunch at school. It was learned that mothers regularly gave them bags of potato chips, and we learned that the children struggled to open them. We also experienced difficulties with them. Apparently children did not regularly consume the chips but did not return them home. In response a different sealing system for the bags was created.

• *The desired answer to a particular consumer-related question has proved to be hard to find.* I was once sent to visit a little town of fishermen who historically had been purchasers of large numbers of batteries. Without apparent reason, the fishermen markedly decreased their purchases. During my visits to their homes, I learned that they had recently devised a method to check if the battery still had power. It was a complicated process that included, among other things, burying the batteries underground and storing them in a freezer for 24 hours. I found it difficult to believe that this process led them to detect power but one of the fishermen placed a tiny metallic sheet at the bottom of the battery and told me to put my tongue on the top. "You will feel a flow of energy similar to what you feel when your boyfriend kisses you," he assured. It was true.

Questioning

As discussed, in-situ questioning is only one of the three key elements interacting to produce synergistic outcomes from in-situ research. While consumer insights obtained by means of more traditional methods (such as focus groups and in-depth interviews) rely on respondents' answers to either direct questions or projective exercises, insights from in-situ studies depend on observation and participation as much as on those answers. Hence, in-situ questioning has some distinctive functions:

• *Interfacing with observation and participation to interpret what is watched or experienced.* A permanent exercise of "thinking on your feet" is needed to achieve genuine synergy between questioning, observation and participation. "Can you show me?"- and "Can you teach me?"-type questions are constantly inserted in the interview guide. Hard conclusions are not to be drawn while the in-situ visit is being conducted. Sensitivity is needed to detect when and where the researcher should participate in the consumption behavior or should conduct more detailed observation.

To support the introduction in the marketplace of a new type of salt with a fluoride additive, I visited Colombian housewives. While one of the interviewees was talking about the new product, I noticed that pronouncing the product name was difficult for her. I also tried to pronounce it but had trouble myself. After two or three more interviews my tongue was still blocked, as were those of the interviewees. Launching the product with that name would be a serious deficiency in Latin America because the vast portion of grocery shopping is done at small stores where goods are obtained from attendants behind the counter. Hence, after the initial four in-homes we asked respondents for a pronounceable name for the fluoride compound. One of the names they suggested still forms part of the brand name.

• *To guide the respondents through an unusual research experience that is fun for them and provides useful information about their behaviors.* Being visited by a research team that takes photos, observes everything and participates in daily activities is trying for any consumer. Discussions on ethical issues and rapport techniques are mandatory for researchers, but they are not the focus of this article.

Instead, I want to point out that proper in-situ questioning can and should lead the consumer through a pleasant research experience in which he feels he or she wants to show more, say more, and share more with the researcher. During an in-situ project about lingerie, young female executives showed us some of the items they wore daily and others they reserved for special occasions. At some point the question "Is it complicated to care for these items?" was asked. As a response, several of the interviewees spontaneously offered to show us how they washed them, and some actually did it in front of us.

• *To address inconsistencies between an interviewee's responses and a researcher's observations or experiences.* This is one of the hardest moments of the in-situ research. By making it apparent that some contradictions have been identified, the researcher may make the Latin American consumer feel shy and stop them from participating candidly. However, inconsistencies between what was said and observed must be addressed. In fact, that is one of the critical reasons why in-situ research is conducted.

In order to learn how Peruvian housewives cooked a dehydrated mix-of-grains soup, whose preparation instructions specifically included keeping the whole package of grains boiling in a tightly covered pot, several in-homes were conducted. Most respondents rattled off by heart the cooking instructions when they were requested to teach us their methods to prepare it. However it was observed that many of them would interrupt the boiling process in order to take out the peas, and then heat it up again to boiling. Rather than saying, "Why do you not stick to cooking instructions?" we asked respondents if the peas were cooked already. In addition to learning their reasons for taking the peas out earlier, several other possible changes to the instructions were revealed.

Latin America is on a different page

Differences related to marketing research practices in Latin America and the U.S. may discourage large international companies from conducting consumer insight studies for their business in Mexico or Central or South America. However, the size of the market – among other factors – makes Latin America particularly interesting for most business sectors, hence making consumer research mandatory. Understanding and accepting those differences will make the research process flow smoother and will produce more useful consumer insights, in turn providing better support for business in the region. Some of the differences that we at Doyle Research Associates have found while conducting in-situ research projects in Mexico and Brazil are described below.

Recruiting

• Developing screeners for U.S. Hispanics is complex work because they must include particular variables such as: preferred language at home and work; immigration generation (to obtain even samples of first- and second-generation respondents); and years attending Spanish or English school as an indicator of the participant's language ability. Developing screeners for Latin American consumers is a different story. We have not often seen in Latin America our long, closed-ended question screeners but have come across either open questions or short, closed-ended questionnaires. Hence, Latin American field-work personnel doing interviews to identify potential respondents may find it difficult to handle extensive screeners.

• We have also detected important cultural differences related to how the screener questions and instructions are assimilated. While it is true that translation is a factor, wording also plays a key role. For example, you can indicate to a U.S. interviewer "accept all boxed checks" and he will understand. However, this expression translated to either Spanish or Portuguese will not make sense within the context of the purpose for which it was stated. Mexican or Brazilian interviewers would expect a clearer expression such as "accept all respondents who said yes to questions two, three or four."

Incentives

• Giving cash incentives to participants in qualitative studies is not a popular practice in most countries in Latin America. Mexico and Puerto Rico are the exceptions. Surely consumers in other Latin American countries would not reject cash incentives, but they are not used. Rather, most marketing research agencies give them either an "expensive" present or a store card. Presents may include small home appliances, fine perfumes or liquors or other foreign goods. Big-box or department store cards are the most popular. Not longer than one decade ago or so client companies still used to give respondents baskets of their products. They were highly appreciated because they were seen as a demonstration of genuine, personal gratitude of the client company toward consumers.

Scheduling

• Differences in business hours are a factor while scheduling in-situ projects in Latin America. In Mexico City, for instance, lunchtime is seldom earlier than 2 p.m. and takes up to two hours; hence, most potential respondents do not leave their work before 6:00 p.m. Sao Paulo's working hours are similar to those in the U.S. While recruiting suppliers would find available respondents at literally any time, those who could participate during working hours hardly would be genuine representatives of average consumers. Very likely they would be unemployed people with a very reduced buying power (if any), thus their purchasing criteria are not necessarily typical.

Participants

• Shyness and modesty in front of foreign people are distinctive characteristics of the Latin American culture. While clients want to be present during in-situ studies, their presence could inhibit Latin American consumers or could result in responses founded on their subconscious desire to be agreeable to the foreign person. Very often the visited consumer will ask their visitors if they want something to drink. If the visitor accepts that offering and actually takes some water, soda, coffee or juice, the respondent can relax and feel more comfortable with the entire situation.

• Several members of the family will usually be present during in-home visits. Regularly, the research team will be first seated in the living room and often most present members of the family will come to greet the team and stay. Making them participate in all activities performed during the visit is not only an invaluable additional source of insights, but it also contributes to the comfort of both consumers and research teams.

Videotaping, filming, taking notes

• Security is a real issue in Latin America. People are constantly afraid of being robbed at their own homes. That is one of the reasons why research teams may unexpectedly be denied permission to videotape or take pictures. Even if the participant had previously agreed, he/she could simply change his/her mind at the last minute. Because of this, research teams must be quite skillful at observing. In order to be prepared for this eventuality and also because our care for the quality of our work, we regularly include an observation guide within the in-home guide.

• We have found that taking notes while conducting qualitative research with Hispanic respondents (either U.S. Hispanics or Latin Americans) can hamper interviewee spontaneity and participation. To the respondent, the qualitative sessions can resemble interviews before authority figures such as physicians, law enforcement officials and others, thus increasing the cultural shyness already mentioned.

Very enriching

In-situ research in Latin America can be a very enriching experience in both the professional and the personal spheres of life. It is an invaluable opportunity to learn from Latin American consumers rather than merely acquiring knowledge about them. Consumer insights obtained through in-situ studies are priceless keys to open client companies' minds towards a region of the world whose consumers have proved to be loyal and highly profitable for most business sectors. | Q

international research

Success in any language

By Beth Podrovitz
and Jiri Stejskal

In today's global economy, marketing research companies are faced with cultural and linguistic challenges which can only rarely be handled using internal resources. In order to be able to communicate with non-English speakers – be it a panel outside of the U.S. or Hispanics or other minorities in the U.S. – marketing research companies outsource the translation of surveys and other documents to outside vendors. Given the low entry barrier for establishing a translation business, the U.S. market is literally flooded with translation service providers. The question then arises: How do you select a translation service provider that will suit your needs? The short answer is that generally, you get what you pay for. The long answer is given below.[1]

Tips for buying translation services

Translator versus translation company

Translation is certainly the key component to getting your message across to your audience, and this task is performed by qualified individuals – the translators. Some marketing research companies have translators on staff, particularly those who specialize in the U.S. Hispanic market. Such an arrangement makes sense and is the most cost-effective. But what if you want to add a new language or conduct a survey in many languages? Typically, marketing research companies in such situations outsource the translation. This is where it gets interesting. How do you select your vendor?

The role of a translation company is not just to translate. In fact, most translation in today's market is done by independent contractors – the translators – who work for translation companies. In a recent survey conducted by the American Translators Association, work for translation companies accounts for approximately 60 percent of translators' revenues.[2] The value added to the translation process by the translation company is the ability to select translators and editors with appropriate linguistic and subject matter expertise, and the ability to manage multilingual projects.

The project manager in a translation company coordinates the workflow and is the single point of contact for the client. He or she makes sure that all language versions are prepared in the same format and that all steps necessary to produce a quality translation are taken. By working with networks of translators skilled in different languages and disciplines, translation companies are able to meet a variety of needs, and translators are matched to the specifications of your project. The over-

Editor's note: Beth Podrovitz is a senior project manager, and Jiri Stejskal is the president, of Elkins Park, Pa.-based CETRA, Inc., a translation service provider. They can be reached at 215-635-7090 or at info@cetra.com.


What are they thinking?!?

sight and coordination provided by translation companies are critical for multilingual projects or for projects requiring additional services such as desktop publishing or work with html files. In addition to coordinating the workflow for large projects, translation companies often prepare and maintain glossaries in specialized fields.

Cost of translation

Consider the cost, not just the price. You can pay a low price and incur high costs because the translation you receive is of substandard quality and either has to go through additional revisions which are expensive, or, even worse, if used as-is, can cause incalculable damage to the name and credibility of your company. Conversely, you can lower your overall costs by using a translation service provider who consistently delivers high-quality services.

In the U.S., the rates for translation are typically given on a per-word basis. When you ask a translation company how much they will charge for an eight-minute survey, their first response will be, "Do you know how many words that is?" The word count can be determined easily by using the word-count feature in MS Word, and there are numerous other applications that can perform this task. However, several questions arise: What constitutes a word? Should I pay for a list of brand names that does not require translation at all? How about html tags? And tables with numbers or checkboxes only? Does your file include instructions for an interviewer or a programmer that do not require translation?

To be sure, MS Word will count each word indiscriminately. It is up to you and the translation company to determine which portions of text are not to be translated. If you receive a quote from a translation company based on word count, make sure that you are charged for the text that actually needs translation.

According to a survey conducted by the Common Sense Advisory, Inc.,[3] rates charged by translation service providers typically range from $0.17 to $0.29 per word. These rates are all-inclusive (not only the translation but also the project management time, editing and quality-assurance procedures) and cannot be compared to the rates charged by individual translators. The rates at the lower end of this range typically apply to Spanish and Portuguese. The higher-end rates apply to Asian languages and right-to-left languages (such as Arabic and Hebrew). When negotiating per-word rates, it is advisable to agree in advance on the basis of the calculation of the number of words. Word count of the same text in two different languages can differ by as much as 40 percent - this is true especially for Asian languages. It is a good practice to use the English version as the basis, regardless of whether it is the source or the target language. If the source text is in English (which is typically the case when translating marketing research materials, save for the translation of survey responses), the word count is clear to all involved parties from the beginning and unpleasant surprises can be avoided when the time comes for invoicing.

Purpose of translation

Be sure that you tell your translation service provider how the translation will be used. Is it a script for a telephone interview? Is it an online survey or a printed questionnaire? This is particularly important for Asian languages - they use different characters depending on whether a survey is written or spoken. The intended use of a survey is critical information for a translator. Identifying who will take the survey helps the translator establish the appropriate tone, style and register for the target language. An online survey could be less formal because it may be targeting a younger, computer-savvy audience. A CATI survey about medical equipment targeted to doctors may need to be more formal and technical.

Differentiate between a for-publication and for-information level of quality. If you are distributing an online survey in 15 languages, you will want to take extra care to ensure that everything is in line with what you wanted and that an appropriate style and register is used, in addition to having text free of grammatical and spelling errors. If your customer service department receives an e-mail with a query in another language, the translation does not have to be of for-publication quality as long as it is accurate;

the same goes for verbatims received from respondents. Of course, the latter can be produced more quickly and cheaply than the first.

Language

Professional translators typically work into their native language. In the case of languages of limited diffusion this might not be possible; for example, professional translators who can translate from Czech and who are native English speakers would be quite hard to find. In such cases it is crucial that the translated text is edited by a speaker of the target language. Make sure that your translator service provider uses native speakers of the target language whenever possible.

Another language-related consideration is the target audience itself. Is the Spanish version of the survey going to be distributed in Spain? South America? Mexico? Or the U.S.? If it is distributed in the U.S., is it for Florida, where most Hispanics are from Cuba, or is it for California, where most Hispanics are from Mexico? Choosing an appropriate regional variation is important not only because you want to address your audience in the language they are comfortable with, but also because some dialects can easily become politically charged. You certainly don't want to address your Taiwanese panel in Mandarin Chinese, which is spoken in the mainland China. You don't want to address Serbians in Croatian and Croats in Serbian (the artificial construct of "Serbo-Croatian" being a thing of the past now). Make sure that your translation service provider knows your target audience and is familiar with the concept of regional variations and dialects.

A word is to be said about the source language, too. If your source language is English, think international from the beginning and use "translatable" text that can be adapted for the target audience. Avoid culture-bound clichés which won't be understood in other countries – baseball metaphors, for example, will fall flat just about anywhere outside of the U.S. Do not provide your international audience with toll-free numbers that will not work in their country. Be careful with symbols and visuals, puns and slogans. Every collector of translation blunders will tell you that the Coors slogan "turn it loose" was translated into Spanish as "suffer from diarrhea." Finally, chances are that the source text is not error-free; a good translation service provider will work with you to correct errors and contradictions in the source text and will point out potential translation pitfalls.

Final review

Resist the temptation to revise the translated text without talking to your translation service provider. In many languages, grammatical and spelling rules differ dramatically from English – if you see different endings attached to a proper name, it is not because the translator does not know how to spell the name, but rather because the language in question is inflected and requires different endings for different grammatical cases. Different languages have different capitalization rules, punctuation rules, formatting requirements, etc.

It is an established practice to receive feedback from the end user in the target country. Share this feedback with your translation service provider, preferably before the translated text is finalized. Have the translation service provider review the final product before it goes to print or before it is posted online – funny things can happen to files and fonts when they change hands. Another good practice is to have the translation reviewed by an independent third party, especially if you are working with a new translation service provider. Such a review can be done by another translation service provider.

Occasionally, clients ask translation service providers for back-translation. Much discussion has been devoted to this topic, and the general consensus in the marketing research community is that re-translation of the text back to its original language to check translation accuracy is a waste of time and money. The most efficient way to assure that a translation is correct is to have the translated text edited by another translator who reads a completed translation against the source text to validate the accuracy of the final target text, and gives detailed feedback. To achieve for-publication quality, it is advisable to have the translation proofread by yet another reader, whose task is to find typographical errors and verify coherence and readability in the target language, without reference to the source text. Editing – and sometimes proofreading – are included in the per-word fee charged by a translation service provider. Back-translation, on the other hand, requires an entirely new team of translators and typically results in a text that can deviate significantly from the original, even thought the translation itself may be quite accurate. This leaves the client bewildered while no true insight as to whether the translation is good or not has been achieved. Back-translation is typically used in the pharmaceutical industry and is followed by an extensive collaborative effort of all parties involved to eliminate even the slightest chance of mistranslation. In the marketing research industry, it is best to steer clear of back-translation, unless you want to see your translation costs triple or quadruple.

Dos and don'ts

- Finalize the source text before you begin the translation process, but don't wait until the last minute for translations.
- Do not ask your bilingual staff member to do the translation.
- Remember that there is an expansion factor in many languages and that the translated text may be longer than the source text.
- Inquire about the translation service provider's area of expertise.
- Ask for references.
- Find out if the translation service provider offers a single point of contact.
- Be involved. An inquisitive translation service provider is good news; provide the information they ask for.
- Indicate the purpose of the translation.
- Specify who the target audience is.
- Discuss the conversion of currencies and units with your translation service provider.
- Provide reference materials and glossaries whenever possible.
- Do not confuse "editing" with "back-translation."
- Provide feedback to your translation service provider – positive or negative. An honest evaluation will improve your later projects.
- Remember that translation is a creative process. If it took you weeks to prepare the English version, you should not expect to have the translation back overnight.

Long-term partnership

Taking time to select a translation service provider that meets your company's needs will not only save you time and money, but will also lead to the development of a long-term, profitable partnership. The value of such a relationship cannot be overemphasized as the translation service provider will get to know your product or service intimately and will be able to cultivate a specially trained linguistic team. At the same time, your company will be able to use the linguistic feedback to streamline your own operations and communications. IQ

[1]A standard that will be useful as a guide to buying translation services will be available soon from the American Society for Testing and Materials, which is now in the final stages of producing a "Consumer-Oriented Guide to Quality Assurance in Translation and Localization." Contact the authors of this article for more information.

[2]Jiri Stejskal and Dorothee Racette: "Survey of Corporate and Freelance Members Regarding Payment Practices." *ATA Chronicle* 6 (2005), 11-17.

[3]Renato S. Beninatto and Donald A. DePalma: "Translation: Is the Price Ever Right?" June 2004. www.commonsenseadvisory.com. A summary is available at the listed site and from the authors of this article.


Sampling
That's Smart

international research

For best results, plan ahead

By Jacob Brown

The globalization of today's economy places tremendous strain on many organizations. To remain competitive they must sell their products internationally, but they often find themselves making global decisions based on little or no local data.

This demand for information from around the world has spurred the rapid growth of international research. Once the domain of only the largest and most sophisticated marketers, now companies both large and small are reaching out for global information.

This article was created to provide tips that can help a company better manage its international research and ensure better results by stressing:

• Consistency. You must strike the right balance of allowing for cultural differences in research practices while ensuring a consistent research process.

• Coordination. You have to manage the information flow out to your moderators.

• Control. No surprises are good surprises.

Managing international research

Achieving consistent results

Achieving a consistent research process with results you can trust is perhaps the greatest challenge facing anyone conducting international research. The focus group experience is different in each country and with each moderator. So, how can researchers create consistency without interfering with the unique cultural and social differences that they want to explore?

Consistency is best achieved by building a well-defined research template that clearly communicates research guidelines but still allows each moderator to adapt the process to fit local culture and individual style. Clearly articulating these ground rules will eliminate much of the ambiguity and reduce opportunities for misunderstanding. Some simple suggestions include:

• Start the research in your home country (we'll assume you're a U.S.-based company). That way all the stakeholders have a chance to attend the groups and agree on how the research "should" look before you fan out across the globe.

• Send copies of the U.S. videotapes to each foreign moderator. Remember that you may have to have the tapes converted to the appropriate video format for each country and pay to have a translator watch

Editor's note: Jacob Brown is principal at In-Depth Research, Tiburon, Calif. He can be reached at 415-789-1042 or at jacob@in-depthresearch.com.

the video with the moderator.

• Have the U.S. moderator schedule conference calls with each moderator to discuss the research process and answer questions – after they have watched the videos.

• If your budget allows it, have the U.S. moderator travel to each country. The U.S. moderator can manage the research process locally, give consistent direction to each moderator and ensure that the research doesn't get off course.

Adapting the U.S. focus group guide

In the U.S. we have become accustomed to working with a long focus group guide bursting with excruciatingly detailed questions. This type of guide will not work well in most countries outside of the U.S.

Internationally, most moderators have a more passive moderating style. They generally like a more leisurely pace and a more open group environment. As a result, you may not be able to cover as many topics as you might in the U.S. nor will you be able to drill down quite as deeply.

The process will go more smoothly and the moderators will do a better job if you:

• Use the experience you gained in the initial U.S. focus groups to cut down on the length of the guide before going overseas. Then keep additional questions in your back pocket in case you end up with extra time.

• Set up conference calls to review the guide early with the moderators – and get their feedback on the length and structure. It's important that they feel that they've participated in the creation of the final document. The quality will be better if they buy into the process.

• Have any materials to be used in the group (e.g., concept statements, positionings, product descriptions) translated by a professional translation firm, and then have the translation reviewed by the client's marketing group in each country. This two-stage process results in the highest quality and most reliable translation.

• Direct the moderator to product information (in their language) and allocate time to educate them on the product and its competitors.

The realities of international recruiting

Recruiting takes a little longer internationally, and throwing money at the recruiting process will not make it go faster or improve the quality of the respondents.

• In the U.S. we usually allot two weeks to recruit a group – give it at least three weeks in Europe or Japan. And, that's after the screener has been translated. So, it is best to think of it as four weeks from the time you send the facility the English screener.

• Make sure you get the recruiter to commit to sending you profiles of the recruit on a daily basis. These daily updates serve two functions. First, they help you stay on top of the project and second, they keep your project top-of-mind for the recruiter.

• Be careful about specifying titles in the screener. Titles vary by country – a director in the U.S. and a director in Germany are very different positions. Discuss titles carefully with your recruiter – and trust them to find the right people, regardless of what you think their title should be.

• Recruiting standards in some countries are slightly looser than in the U.S. Just as they have a more open approach to the moderating process they may also have a more flexible perspective on recruiting. So check your profiles carefully.

Tips for some major countries

Here are a few facts about conducting research in some of the major markets.

Japan

Scheduling a large number of B2B groups can be a challenge in Japan since you can only do one focus group each night, not two as we do in the U.S. Professionals have long commutes, they work late and they can't leave early or do a lunch group. However, they are very willing to come in and do groups or interviews on the weekend. So, if you need to do six groups, think of doing three on Saturday and three on Sunday. But remember, there's a lot of competition for space at facilities on the weekend, so book early.

Germany

When doing any research in Germany, be aware that the privacy laws are probably the most restrictive in the world. Your ability to get names from e-mail lists, publication lists or other databases can be severely constrained. Even using names from your own company database may be an issue.

France

Paris is famous for strikes, especially among the transportation workers. Check with the recruiter to see if there are any strikes on the horizon. If strikes have been in the news, make sure you schedule enough replacements and expect some delays. If a transportation strike is expected, you can still do the research, but have the recruiter check with each respondent about their ability to get to the facility if there is a strike. And, make sure your hotel is within walking distance of the facility.

England

There is a wide mix of educational levels among U.K. businesspeople. Leaving school early is not uncommon in England, and many successful business people have relatively little formal education. If a degree is important make sure to include it in the screener - don't assume it the way you would in the U.S. Conversely, don't require a degree in the screener unless you really feel it's important.

Scandinavia

Companies often overlook the Scandinavian countries when planning European research. But remember, they have the best technology infrastructure and the most educated and fluent English-speaking professionals in Europe.

International holidays

Europe shuts down during July and August. If you have to do groups in the summer allow extra time for recruiting and expect cancellations. The same thing happens around Christmas. Remember, on average Europeans receive over six weeks of vacation each year. Japanese workers get fewer vacation days but they have a plethora of national holidays. Make sure you have the recruiter check the calendar for local events and national holidays.

Managerial computer skills

Do not assume business managers in other countries have strong computer skills. Many managers still have secretaries and spend surprisingly little time with a PC. If strong computer skills are important for your research, make sure you ask about their skills in the screener and take it into account when building your group segmentation. | Q

Q&A: Research in Mexico

For his annual contribution to our international research issue, our West Coast ad rep/roving reporter Lane Weiss traveled to Mexico City to speak with Manuel Barberena, president of Pearson, a full-service research firm.

Lane Weiss: Tell us a bit about your company's background. How long have you been in business? What are some of the industries you specialize in researching?

Manuel Barberena: We are a 100-percent Mexican firm, which I founded in 1988. We are a founding member of the Mexican Association of Marketing Research and Public Opinion (AMAI). Our clients come from many different markets, such as fast-moving consumer goods, banking, pharma, automotive, communication, advertising, etc. Our services include quantitative, qualitative, Internet research, data mining, international research, B2B pharma and CATI.

What research methods are most commonly used in Mexico? For example, face-to-face research? Focus groups? Telephone interviewing?

In Mexico, face-to-face is still the largest way of doing research, which is completely different from the States or Europe. A lot of it is door-to-door research. The AMAI does a census every year to measure the size of the marketing research industry in our country and it is around $320 million. About 75 percent of the research conducted in Mexico is quantitative and about 25 percent is qualitative. In the qualitative area, focus groups are the most commonly used method. But in the quantitative area, almost 80 percent of the work is still done face-to-face. There is an explanation for this: telephone penetration is not as high as in other countries. It's about 55 or 60 percent, so there is a large percentage of the population without a phone. So it is not easy to reach some respondents, especially the lower classes, and many of the products that we do research for are targeted to the lower classes and they don't have phones so it is not easy to do research without good databases.

That doesn't mean that we don't do telephone research; it's growing quite fast. It is used mainly for customer satisfaction studies for clients who already have customer databases, such as airlines, banks, insurance companies, automotive firms.

Is Internet research becoming more popular and more feasible in Mexico?

The answer is no. Yes, the industry is starting to do some Internet research. But in Mexico, Internet penetration is about 10 to 15 percent,

SIS International Research

Quality ***Global Research from our Worldwide Headquarters in New York***

"One-Stop Shop for all of your International Research Needs"

t el: 212.505.6805   fax: 212.505.2742

research@sisinternational.com   www.sisinternational.com

Quality CATI & Online Interviews

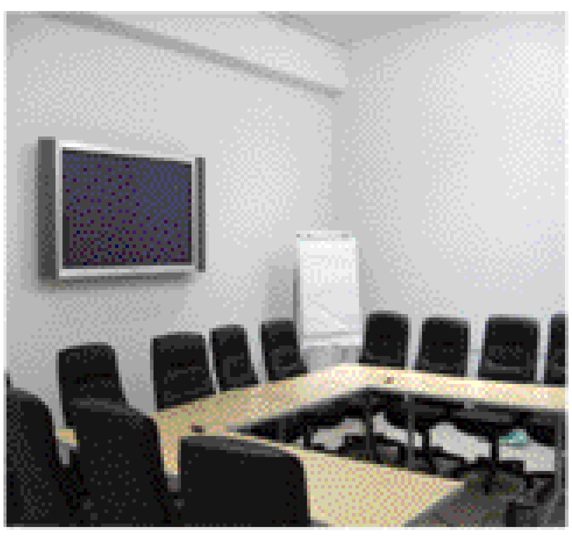
- Medical
- Pharmaceutical/ Biotech
- B2B
- Consumer
- Financial
- Industrial/ Automotive
- Telecom/IT
- C-Level Interviews
- Reporting & Analysis

7 East 20th Street, New York, NY 10003

11 East 22nd Street, New York, NY 10010

Bilingual Executive Interview Staff Native to:

- France
- Germany
- Italy
- Spain
- Latin America
- China
- Japan



New Expanded Focus Group Facilities

50 Respondent Seating/ 20 Viewer Seating

New Global Call Center

40 CATI Stations/Web Surveys

certainly not as high as in the States or in Europe. However, we have 100 million inhabitants in our country, so that means we have 15 million on the Net. So the people who are accessing the Internet today in Mexico are the early adopters, people who are young, in the medium and upper classes, who are more educated. It will take some time for Internet research to become more popular in Mexico. In the larger cities, like Mexico City, Guadalajara and Monterrey, Internet penetration is about 25 percent. It doesn't represent more than 1 percent of what we are doing in terms of the industry.

What are some of the problems facing marketing research in Mexico, in Latin America, and around the globe?

One of the main problems is response rate. A CASRO study in the U.S. shows that response rates are falling. People don't want to take the time to respond to surveys. Also, governments are passing laws that will affect our industry. For example in the U.S. and Europe there are privacy laws that affect marketing research, prohibiting marketing research firms from phone calling, for example. In the states you have CASRO and CMOR, two organizations doing a great job of protecting the rights of marketing research companies. But there are always legislators wanting to pass laws that may affect research.

Are there privacy laws in Mexico and/or Latin America that make it difficult to conduct legitimate marketing research?

In Mexico, those kinds of privacy laws don't exist yet - they will - but we don't have problems with the laws restricting research, as there are in Europe and the U.S.

However, we are seeing some problems in what we call political research. There are some states in Mexico that have laws about the publication of polling results and how to conduct the research. There are about six or seven states that are now creating laws to control research done by some institutes, mainly in the political arena.

But within the AMAI, we have heard that there are some legislators who are interested in creating laws relating to privacy of databases, especially for banks and airlines. They don't exist yet but I think they will in the near future.

How has the consolidation in the market research industry - in Latin America, the U.S. and around the world - affected the industry? Is consolidation helpful or harmful?

If you look back 10 years ago at the 10 top research agencies in our country, you would see only one foreign name, such as ACNielsen, and after that you would only see Mexican research agencies. About seven years ago, if you looked at the list of top firms, all of them are global companies, such as Nielsen, Taylor Nelson, Ipsos, Research International, Millward Brown, etc. So the answer is yes, the consolidation has affected our industry. And I wouldn't say it has been helpful or harmful - it's just a reality. It has affected local agencies like mine due to the fact that a lot of companies work at the global level and so these client companies may work with the same multinational research agency in many countries. I think there is still space for local companies to do research, because there are some techniques and some local knowledge that these global companies will never get.

Do you feel that your company's clients have reasonable expectations about what they can learn by conducting marketing research? Do they make effective use of the information they obtain from research?

It depends on the client. There are some clients who are very well-educated in terms of how to use research. They look at research as a source of good information upon which to make decisions. And there are clients who are not that educated. In general I would say that clients are educated about research as a good instrument for decision-making. But we also find that a lot of clients are very young right now. You have market research managers who are in their late 20s. They are very bright, but they have to have more experience. Some of them, and I am referring to the client side, don't the experience to make decisions. They are not dumb but they lack experience.

What things can marketing research companies do to help their clients use marketing research data more effectively?

One of the most important things for us as researchers is to become more like consultants. Historically, some clients see us or judge us as data gatherers. Sometimes, to them, all we do is just give the percentages from the quantitative study or the psychological results of a qualitative study. The step we have to make, and it is happening slowly, is to be seen as consultants. And to not only present results but also to present analysis to help the client make better decisions.

We also should do research on research, to look at new techniques, new methodologies that can help the client make better decisions. Few companies do research on research, looking for example at length of questionnaires, new techniques, whatever. But I think we need to do more research in our own arena to give clients better feedback on what we're doing to help them make better decisions.

What trends do you see in the use of marketing research in Mexico? Are certain kinds of companies or industries doing more research or less research, or doing research for the first time?

As I mentioned at the beginning, the companies that do more research in our country are, as a friend of mine says, the ones you see on TV, the multinational firms in the FMCG area, automotive, pharmaceuticals, etc. These are the companies that have historically have done research. However some Mexican companies that were not used to doing research because the Mexican economy was a closed economy for the last 50 years - now it's an open, competitive economy - are now forced to do research to learn how to make better decisions.

Such as Televisa, which is the largest television network, Bimbo, a bread products company, they didn't do research 20 years ago and now they are doing a lot of research. Mexican beer companies are also now doing a lot of research. There is also a whole new market which didn't exist 50 years ago – the political market. And it is growing very, very fast.

Does marketing research seem to be respected by Mexican businesses? Is conducting research seen as a worthwhile expenditure?

Again, it depends on the client. One of the main objectives of the Mexican research association is to be more aggressive in terms of telling our clients the importance of research. In general terms, our business is a respected one. People respect the data we gather. But I think we need to do more to reach the medium and small businesses, who don't believe in research and don't spend money on it.

What things can research companies do to help improve the reputation of marketing research among Mexican businesspeople or businesspeople in general?

I covered that in my previous answer but this would be a good time to talk about AMAI. AMAI was founded 11 years ago. We started with 10 members; now we have 39 members, representing 75 to 80 percent of the Mexican research market. This is the only organization in the country that is doing a lot of work on quality standards. The question asked about improving the reputation. In terms of the association, in order to join the association, you have to be audited in terms of quality by an external agency. We have our own ISO-type system.

Are the research departments in the client companies in Mexico growing or shrinking?

Again, it depends on the client. There are clients that have large departments and some that have one person in research. It hasn't changed in the past years. A lot of it depends on the philosophy of the company or the importance that it gives to research.

How has globalization of the world economy affected marketing research?

A lot. If you look at Mexico 50 years ago, it was a closed economy. And then in the 1990s we had NAFTA, which opened the markets to the United States and Canada. NAFTA has pros and cons but I think it has more pros than cons. One of the effects of globalization on marketing research in Mexico is the arrival of the big, multinational research groups to our country. As I mentioned earlier, the top five research companies in our country are multinational companies and that has happened because of globalization.

In Latin and South America, the size of the marketing research business is still not as high as we would like it to be. It's in the $800 to $900 million range, but just two countries, Mexico and Brazil, make up about 65 percent of that amount. The marketing research business in Argentina is growing, as it recovers from the economic problems of a few years earlier. It is growing in Chile, Colombia and Central America.

Are most of your clients based in Mexico or do you have some U.S.-based clients as well?

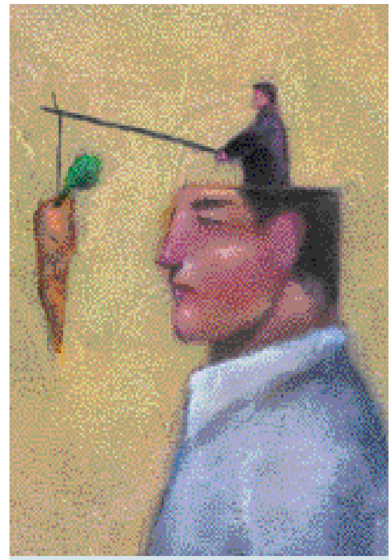
According to AMAI figures, about 85 percent of clients are based in Mexico. That doesn't mean that they are Mexican companies – it means that they are based in Mexico. You have Procter, based in Mexico; you have Colgate, based in Mexico, etc. So they are multinational companies with bases in Mexico. They have factories here, they are not just distributors. About 15 percent of the work is done with companies that are based outside our borders, mainly the United States and Europe.

Do you think more client companies will rely on a global marketing approach or will they tailor their marketing efforts - and by extension their marketing research efforts - to each country?

That's a rather philosophical question but I would say that many companies are relying on a global marketing approach and that is evidenced by the fact that they are contracting with the global research groups such as Synovate, GfK, etc. But I think that there will always be a part of the business which is local and relies on local agencies. | Q

panel research

You may get more than you pay for



By Rajan Sambandam

How often have you done surveys where open-ended questions soliciting new product/feature ideas have produced poor response? If your answer is "innumerable times," then it is time to consider smart incentives. Smart incentives are a way of motivating survey respondents to think about the questions asked and to generate the best ideas they can.

Consider what happens in a regular consumer survey. Respondents are qualified and asked to participate in a study. Often an incentive is used and while they vary in type (e.g., cash incentive, entry in a lottery, points redeemable for rewards), they all have one thing in common: The incentives are for participation in the survey, not for the quality of the responses given. The primary aim of the respondent is to complete the survey rather than provide the most thoughtful response. While this may be reasonable in some types of studies (say, measurement of customer satisfaction), it is not very fruitful when the objective is idea generation.

Innovation is the engine of growth. Yet idea generation is a difficult task for companies in all industries. Significant numbers of ideas are generated internally, but there is no denying the fact that consumers can and should participate in the process. This is where smart incentives come in. Smart incentives are a way of rewarding respondents for coming up with the best ideas and they work as follows:

Want better product ideas? Try smart incentives

Inform respondents to the survey that their ideas will be evaluated and that the best idea will receive a significant reward. Then simply allow the magic of free market competition to work as respondents compete with each other to produce the best idea.

That is all it takes. Since each respondent is providing ideas in isolation (as opposed to collaborating as in a focus group), the potential for a large and varied set of ideas to emerge is quite high. Research has shown that when a large number of reasonably well-informed people generate ideas independently, the outcome is much more positive. In other words, this method overcomes the problem of "group think." Apart from producing good ideas, the task itself is more interesting for the respondents because they are now competing to be the best.

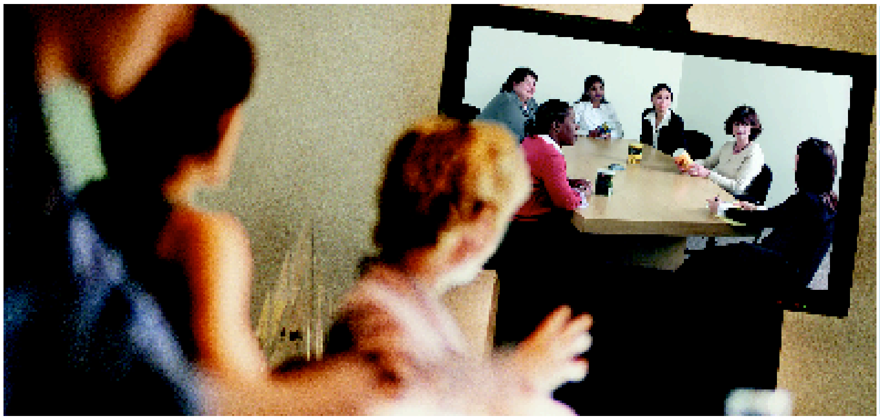
What kind of results can we expect from using smart incentives? We

Editor's note: Rajan Sambandam is vice president/research at The Response Center, a Fort Washington, Pa., research firm. He can be reached at 215-641-2251 or at rsambandam@response-center.com.

Worldwide network, moving cameras,
broadcast quality equipment...

With FocusVision **International** the difference is perfectly clear.

Only FocusVision has the proven operators, dedicated equipment, and a 24 hour technical support center to monitor projects anytime and anywhere in the world. International users also benefit from the ability to hear the live simultaneous language translation at their viewing location.



Global Researchers, view your live focus groups from around the world without travel. FocusVision is the world leader in the live transmission of qualitative research from a network of over 300 top-rated, independent focus facilities. The same facilities you probably use now.

Whether it is FocusVision VideoConferencing or VideoStreaming (or both) your projects will benefit from the increased participation that real-time, remote viewing makes possible while saving time and reducing the costs and hassles associated with travel.

WESTERN EUROPE/UK

BELGIUM
Antwerp
Synovate Belgium
DENMARK
Copenhagen
GfK Denmark A/S
ENGLAND
Birmingham
Midlands-On-View
Second City Studios
Cheshire
Aspect Viewing Facilities
Hertfordshire
Viewpoint Studios II
London
All Global Viewing
City Research Focus-City Focus Ltd
Field Facts Worldwide
London Focus
The Treehouse
Viewing Studios
Manchester (Cheadle)
Fast Forward Research
Grade Market Research
Sunbury-on-Thames
Viewpoint Studios
FRANCE
Lille
Agora/ICARE
Lyon
Marketing Espace
Synovate France
Paris
Abaka
Catherine Delannoy & Associates
Field Facts Worldwide
GfK/Sofres S.A.R.L.
La Maison Du Test
MV2 Conseil
Novatest
Passerelles
Puzzle
Realites Services
GERMANY
Berlin
Answers Test Studio GmbH
Kramer Marktforschung GmbH
Interview + Exploration
Marktforschung Berlin GmbH
Cologne
Jäll Marktforschung
Frankfurt
Field Facts Worldwide
GO Medizinische Marktforschung GmbH
Interview + Exploration Julia Otto GmbH
Intra Trans GmbH
Objective Consumer Research & Consulting GmbH
Hamburg
Answers Test Studio GmbH
GFK Data Services
Interview + Exploration Julia Otto GmbH
Schwieger Marktforschung
Munich
Kramer Marktforschung GmbH
Interview + Exploration GmbH
Research
Nuremberg
Concentra
Wiesbaden/Frankfurt
Synovate Germany
ITALY
Milan
IS International Surveys in Italy
Istituto Piepoli
Spazio Milano
Naples
ADACTA
Rome
A.M.T. Consulting
GfK-ASM
PRAGMA
SGR International
Studio Nardo
Turin
Quality Medical Field
THE NETHERLANDS
Amsterdam
Synovate The Netherlands
SCOTLAND
Taylor McKenzie Ltd.
SPAIN
Barcelona
Delta Market Research
Estudio Silvia Roca
Synovate Barcelona
Madrid
Delta Market Research
Escario & Associates
Mistra Star Research
Ilumia Investigacion
Ilumia Sala
QUID Investigacion de Mercados
Salas Castellana 23
Synovate Madrid
SWEDEN
Stockholm
IMRI-International Marketing Research Institute

EASTERN EUROPE

CZECH REPUBLIC
Prague
GfK PRAHA
POLAND
Warsaw
EEI Market Research
GfK Warsaw

MIDDLE EAST & AFRICA

MOROCCO
Casablanca
Synovate (MENA)

NORTH AMERICA

CANADA
Montreal
Contemporary Research
Toronto
Consumer Vision
Contemporary Research
Toronto Focus
Vancouver
Consumer Research

ASIA PACIFIC

AUSTRALIA
Melbourne
Viewpoint Group Rooms
Sydney
MRA Marketing & Research Assoc.
CHINA
Beijing
Acorn-Vantage Marketing & Research Co.
Guangzhou
Acorn-Vantage Marketing & Research Co.
Hong Kong
Acorn Marketing & Research Consultants
Shanghai
Acorn-Vantage Marketing & Research Co.
JAPAN
Osaka
Japan Statistics & Research Co.
Fuji Co., Ltd
Tokyo
Infoplan Inc.
JMRB Research International Japan
LYNICS - Market Focus
KOREA
Seoul
Acorn Marketing and Research Consultants
Gallup Korea
MALAYSIA
Kuala Lumpur
Acorn Marketing & Research Consultants
PHILIPPINES
Makati/Metro City
PS Consumer Research Services
SINGAPORE
Singapore
Acorn Marketing & Research Consultants
TAIWAN
Taipei
Acorn Marketing & Research Consultants
THAILAND
Bangkok
Consumer Insights Co., Ltd.

LATIN AMERICA

ARGENTINA
Buenos Aires
Infoquality
BRAZIL
Sao Paulo
Demanda
EP Escritorio de Pesquisa
LARC Pesquisa de Marketing
Target Pesquisas E Servicos de Marketing LTDA
MEXICO
Mexico City
Facts Research
Investigacion Integral de Mercados S.C.-Intermark
IDDO (Fashion)
VENEZUELA
Caracas
Escarfer-Esther Marketing Research Venezuela

Plus over 200 U.S. facilities

FocusVision™ WORLDWIDE

Worldwide Headquarters: STANFORD, CT
Regional Offices: CHICAGO • LONDON • LOS ANGELES
Telephone: 203-961-1715 opt. 6 • Email: info@focusvision.com • Website: www.focusvision.com

ran an experiment using respondents to a Web panel in which two random groups of people were asked two simple questions. The first question was about checking accounts and asked respondents to suggest one new feature or modify an existing one. The second question was similar and related to Internet service providers (as this was a Web panel all respondents were familiar with ISPs). One group was offered a standard participation incentive, which in this case was entry in a lottery for a chance to win one of several $20 gift certificates. The second group was offered the same participation incentive and was also offered an additional incentive of $200 if their idea "won." The winning idea, these respondents were told, was to be picked by another group from the same Web panel.

When the results came back it was quite clear that the smart-incentive group was responding quite differently as seen by several measures.

- The number of non-responses was higher for the participation-incentive group for both questions. That is, the smart-incentive group was more motivated to answer the questions.
- The smart-incentive group was following instructions more accurately in suggesting only one idea per question (as asked).
- When it came to the question of actual number of ideas, the smart-incentives group (across the two questions) produced 100 percent more responses than the participation-incentive group.

Looking at the ideas it was also clear that the smart-incentive group was trying harder and providing more "meat" around each idea. Frequently, they provided more elaborate descriptions of their ideas, sometimes running into paragraphs. On the other hand, the participation-incentive group's answers tended to be single phrases or single sentences.

Checking-account ideas from the participation-incentive group tended to be fee- or access-related. Examples include free checking and bill payment, ability to access account and check status online, and e-mail notification. Ideas from the smart-incentive group covered these topics, but also went beyond them and were more creative. A points/rewards system for maintaining minimum balances, linkage of bank card to grocery store card, online account balancing and various biometric recognition ideas were some that came from this group.

ISP ideas from the participation-incentive group were generally related to control (blocking pop-ups) and security (spam). Again the ideas for the smart-incentive group covered these topics and went beyond. Bundled services, phone service over Web, automatic link to best dial-up connection in area, and portable e-mail addresses were some ideas that came from this group.

Second phase

Of course, not all ideas are created equal. The process described so far is primarily useful for identifying a variety of ideas. To truly understand if one or more of these ideas will prove to be popular, a second phase of research is necessary. In this phase, ideas that are deemed practical and innovative are tested to gauge market response.

In our experiment another wave of data collection was conducted with the Web panel. In this case, respondents were asked to rate the ideas generated in the first phase. The idea that got the highest rating was declared the winner. In each product category, the winning idea was suggested by a single respondent. This is interesting because in each case a solitary respondent was able to come up with an idea that ultimately proved to be the most popular. If smart incentives were not provided or if the second phase of the research were not conducted, it would not have been possible for these ideas to emerge as winners. Of course, the client is under no obligation to just go with the winner. It is entirely possible that the client may like other popular ideas that did not win because of feasibility or other reasons. But the point is that there are many more ideas to choose from and they have all been put to a popularity test that provides a good indication of what the market thinks of them.

Needless to say, the two respondents who won were very glad to receive the $200 cash prize!

Better returns

What we see here is the power of a very nominal smart incentive to provide substantially better returns. There are different directions in which this research can be taken including additional stages for fine-tuning ideas, and addressing other objectives such as concept testing and enhancement. But the basic idea of motivating the respondent to be thoughtful remains the same. At a time when new products are failing at a high rate and companies are looking for any sort of differentiating edge, smart incentives can provide a very effective and economical boost to the idea generation and product modification processes. | Q

panel research

Managing for maximum return

How to nurture your online panel

By Beth Rounds and Heidi Dickert

Recently there has been a hot debate over the quality of online samples. Companies who promote the "number of qualified members" as the most important criterion in evaluating a research panel may fail to mention critical factors that affect panel health. Researchers who choose quantity over quality may also compromise the integrity of marketing research information, and ultimately may jeopardize the business decisions made using the data.

Undeniably, panel size is important. A large pool of respondents is essential to achieving results that yield census representation or adequate numbers of lower-incidence audiences. However, it is equally important to optimize panel member usage, and balance new and experienced members to maximize overall panel health. Passive panel management can impact data integrity and survey results in a variety of ways. For example, our research has shown that panel tenure significantly impacts a respondent's views. Therefore, a healthy panel must include an appropriate mix of new and experienced members.

When choosing an online panel, there are five key questions that need to be asked to ensure that the panel is representative and the quality of the data it provides meets the highest standards:

1. How frequently do panel members receive survey invitations?
2. What is the mix of new and experienced panel members?
3. What is the click-through rate of the panel?
4. How does the online provider handle integration of new members?
5. What is the panel turnover rate?

Optimizing online panel activity

Panelist activity level is extremely important in ensuring that respondents provide the most realistic input. We have found that using panel members too much will result in incomplete surveys, while underutilized panelists will more frequently provide biased data or engage in straight-lining or random clicking that negatively impacts survey results.

In conducting research on this topic, we've noted results that

Editor's note: Beth Rounds is senior vice president, strategic accounts at MarketTools, Inc., a Mill Valley, Calif., research firm. Heidi Dickert is the firm's vice president, client services. They can be reached at beth.rounds@markettools.com and heidi.dickert@markettools.com.

revealed "respondent conditioning" that may set in as respondents approach a total of 20 surveys, even if those surveys have been taken over a period of six months. To manage this issue, it is essential to distribute survey invites in a measured way to keep respondents productive and engaged. In fact, one survey invitation per week appears to be an optimal activity level to balance the risks of under- or over-use of panel members. This is well below the industry average of 2.5 survey invitations per week, and nowhere near the activity levels of some research panels.

Balancing new and experienced members

Balancing panel tenure is also essential to managing overall panel health. We have found that newer panelists tend to be more optimistic than their more experienced counterparts, giving higher ratings to product concepts. At the other end of the spectrum, very experienced panelists tend to be more critical of concepts. Therefore, a panel that is comprised of too many new or very experienced panelists fails to represent the broader population, and can compromise data integrity.

Research recently conducted by MarketTools, Inc. clearly supports these observations. Figure 1 shows "intent-to-buy" scores by experience level. Results between groups vary dramatically. The Top 2 box "intent-to-buy" for inexperienced panelists was 49 percent compared to 30 percent for the very experienced group. This variance was consistent throughout the results.

Minimizing turnover

A typical online consumer panel has 25 percent to 35 percent turnover each year. If you include inactive members, this could be as high as 50 percent. As demonstrated in the previous section, a panel that is tilted toward inexperienced or very experienced panelists will not represent the broader population. Therefore, keeping turnover low is important to prevent one group from dominating the panel population. It is equally important to implement programs that ensure the panel population remains appropriately balanced across experience level.

One such program guides the productive integration of new panelists. As seen above, new panelists tend to provide overly optimistic responses to survey questions. To combat this bias, we recommend creating an assimilation program to help new panelists move through the experience curve before they are exposed to live surveys. This important step enables the new panelists to become comfortable with the survey process and technology without having negative impacts on

	Balanced sample A: 25% B: 50% C: 25% n=657	A Inexperienced 1-3 surveys n=212	B Experienced 4-19 surveys n=241	C Very Experienced 20+ surveys n=204
Intent-to-Buy (Top 2 Box)	38%	49% ↑BC	37%	30% ↓A
Awareness (ever seen or heard of)	54%	62% ↑ BC	54%	45% ↓AB
Liking (Top 3 Box)	72%	74%	76%	62% ↓AB
Future Purch. Freq. (at least monthly)	47%	54%	48%	38% ↓AB

Figure 1: Survey results vary dramatically based on a respondent's level of experience. Inexperienced panelists tend to rate concepts more optimistically, while very experienced panelists rate them more conservatively. A balance of panel experience yields more representative data.

survey results.

Maximizing the "fun factor"

Lastly, it is important to make your surveys enjoyable and compelling in order to maintain engaged and active panelists. One way to do this is to develop and refine respondents' tasks to make them more realistic and interesting. The ideal is to closely mimic the real-world activity you are asking respondents to consider. Exciting new technology, such as interactive shopping exercises and media environments, is expanding what is possible with online research.

Interactive retail environments are one such exciting innovation. Mock storesettings are painful and expensive to create. Moreover, they typically fail to represent a broad geographic spectrum. Working with virtual retail environments, researchers are able to include a much more representative sample. But just as important, respondents are wowed by the experience. And intuition tells us that, because it is a familiar activity, their input is likely to be more realistic than if it was based on a less true-to-life online exercise.

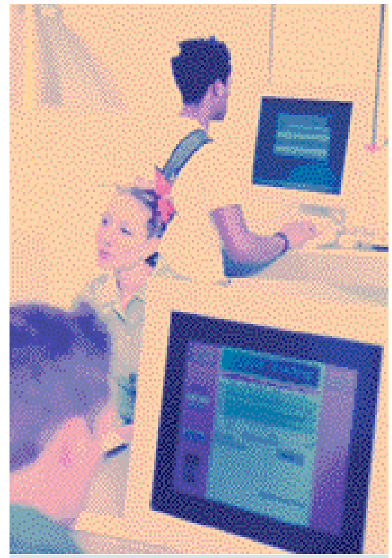
Pay close attention

As you can see, the health of your online research panel plays a critical role in the quality of the data your clients receive. Panel tenure, composition, activity level and the survey experience itself can have a significant impact on results. If you pay close attention to these critical areas, and maintain effective programs to actively manage them, you'll enjoy richer results from your panel. More importantly, you will deliver more accurate data to your clients so they can make better business decisions. | Q

panel research

Making steady progress

Online panels improving, evolving



By Gerry Philpott

There was a time, early in its development, when all forms of research conducted over the Internet were simply labeled "online research." The press often lumped together research that encompassed a well-developed methodology targeting a select sample in an online panel together with the self-select "quickie poll" found on many Web sites. As a result, critics, sometimes fairly, pointed to the lack of credibility of this very powerful form of research.

To the industry's credit, the research community has studied the various approaches to Internet research and has adopted numerous methodologies to both complement existing methods and to expand into other areas that were previously unavailable before the Internet. Marketers can now clearly see the benefits and unlimited opportunities of online research.

With over three-quarters of Americans using the Internet, and the reduced cost of database applications, online research continues to evolve in the exciting direction of panel-based research. An intelligently-recruited panel with an engaged respondent base can generate a vast amount of demographic and consumer data. Put simply, highly targeted samples yield reliable, valid and actionable data.

Unlike many CATI/CAPI-based systems where the data is collected once for a specific purpose, research conducted across a managed panel allows all of the respondents' data to be used for future purposes. If the focus of one project is to identify owners of a specific automobile, the owners of other makes can be stored for future use in follow-up research or competitive positioning. Many panel-based research suppliers take that one step further by developing a detailed and exhaustive profiling system to help identify a number of targeted sub-sets that are most often requested by their clients. Imagine the possibility of having 100 percent incidence among difficult-to-reach consumers.

Identify and reach

The majority of costs in the initial screening/profiling phase are carried by the supplier in its efforts to develop the database to adequately support its clients' needs. This in-depth profiling enables clients to identify and reach targeted groups easily and cost-effectively while maintaining the integrity of the research. The marketers begin to see tremendous cost savings for each project undertaken with the targeted groups they need to reach. The benefit to the supplier is dependable and more frequent project

Editor's note: Gerry Philpott is president/CEO of E-Poll Market Research, Encino, Calif. He can be reached at gphilpott@epoll.com.

flow from the client base.

An example of how this comes into play is a recent television program tracking project undertaken to establish a baseline of television viewership. After 17 waves of monthly television program viewership tracking, over 51,000 interviews were conducted on over 270 broadcast and cable prime-time programs. Data on awareness, viewership and overall perceptions of each program were collected. The tracking of these multiple waves accurately identified trends in each program's overall on-air performance, including under-performing programs and those that successfully built viewership. The data were replicable and consistent across all waves.

The initial primary goal was to track awareness, rating and future intent to view for networks and producers. However, as the depth and breadth of the data for each respondent surfaced, the value to advertisers, publishers and brand managers became apparent. There are very few resources to quickly access highly targeted viewers' attitudes and tastes over time. In addition, clients are now able to re-contact viewers of lower rated programs that have a niche audience base to gauge products or services they think this group would find interesting.

Once identified, the cost to access these low-incidence groups becomes much more affordable with managed online panels. The applications are limitless as marketers are increasingly fighting for a smaller share of the market and need to identify and accurately measure consumers' appetites. The same example above has been applied to pharmaceutical, automotive, CPG, physician and other types of highly specialized research.

As mentioned in the prior example, a key benefit derived from panel-based research, in addition to data capture and storage, is the ability to re-contact a portion of those same respondents. This can be integrated into the original project scope, or in some cases, new issues may arise from results of the initial study that warrant further investigation. Rather than having to sample an entirely new group, with no prior data, clients can build upon the data already collected. With this information, they can shape a subsequent study based on the insights from the initial study and continue the dialogue with their target audience.

In another example, a concept test for a new video game, a unique sub-group was identified showing strong interest. The anticipated target was teen males but the study revealed interest in the game concept among males in their 20s. A follow-up study was conducted to further clarify the demographics of the sub-group, delve deeper into open-end responses from the quantitative study, and gather additional insights on appeal and purchase intent.

As described in the TV viewing example, clients can contact respondents based on results from syndicated tracking data. They can also take advantage of data collected from their own studies as seen in the video game example or they can leverage the in-depth profile information gathered on each panel member. The key is that with panel-based research, new data points are collected with every survey.

As panel-based research services continue to evolve, there are a number opportunities of even greater value to marketers. A growing number of research suppliers can import legacy data from marketers to more easily coordinate the projects of the last five to 10 years with the upcoming development cycles that are tested using online methodologies. One of the primary reasons for the slow adoption to Internet research was the inability of many businesses to compare legacy data in a reliable and timely way to the current data. Again, the technology and software costs to administrate these functions are going down each year.

Important questions

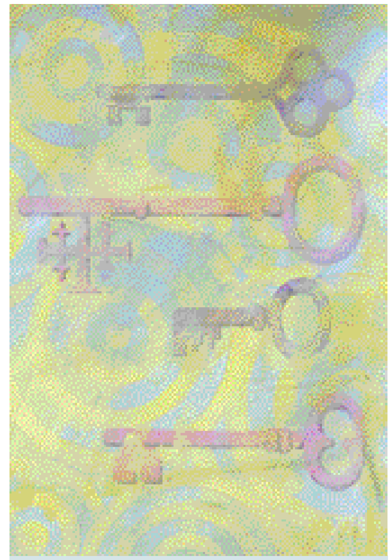
Understanding how a managed panel is established and maintained will better help marketers in their pursuit of both their targeted demographic and reliable research. The most important questions to ask any managed, panel-based research supplier are: Who is invited to participate? How are they sampled? Are they invited or do they self-select? And how often are they sampled?

For example, individuals who go to an online research Web site daily, or even multiple times during the day, may not be as representative as someone who rarely visits the site to see what types of surveys are available. Conversely, at companies who employ a managed panel where only those in the desired demographic are e-mailed an invitation, the ability to control the frequency of participation is greatly enhanced. This also reduces the frustration for those individuals who attempt to take surveys and are often terminated in the first two or three questions because they don't fit the sample requirements.

The frequency with which the respondent is invited should be determined by both the supplier and the marketer, not the respondent. In the case of self-select surveys, many of these disclose the survey topic in the invitation. Respondents interested in a particular topic are generally more likely to cooperate with a survey request when that topic is mentioned in the invitation. However, the impact of respondent interest in the topic has implications for key statistics. The survey results may be biased by the overrepresentation of those with high interest.

Lastly, marketers have a variety of exciting and innovative options to reach their desired target. Internet-based panel research offers that flexibility within a very affordable and dynamic context. Whether they build their own panel with existing marketing lists or engage a research supplier, the ability to locate and create a three-dimensional view of their targeted consumer becomes as easy as clicking a button. | Q research on research

Your survey, our needs



Panel respondents tell what gets them to participate

By Janet Westergaard

What's happening in our industry? Don't consumers care about the products and services businesses are offering/going to offer them? Don't they want to provide feedback that will make the offerings something truly special? Something worth buying? Something to get excited about? Isn't it a privilege for consumers to have the ear of business?

Guess not! Because while we researchers feel that anyone in their right mind should want to participate in market research, respondents often show reluctance. We could all argue over why this is happening, why response rates are going down. But rather than debate this amongst ourselves, we decided go to the people who should be completing the surveys. We asked consumers what makes them participate or deters them from participating in market research (online-based research in particular).

The methodology

First let's be clear on the surveys and response pool we're referring to. For the purposes of the study mentioned, the methodology was online research. A Web-based survey was put up and online research panel members were asked to respond. The panel used was an opt-in panel, so while the respondents were self-selected for the panel in general, they were not self-selected for this particular study. There was no incentive offered for participating in this particular study and the interview lasted less than five minutes.

An equal number of male and female respondents were invited (although a greater number of females actually responded), as well as a good spread of ages from 18 on up.

The response

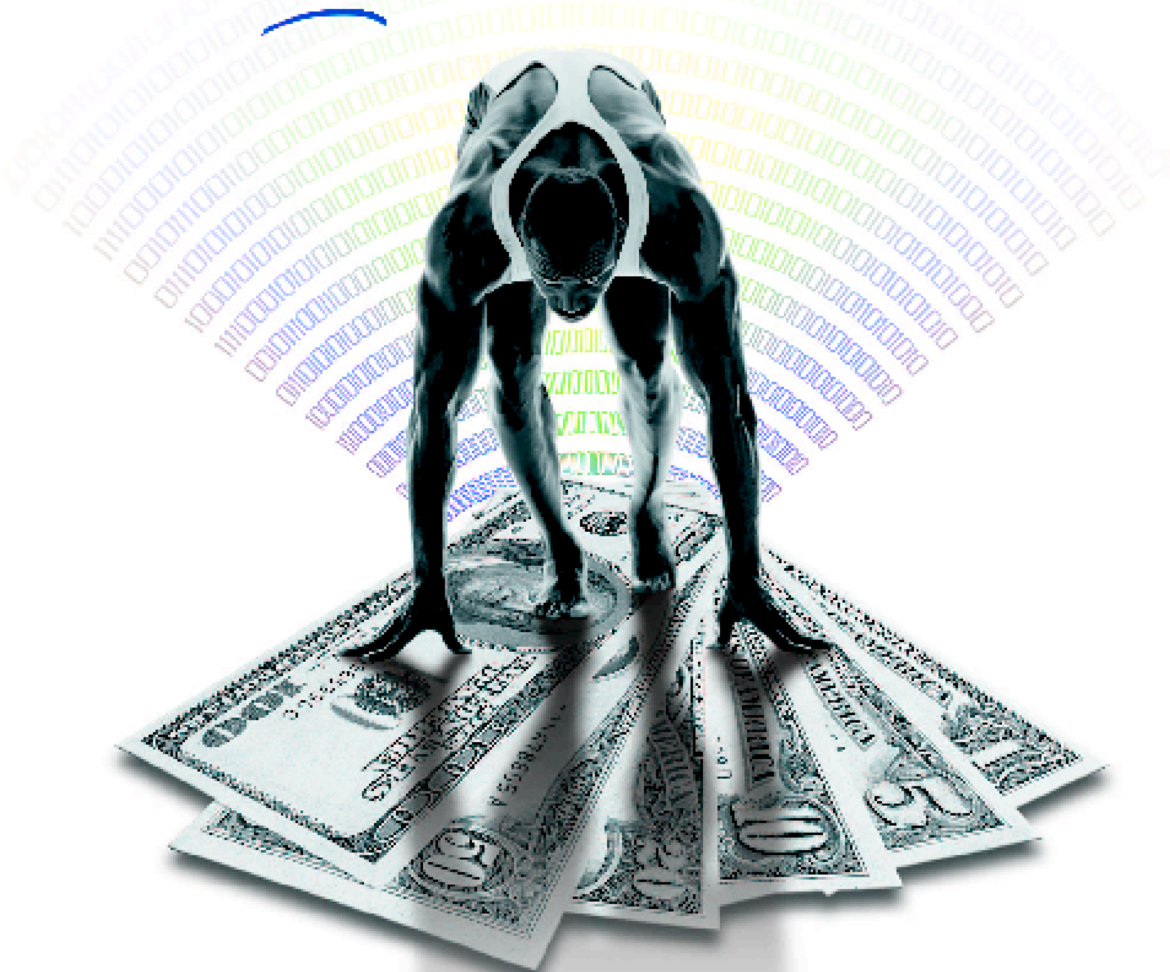
Asking the question, "What factors influence your decision to answer a survey (select all that apply)," here's what we found. The factors most likely to determine or deter respondent participation are:

- incentive offered (66 percent);
- time available when survey offer arrives (56 percent);
- topic of the survey (37 percent);
- length of interview (30 percent).

This information suggests that the factors affect males and females differently. Age has an effect as well. Males put a higher emphasis on incen-

Editor's note: Janet Westergaard is president of Esearch.com, Inc., a Rolling Hills, Calif., research firm. She can be reached at 310-265-4608 or at janet@esearch.com.

Need Better, Faster and Cheaper — all at the same time?



Despite the old platitude, it *is* possible to have all three at the same time.

BETTER
- First and only research Predictive dialer optimized by researchers for survey environments
- Global leader in research seats
- Industry-leading technical support
- Flexible — integrates with most CATI systems and telephony configurations including analog, digital and even VoIP
- Modular — options include remote/at-home interviewing, digital recording/playback, remote monitoring, etc.
- Helps improve interviewer job satisfaction

FASTER
- Productivity boosts in excess of 24%, up to a reported 320%
- Installed, trained and operating quickly
- New interviewers reach peak productivity rapidly

CHEAPER
- Quick return on investment; pays for itself in less than 6 months

TELEPHONY PRO-T-S SYSTEMS

PRO-T-S™ Telephone Systems
Leadership Through Innovation

800.336.7674

www.pro-t-s.com

Philadelphia, PA | Lincoln, NE | Research Triangle, NC | Los Angeles, CA tive (67 percent vs. 64 percent for females) while females put a higher emphasis on available time (57 percent vs. 54 percent for males). Incentive has an equal weight throughout the ages, but time available is most critical for young respondents: 72 percent of 18-30-year-olds listed available time when the survey invitation is received as a factor critical in their response. This compares with roughly 50 percent of 31+-year-olds.

Topic affects men (46 percent) more than women (31 percent), as does the length of the interview (43 percent of men vs. only 21 percent of women are influenced to respond based on the length of the interview).

When asked what ONE factor has the most influence on a respondent's decision to participate in a particular study, nearly half the respondents indicated it was the incentive offered (47 percent). The second-most influential factor was the time available when the survey arrived (27 percent). It is interesting to note that researchers can control the first factor (incentive) but not the second (time available) - although these findings may point out the need for future inquiry into what days and times are best for survey participation, since timing does have a rather strong influence.

The topic of the survey is most influential to only 12.6 percent of respondents (topic being more important for men vs. women). And finally the subject line of the e-mail invitation and the length of the interview both are most influential to roughly 5 percent of the respondents. These factors don't appear to play a major role in response.

The data were clear: If researchers want to increase response rate, they should first look at the incentive offered and then at the timing of the survey invitations.

A closer look at incentives

Having a hunch that incentive might play a big role in response, we asked questions regarding appropriate incentive levels. Not surprising, the higher the incentive, the more apt people are to respond. And overwhelmingly, respondents would prefer a guaranteed smaller incentive over the chance at winning a larger payment via a raffle drawing; 87 percent of respondents indicated this to be the case.

Only 5.2 percent of respondents would prefer the larger raffle drawing and interestingly, the majority of these folks are young (18-30-year-old) males. The older the respondent, the more strongly they feel about a guaranteed incentive.

Receiving smaller guaranteed non-cash prizes (like phone cards or other prizes) didn't interest respondents. These fared even worse than raffle drawings.

A penny for your thoughts

Today's respondents are going to need more than small change to take the time to complete a survey. The majority thought that between $2 and $3 per 10 minutes was about right. However genders don't entirely agree here: 57 percent of females felt that $1 to $3 was appropriate for each 10 minutes of interviewing while only 45 percent of the males felt this way. The majority of males indicated $4 to $5 per 10 minutes was appropriate (while less than half the females agreed). Overall feelings about incentive levels don't differ significantly by age but rather by gender.

Of course the higher the incentive, the more apt a person is to respond. Researchers can adjust these numbers to increase response rate when they're looking for hard-to-find audiences. And it's important to note that the incentive levels are for general consumers (B2B research generally requires higher incentive levels).

Do you have a minute to answer a ton of questions...

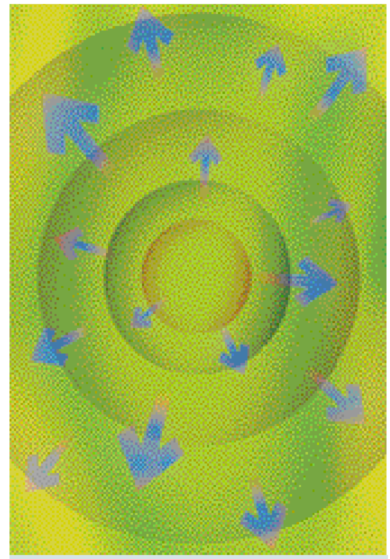
"Is there a length of interview that you would consider too long to answer?" NO! was the resounding response. Fifty-nine percent of respondents would consider any interview length as long as the incentive for participation was appropriate. Women feel more strongly here, with a full 65 percent open to any interview length. Half of the men (50.5 percent) agreed - which leaves the other half feeling that there is a limit to the time they would take to complete a survey. Of the 49.5 percent that felt there was an upper limit, half of these (25 percent of the male respondent base) felt interviews should not last more than 30 minutes.

Communicate effectively

As we continue to vie for respondents' time, it's good to know what is important to them. By listening and taking these factors into account, we can increase our research response rate and also communicate effectively to our clients about research expectations. We need not/must not take respondents for granted as it is their generosity and good nature that ultimately determines the success of our research. We rely on them and their willingness to participate and must always keep their preferences in mind. |Q

the business of research

Is MRO a friend or foe?



By Akbar S. Ahmed

Have you ever lost a bid and wondered how your competitor could make a profit at that price or how they could deliver so quickly? If so, then maybe they were using marketing research outsourcing.

Marketing research outsourcing (MRO) is an emerging trend which will change the cost structure of the U.S. research industry and enable clients to demand more rapid project delivery combined with higher quality. More importantly, MRO will enable U.S. marketing research companies to profitably deliver on these increased demands.

While MRO will change the marketing research industry, the key for your business is to leverage MRO before your competition to gain a competitive advantage.

What is MRO?

Marketing research outsourcing typically includes processes such as statistical analysis and analytics, data management, survey programming, quality assurance and support services. Although a wide variety of processes can be outsourced, the key to successful outsourcing is to focus on processes that will provide the greatest ROI.

There are three main categories of services that will provide the greatest ROI: currently subcontracted services; quality-improving services; services that shorten project delivery times.

Services that are currently subcontracted are the most obvious candidates for outsourcing, such as: coding; crosstabulations; statistical analysis and analytics; survey programming.

Like it or not, outsourcing of research services is here to stay

Quality assurance services - such as report proofing, crosstabulations proofing and survey testing - are another great outsourcing opportunity.

Services that help shorten project delivery times can use MRO to gain strategic advantage. These services are provided by internal staff and by the MRO partner. The goal is not to replace U.S. workers with overseas equivalents, but to identify the most efficient way to complete work to shorten project delivery times.

MRO vs. captive center outsourcing

It is important to make a distinction between MRO, which involves the use of an MRO partner, and captive center outsourcing, which involves a wholly owned foreign subsidiary. MRO is a team-building model that is

Editor's note: Akbar S. Ahmed is president and COO of Delixus, Inc., a San Francisco market research services outsourcing firm. He can be reached at 925-672-2623 or at akbar@delixus.com.

A brief guide to outsourcing

By Ashwin Mittal and Kedar Sohoni

Editor's note: Ashwin Mittal and Kedar Sohoni are directors of Cross-Tab Marketing Services, a Mumbai-based outsourcing firm. They can be reached at ashwin@cross-tab.com and kedar@cross-tab.com.

In the last three years there has been a growing global trend of offshore outsourcing of components of market research services, with many leading market research agencies already working with teams in offshore destination countries/regions such as India, Canada, Eastern Europe and the Philippines.

There are several conflicting views on outsourcing of MR services. While it is a substantial opportunity for the market research community to reduce costs and improve productivity it also brings with it certain difficult issues: confidentiality, job losses, choice of location, quality control etc.

More than 80 percent of the Fortune 500 companies are directly or indirectly outsourcing or looking at outsourcing large parts of their back-office processes to offshore locations. Market research-related processes have also emerged as a viable option for offshore outsourcing. Some of the components of market research that are being outsourced are: data collection using CATI (computer-aided telephone interviewing); online survey programming; data processing; data

Identified risk	Risk management measure
Confidentiality	Proper confidentiality and data security agreements need to be signed with third-party providers and senior personnel of captive centers. It is also recommended to have frequent audits to ensure compliance.
Infrastructure	It is important that the destination country and the city selected within the country have access to required infrastructure such as power, bandwidth, good connectivity through airports, hotel facilities for visits by customer's team and of course talented workers, etc.
Quality of deliverables	Careful documentation of processes is important for processes executed in any location, but in the case of offshore outsourcing, these are doubly important. Also, proper systems and protocols must be laid down for communication between teams in the client country and in the vendor country.
Domain knowledge	It is important to ensure that the senior members of the team in the offshore location have a strong domain understanding of market research and do not have just an IT or data processing background.
Cultural issues	It is necessary to understand the culture of the offshore location and the sensitivities of the people. Cultural misunderstandings can cause misgivings and can affect the quality of work.
Job losses in the client country and associated negative publicity for the agency	Good people can be retained and provided jobs in other roles in the same agency in order to fuel the growth that will result from the cost savings realized. It is important to have a proper PR initiative to explain the benefits of offshoring to the economy of the client country. (Economic studies have shown that in the long term offshoring leads to greater benefits for the economy of the client country and actually creates more jobs.)
Employee liability	This risk is not an issue if one outsources to third-party providers. If one is going the captive route then it is important to carefully study the employment laws of the destination country to ensure no legal conflicts.

designed to use the power of collaboration between the U.S. and the country hosting the outsourced services.

Captive center outsourcing, the type referred to by most media articles, is a model whereby U.S. employees are displaced by overseas workers. In this model, a U.S. firm creates a wholly owned foreign subsidiary and moves jobs overseas to the subsidiary. Often, this model is chosen by firms with limited revenue growth who are in a cost-cutting mode of operation.

The benefits of MRO

MRO can provide three main benefits to the marketing research industry: lower costs, shorter project turnaround times, higher quality. Each of the three benefits enables marketing research companies to deliver higher per-project ROI to their clients.

It is vital to understand the three types of MRO firms to prevent a situation where you accidentally fund the competition. The three types of MRO firms are: partners, competitors and hybrids.

Partners, also called pure-play MRO firms, focus on providing services to U.S. marketing research companies. Partners, such as our firm, aim to help U.S. marketing research companies gain a competitive advantage and defend against competitors and hybrids.

Competitors are full-service marketing research companies that directly compete with your company for projects. Competitors are easily identified as they target the same industry verticals as U.S. full-service firms, such as pharmaceuticals, IT, banking, etc. They also boast client lists that may match yours, such as Microsoft, Wells Fargo, GM and other client-side companies.

Hybrids provide services to U.S.

analytics; reports and presentations; and coordination of global research projects.

The bulk of the work currently being outsourced is in data processing and survey programming, but as offshore locations grow and mature, outsourcing of the other components such as data analytics and reporting will increase.

Selecting a country as an offshoring destination can be a difficult decision. Destination selection has to be made depending on the specific requirements and objectives of the research agency. However there are some criteria that are essential for any offshore destination to be viable. The country must have:

• communication infrastructure, as well as other basic capabilities, in place;

• a low-risk environment and a political climate favorable to foreign investment and participation;

• qualified and capable workers who are proficient in the language used by the outsourcer, and skilled in market research, specifically quantitative skills;

• a meaningful cost advantage.

An important decision that market research agencies need to make when moving research-related services offshore is whether to work with third-party providers or to set up captive centers. Several agencies have chosen go with third-party suppliers and several have taken the captive route. Yet another model which has been operational for quite a few years is where full-service research arms of large agencies in offshore countries have been supporting their global teams for data processing and analysis.

While the decision to go either with third-party suppliers or captive depends on the strategy of the individual agency, we have compiled some questions to guide the decision:

• Is the activity being offshored of a strategic interest to the agency? Do the agency's capabilities in this activity differentiate it from competitors?

• Does the agency have a good understanding of the operations of running a business in the destination country?

• Is it worthwhile to undergo the pains and learning process of establishing a captive center and not rely on proven expertise of third-party providers?

• Are there competent third-party providers available that can suitably address the agency's needs?

• Does the third-party provider have suitable measures in place to protect the confidentiality of client data?

While the benefits that can be had from offshore outsourcing are substantial there are also certain key operational and business risks. From our experience managing outsourcing engagements for clients, we have been able to identify certain risks and measures to mitigate them. Part of this list is outlined in the accompanying table.

Substantial benefits

If the risk factors associated with offshoring are properly addressed then substantial benefits that can accrue to the market research agency and to the MR community as a whole. We expect that offshoring will move up the value chain to encompass areas such as data mining and report writing. However, knowledge of a certain market and the associated consulting is something that cannot be easily offshored and will be a key function that will remain in the client country. | Q

marketing research companies and offer full-service marketing research. The vast majority of MRO companies are hybrids. The hybrids fund their true strategic objective of becoming a competitor by providing support services to your company. Beware! The hybrid seeks to use your money to compete against you.

Choosing an MRO partner

The image of your business is directly related to the quality of the work you deliver, which is impacted by the quality of your MRO partner. Therefore, selecting the right MRO partner is an extremely critical decision that requires an understanding of the key attributes an MRO partner should possess.

Attributes that differentiate MRO firms from the rest of the pack include: adherence to quality processes such as ISO 9001 and Six Sigma; experience; customer references; U.S.-based project management; and written training manuals.

MRO in practice

A leading U.S. marketing research company, name withheld upon request, contracted with our firm to outsource some of its statistical analysis, data management, survey programming and quality assurance work. The initial pilot included the hiring of 20 offshore staff over a 12-month period with an automatic renewal for a five-year term.

The pilot project utilized a variety of personnel including: five senior statistical analysts, 12 data management personnel, and three survey programmers.

The marketing research company needed to meet a rapid deadline for a project utilizing cluster analysis. It was critical that a factor analysis be ready by morning so that active variables could be identified and selected for use in the cluster analysis. The director of analytics was faced with the unpleasant task of asking his statisticians to work throughout the night. The other option was to take advantage of the 12-hour time gap between the U.S. and India and outsource the work.

The company chose the second option. It sent the raw dataset to Delixus, whose job was to perform a factor analysis overnight and deliver a list of active variables by morning. The time difference meant that Delixus could deliver the completed work by morning and the director's team would be refreshed and ready to evaluate the returned analysis during the day.

The future of MRO

Marketing research outsourcing is here to stay and will have a lasting impact on the industry. For the industry as a whole, MRO can lower cost structures, shorten project delivery times and improve quality. Customers will be able to demand more for less money. Companies will be able to meet those demands while maintaining or improving current profitability. | Q

Survey Monitor

continued from page 8

man - but it's a different story at home." Domestically, the woman controls the finances with the man's salary as the major source of expenditure. "The woman working is seen as a bonus," Wu says. This is borne out by the survey findings - although 74 percent say their partners earn more than they do, 75 percent vigorously disagree that whoever holds the money holds the power in a relationship.

In contrast, 58 percent of Saudi Arabian women in a long-term relationship say whoever holds the money definitely has the power, the highest in all markets surveyed. Sixty-eight percent, again the highest among all markets, say the man should pay for everything. Forty-eight percent also agree that men are always more financially savvy than women. Interestingly, Saudi Arabian women (32 percent) come in second only to Japan (38 percent) in concealing a slush fund from their partners. "Based on bank research and other information, women are the richer gender," says Ghaida Fatany, the Synovate senior research executive who conducted the study in Saudi Arabia. "Women here have always been financially covered by their fathers or husbands; therefore they do not have to spend their own money unless they really need to."

The slush fund comprises any inheritance the woman may have, core family investments and any salary if she had been working previously. Secret bank accounts are kept secret mainly to ensure financial security, says Fatany. "But some husbands, especially the more well-off ones, do not really care what their wives have in their accounts, believing that they are responsible for their wives' financial needs. What is hers is hers," Fatany says.

Japanese women (37 percent) come second after their Saudi Arabian counterparts (39 percent) in believing that getting married and/or having a family means giving up the financial freedom women now enjoy. "The truth is once a woman gets married and especially when she has children, it is very difficult to continue working," says Rika Fujiki, president of Synovate Japan. "It's very rare to have domestic helpers. In smaller cities, perhaps parents and in-laws can take care of children but in larger cities this arrangement is not too common as they may live further away."

The secret bank account, says Fujiki, contains savings derived from the daily household expenditure. Domestically, the situation mirrors that of China, where the housewife holds the bank card and control of her husband's salary. "It is her responsibility to manage the household accounts," says Fujiki. "If she wants to buy a handbag, she generates money over a few months, perhaps by saving on food or other bills. Then she tells her husband a bag she's wanted for a couple of years is now on sale. It's important to note that she is not asking for permission to buy the bag, but is in effect warning him that she's about to buy it." Having adroitly managed the domestic finances, it appears the Japanese wife is within her rights to buy the handbag whether her husband agrees or not.

American respondents consistently disagreed with the notion that men were the better financial creatures or that men should foot the bill for everything. Interestingly, although a little over half of those married or living with partners claim to take home the bigger paycheck, only 38 percent say they can pretty much afford to pay for what they want without asking for money from their partner. That, coupled with the fact that 75 percent have a joint bank account, indicates that decision-making on purchases is more of a collaborative process.

"Gender equality in household financial affairs is more the norm in the U.S.," says Tom Mularz, Synovate's global omnibus services director. "Both partners in a domestic relationship tend to contribute to and spend household income equally. Major purchases are typically mutually agreed upon. With the rise in financial independence for women, a financial partnership is most typical of the American household." For more information visit www.synovate.com.

Black women view the Web as a tool, not a toy

Black women who are Internet users tend to have a more utilitarian approach to their online activities than other female Internet users, suggests a research report based on an online survey of over 1,700 women by NiaOnline.com. "They are comfortable with using the Internet, and are more likely than their white counterparts to treat it as a no-nonsense tool for gathering information and transacting business - as opposed to a means of recreation and social interaction," says Cheryl Mayberry McKissack, president and CEO of Nia Enterprises, LLC, which owns the black women's interest Web community NiaOnline.com.

For instance, black respondents to the NiaOnline Research Monitor skewed much more heavily toward using e-mail for work-related purposes than white respondents - not surprising, since more than three times as many said they most often access the Internet from work (32 percent of black respondents versus 9 percent of whites). Black women were half as likely as white women to say that their reasons for sending e-mail were "usually personal" (39 percent versus 78 percent, respectively). Correspondingly, fewer black respondents than white respondents said they were likely to use e-mail to "share news about children, other family members, or people" they know; while more black respondents said they were likely to "communicate about work-related issues and activities."

The survey was administered during the winter of 2004-2005 to NiaOnline's opt-in, permission-based online Consumer Advisory Panel (CAP), which reaches African-American household members as well as members of other ethnic groups.

The NiaOnline Research Monitor also suggests that black women Internet users are more heavily influenced by online information about the products they buy than white women Internet users. Nearly 65 percent of African-American respondents to the survey said they frequently or almost always visit the Web site of a product when deciding to purchase it, compared with 58 percent of white respondents. Furthermore, 16 percent of African-American respondents said their favorite Web sites have a major influence on purchase decisions, versus 12 percent of white respondents. "This makes the Internet an especially effective medium for marketers hoping to reach black families," says McKissack. For more information visit www.niaenterprises.com.

This holiday season, kids want cash

According to the annual KidzEyes Holiday Wish List and Habits survey, you may be doing your shopping at an unexpected, not-so-crowded location this year: the bank. The KidzEyes Holiday Wish List and Habits survey is conducted annually by KidzEyes, a division of Chicago-based C&R Research, in cooperation with Funosophy, Inc., a Long Beach, Calif., toy industry consulting firm.

According to the survey, 41 percent of kids surveyed say money is the best kind of holiday present to get. Survey respondents, who are between the ages of 6-17, say electronics are second-best (27 percent) followed closely by toys (21 percent). Clothes are a distant fourth (11 percent). "In a departure from previous years, money unplugs electronics for the top spot on kids' 2005 wish lists. By putting money, whether cash or gift certificates, at the top of their lists, kids are really asking for spending power," says Paul Metz, vice president, C&R Research. "Without a doubt, if kids get the money they are wishing for, electronics will be one of the things they'll be spending it on. Over the past three years, electronics have been kids' most sought-after gift, with roughly 35 percent saying so."

"Electronics continue to top children's wish lists," says Nancy Zwiers, president and CEO of Funosophy. "Hand-held electronic games, video games, cell phones, and MP3 players are topping the charts with kids of all ages."

The annual KidzEyes Holiday Wish List and Habits survey unwrapped a variety of findings. Here's a look at what kids are wishing for this holiday season:

Show me the money: An overwhelming majority of kids (86 percent) say they like receiving gift certificates for the holidays. Regardless of age, gift certificates seem to be a sure bet for kids.

Give me electronic gadgetry, too: Even though money is king, kids still want their electronic gadgets. When asked which electronic devices they hope to see sparkling under the tree this season video games (62 percent), video game systems (51 percent), cell phones (47 percent) and MP3 players (44 percent) all made the list.

Girl talk: As far as the most-wanted electronic gifts, girls would rather talk or capture the moment versus play video games or be on the computer. In fact, 53 percent of girls want cell phones (versus only 41 percent of boys), a digital camera (50 percent versus only 34 percent of boys) or an MP3 player (48 percent versus only 40 percent of boys).

Fun and games: In addition to money, kids are hoping to see other presents under the tree this year. In fact, 44 percent of kids hope to receive games (board games, trading cards or hand-held electronic games). Thirty-seven percent of kids hope to get sports equipment or outdoor toys while 31 percent are hoping for arts and crafts kits/materials. Toy vehicles - such as diecast cars, trucks and radio control vehicles - were cited by 20 percent of kids.

Family fun: Of those kids who hope to get games this season, electronic hand-held games topped the list with more than three-quarters (76 percent) saying so. Family board games came in a close second at 71 percent followed by plug-and-play TV games (50 percent). Trading cards seem to have lost their sizzle with only 34 percent of kids who want games saying they would like to get trading cards.

Hot shop: Big-box general merchandise retailers are the best places to get the hot gifts of the season according to 58 percent of kids - up nearly 15 percent from last year. Other stores pale in comparison: toy stores (19 percent), electronics stores such as Best Buy, etc. (12 percent), and the Internet (7 percent).

From the mouths of boys: Boys predict toys featuring the following will be very popular this holiday season: Star Wars (50 percent), Harry Potter (49 percent), SpongeBob Square Pants (40 percent), Fantastic Four (39 percent), Spider-Man (31 percent), Charlie and the Chocolate Factory (29 percent), NASCAR (29 percent), Batman (28 percent), Yu-Gi-Oh (27 percent) and Hot Wheels (25 percent).

Girls dish: Girls predict toys featuring the following will be very popular this season: Harry Potter (45 percent), SpongeBob SquarePants (44 percent), Hillary Duff (39 percent), Bratz (37 percent), Charlie and the Chocolate Factory (34 percent), Lindsay Lohan (32 percent), Barbie (29 percent), Disney Princess (28 percent), Hello Kitty (27 percent) and Care Bears (23 percent). For more information visit www.kidzeyesomnibus.com.

U.S. Hispanics love media products

A study conducted by Media, Pa., research firm ICR found that when compared to the general population, U.S. Hispanics are more likely to purchase media and entertainment products for the home. This includes DVRs, cable products, video game systems, video games, movies and music.

U.S. Hispanics are almost twice as likely to report having a digital or personal video recorder (DVR or PVR) to record live television programs. While the reported penetration of these products is still relatively low in the general population (8 percent), 15 percent of Hispanics reported having one. Hispanics are also more likely to own a video game system (47 percent vs. 40 percent of the general population). "These findings highlight the values placed on their family and the home that is common across the diversity of Latin cultures," says Melissa Herrmann, executive vice president of ICR's multicultural research group. "It also shows the influence of the younger Hispanic generation on their overall household spending."

Hispanics are more likely than the general population to report having purchased each of the following in the 30 days preceding the survey: premium cable (62 percent to 46 percent); movies on DVD (45 percent to 39 percent); music on CD (41 percent to 33 percent); movies on VHS tape (16 percent to 12 percent).

The ICR HispanicEXCEL study was conducted by telephone from June 14 to 27, 2005, among a nationally representative sample of 1,001 U.S. Hispanic adults. The margin of error is +/- 3.10 percent. The results were compared to the general population using data from an ICR CENTRIS telephone survey of 4,000 adults conducted during the same month with a margin or error of +/- 1.55. For more information visit www.icrsurvey.com

Product placements don't prompt purchases

According to a national study by New York researcher FIND/SVP, more than half of consumers surveyed (52 percent) said they would be much more or somewhat more likely to purchase a product seen in a commercial versus one featured in a product placement (23 percent). Subliminal effects notwithstanding, the study also found less than one in four Americans believe that a product seen in a show would motivate them to purchase.

Relatively speaking, 9 percent of consumers surveyed said brand cameos during programs would actually make them much or somewhat less likely to purchase the product compared to advertising at 6 percent. FIND/SVP's study asked 1,000 consumers in August 2005 a range of questions online to determine their opinions on traditional TV advertising compared to branded entertainment or product placement. "Even with the exponential growth of spending on branded entertainment, traditional TV commercials are still having an impact on consumers," says Frank Dudley, vice president of marketing, FIND/SVP, Inc. "These findings speak to consumers' familiarity with the traditional advertisement. However, using branded entertainment within a fully-integrated marketing campaign has the potential to deliver the measurable results marketers desire."

The study revealed a disconnect with some consumers regarding the intent of all TV marketing practices. Assuming all things equal, when consumers were asked the primary objective of various marketing activities, fewer than half (43 percent) agreed completely that a scene in a show featuring someone using a product was an attempt to influence purchase. Not surprisingly, 73 percent of consumers surveyed said that the primary objective of T.V. commercials was to influence purchase.

Again, TV commercials were more acceptable across all types of programming for consumers. When asked within what type of TV show is most acceptable for them to be exposed to such marketing practices, more than half of the respondents accepted TV commercials for each genre including dramas, situation comedies, talk shows and reality shows. However, consumers surveyed were much more likely to accept product placement in scripted shows (36 percent in dramas, 47 percent in sitcoms) than reality shows (25 percent). "Innovative marketing strategies will continue to impact and influence consumer purchasing behavior," says Dudley. "Product integration in all forms of entertainment will continue to see success, but this study proves that the television commercial is not dead."

Consumers surveyed were asked to recall the well-publicized car give away on *The Oprah Winfrey Show* earlier this year. Supporting the findings cited above, only one in three (36 percent) actually recalled seeing the episode, and 44 percent of those who saw the show recalled the car she gave away – a Pontiac. Not surprising, of the males who saw the show 51 percent recalled the car and of the females who saw the show 40 percent recalled the car. For more information visit www.findsvp.com.

Pharma researchers moving to online

A study by New York research firm Medefield that compared how pharmaceutical researchers around the world are using Internet research relative to other methodologies found that use of the Internet as a chosen method of data collection for pharmaceutical market researchers continues to rise, with this growth appearing to be primarily at the expense of telephone interviewing.

Researchers have different reasons for opting for one research methodology over another, but those most often cited for choosing the Internet were speed and cost. Other important factors given were accessibility to physician samples, data accuracy and ease of use.

Market researchers responded that their use of the Internet as a method of data collection would increase if they had access to larger physician samples/panels. This was deemed an especially crucial factor to European respondents, as was proof of Internet data credibility. The survey results are based on the responses of 150 market researchers/business analysts from around the world. For more information contact Johanne Guarda at johanne.guarda@medefield.com.

Product and Service Update

continued from page 12

including support for scoring used for education and training applications and calculated fields for advanced market research, have been included in this new release. Advanced panel management – EFM 1.4 includes more robust panel management capabilities to track and access panelist demographics and other intelligence in one centralized location. CRM, HRM and BI integration support – EFM v1.4 supports integration with other applications including CRM, HRM and BI platforms through Web Services and an integration toolset to allow organizations to leverage the knowledge gathered through the survey process. SurveySolutions desktop compatibility – SurveySolutions/EFM v1.4 is compatible with SurveySolutions Desktop 7.0 for use as an offline client for survey design. For more information visit www.perseus.com.

Confirmit 10 and Confirmit CAPI now available

Norway research software company FIRM has launched Confirmit 10, an update of its survey, panel and reporting software, and Confirmit CAPI, a face-to-face interviewing platform. Highlights of Confirmit 10 and Confirmit CAPI include: survey design features developed for respondent experience optimization and accessibility compliance; end-client reporting features designed to deliver live analytics over the Web; a new Web-centric platform for CAPI and offline face-to-face interviewing; and a new platform for panel management and panelist communities to maximize panelist retention and response rates. For more information visit www.confirmit.com/10.

FocusVision offers Video Transcripts

FocusVision Worldwide, Stamford, Conn., has introduced Video Transcripts, which are transcripts in traditional text and synchronized to video. FocusVision uses certified court stenographers to deliver transcripts back to clients within 48 hours or less. Clients will receive a Video Transcript in MS Word via e-mail, online synched to video, and by CD through standard mail. Users can create transcript excerpts with video links or video clips on their PC or place them into Word, PowerPoint or e-mail files. Transcripts can be browsed for keywords and those words can be clicked on to jump to that moment in the video. By highlighting a block of text, users can get a video clip that is exportable into a PowerPoint or e-mail file. Text linked to video can be exported into reports. For more information call 203-961-1715 opt. 6 or visit www.focusvision.com.

Community Sourcebook from ESRI

ESRI, Redlands, Calif., is now offering the 2005 edition of the Community Sourcebook America CD-ROM with ArcReader. The Community Sourcebook America CD-ROM with ArcReader contains information from the 2005 printed editions of *Community Sourcebook of ZIP Code Demographics* and *Community Sourcebook of County Demographics* along with query, sort, and report software and ESRI's ArcReader map display software. The Community Sourcebook America CD-ROM with ArcReader is used by companies, agencies, and organizations that need to reference demographic data for U.S. zip codes and counties. The CD-ROM is also found in the reference sections of many public, corporate, and university libraries. This new release contains updates and projections for data such as population, age distribution, and income. Data for two newly created micropolitan statistical areas, Bonham, Texas (Fannin County) and Culpeper, Va. (Culpeper County), is also included. The dominant Community Tapestry consumer type is listed for each U.S. residential zip code, as well as demographic spending potential indexes for 20 categories such as financial services, home improvement, entertainment, home furnishings, apparel, automotive aftermarket, health insurance, pets, and pet supplies. For more information visit www.esri.com/demographicdata.

Sites provide free research resources

Pittsburgh software company CRM Survey Inc. has launched Web portals www.crmsurvey.com and www.crmfeedback.com, which let market and consumer research consultants conduct online surveys, leverage resources and conduct a variety of studies. CRM Survey Inc. offers a free desktop application platform, CRM Q+, which allows for designing survey questionnaires, the simulation of reports, and collaboration among companies and expert consultants. Descriptive statistics, data visualization, crosstabulation, group frequency analysis, time series, conjoint and TURF analysis are some of the features offered through the portals. An additional tool, CRM XNet enables members to network and communicate with each other. It is also offered to members free of charge.

Briefly

Australia-based online research firm i-Link Research Solutions has entered into a strategic alliance with Qualified Opinions Research Panel to offer the Qualified Opinions Research Panel, which will be used exclusively for market and social research purposes to ensure members are not unduly contaminated or biased by receiving direct marketing campaigns from the same source. The partnership between i-Link and Qualified Opinions will develop the membership base, which is growing at a rate of 10,000 new respondents per month. For more information visit www.i-link.com.au.

London research firm Research

Now has launched a new online panel in Australia offering access to 60,000 Australian household members. The Australian panel will be managed locally from new Research Now offices in Sydney and Brisbane. Jason Buchanan has left Research Now's London headquarters and return to his native Australia to head up the new office. For more information visit www.researchnow.co.uk.

Vancouver. B.C., research firm Vision Critical is now offering version 3.5 of its Panel+ online research platform. The new version features a redesigned user interface, new study creation and deployment functionality, expanded filtering, enhanced security and greater data import and export controls. For more information visit www.vision-critical.com.

Doane Marketing Research, St. Louis, is offering a shared-cost study pertaining to the major disease challenges faced by U.S. dairy producers caring for replacement dairy cattle. Specific diseases by three stages of growth development will be identified along with animal health products used to control each disease. For more information contact Dave Tugend at 216-491-9515, ext. 211 or visit www.doanemr.com.

Chicago-based Vista Research announced that it will provide U.S. sales and support for U.K.-based MRDC's software suite. MRDCL, a scripting language, is MRDC's flagship tabulation package. Additional products in the suite include OnTraq (for tracking studies) and Report Direct (for automated charting/reporting). The products are integrated with Excel, Access and PowerPoint. MRDC software supports the Triple S standard and is XML compatible. For more information visit www.mrdcsoftware.com, www.vista-rs.com or contact Pat Johnston at 773-868-9107.

Rochester, N.Y.-based Harris Interactive and the Harris Interactive Service Bureau (HISB) are now offering SynTrack Online to market research firms across the United States. SynTrack Online is a technical and consultative framework designed to: preserve trended data; ensure representativeness through sampling and advanced weighting techniques; accommodate mixed-mode studies; and expand revenue across new and existing accounts for both research firms and their end clients. SynTrack Online customers will also have access to Harris Interactive research and methodology consultants during the migration process and beyond. For more information visit www.hisbonline.com.

Greenfield Online, Inc., Wilton, Conn., has launched a teen panel and teen sample service. The company has built a dedicated teen panel and project delivery team and is recruiting teen respondents between the ages of 13 and 17 through multiple affiliates such as teen portals, in-person events, schools and communities and viral marketing. The panel has geographical reach within the U.S., with profile data including almost 200 variables per panelist. For more information visit www.greenfield.com.

ICC/Decision Services, Wayne, N.J., a retail customer service firm, is now offering the Retail Learning Lab, an interactive strategic model designed to change retail store associate selling behavior and increase store sales. The Lab teaches suggestive and add-on selling techniques and then reinforces them with mystery shopping, rewards and recognition. The Lab measures baseline behavior, such as suggestive selling, and then quantifies how much that baseline behavior has improved. For more information visit www.iccds.com.

continued from page 14

NetReflector, Insight in Shanghai, China, and **MI Pro AS** in Drøbak, Norway - which will operate as wholly-owned subsidiaries of GMI. GMI has also formed a new strategic alliance with **ARO Sistemas** in São Paolo, Brazil.

Schaumburg, Ill.-based **Experian Marketing Solutions** has acquired **Vente Inc.,** an Omaha, Neb., online research and marketing firm.

Alliances/strategic partnerships

Datascension Inc., Brea, Calif., has secured a formal agreement with **Harris Interactive**, Rochester, N.Y., to provide online programming support for the Harris Interactive online research division, as well as call center solutions. This relationship is valued at approximately $1.5 million per year.

Association/organization news

The Council for Marketing and Opinion Research (CMOR), Bethesda, Md., has named Donna Gillin director of operations. While Gillin was not with CMOR for the past year, she served as the organization's director of government affairs from 1994 though 2004. CMOR also introduced "Shielding the Profession" as its new tagline for an upcoming advertising campaign and debuted its redesigned Web site at www.cmor.org, which includes an interactive state resource map enabling researchers to read about legislative issues and initiatives on a state-by-state basis.

The Puget Sound Research Forum (PSRF), an association of marketing research professionals in the greater Puget Sound area of Washington state, has announced its 2005–2006 board of directors. Scott Prueter of Common Knowledge Research is the 2005–2006 PSRF president. Paul Kirch of the Olinger Group is president-elect of the PSRF Board and chairs the programs committee. Nancy Hardwick of Hardwick Research is responsible for sponsorship. Eric Larse of Kinesis heads up member development and is also a long-term board member. Richard Secker of Informa Research Services is treasurer. Ann Breese of Microsoft is responsible for member communications. Mark Rosenkranz of Pacific Market Research sits on the programs committee. Ellen Yeckel of Kinesis does PSRF special events. Mike Pritchard sits on the programs committee. He is with comScoreQ2. Marie Bennewitz, a researcher in the wireless telecommunications industry, is secretary. Janet Thorpe of Northwest Research Group is on the membership and special events committees. Manfred Bluemel of Amazon.com sits on the PSRF programs committee. Carolina Greenblat of Nordstrom Inc. is a newcomer to the PSRF board for the 2005–2006 season. Claire Booth of Ipsos is a newcomer to the PSRF board and sits on the programs committee. Will Scharf of Ipsos is past president of PSRF.

Furthering the development of the Professional Researcher Certification (PRC) credentialing program, **the Marketing Research Association** (MRA) announced the names of those researchers who will construct the first PRC examination to be administered in 2007. The PRC Exam Development Committee will be chaired by Ken Roberts of Cooper Roberts Research, San Francisco. Other committee members are: Nancy Kemmeries, vice president, Friedman Marketing, Harrison, N.Y.; Regina Lewis, director of consumer brand insight, Dunkin' Brands, Inc., Canton, Mass.; Amy Ienello, market research manager, Bose Corporation, Stow, Mass.; Stacey Hurwitz, consultant, Strategic Research Horizons, Needham, Mass.; Wasse Alemayehu, vice president of Research, GSW Worldwide, Westerville, Ohio; Melinda Denton, director of marketing research, Wells Fargo Bank, Concord, Calif.; Linda Daniel, research director, Harris

Interactive, Minneapolis; Margaret Roller, president, Roller Marketing Research, Gloucester, Va.

The MRA has joined the National Organization for Competency Assurance (NOCA), which provides guidance in setting quality standards for credentialing organizations. Through NOCA's accrediting body, National Commission for Certifying Agencies (NCCA), certification programs may apply for accreditation by NCCA if they demonstrate compliance with each accreditation standard. NCCA's Standards exceed the requirements set forth by the American Psychological Association and the U.S. Equal Employment Opportunity Commission. Only those who meet these standards may be certified. PRC is currently in the multi-year process of gaining accreditation, and it is anticipated that the PRC credential will be fully accredited by NCCA by February 2007.

Separately, the MRA announced that it has tapped InHouse Communications, a McLean, Va., public relations and advertising agency, to launch a national PR campaign extolling the benefits of marketing research in making business decisions. "The mission of MRA is to advance the practical application, use, value and understanding of the opinion and marketing research profession," says Executive Director Larry Brownell. "We're eager to generate greater understanding and visibility for the benefits of marketing research through a public relations campaign targeted at the business community."

Tim Williams has taken over the role of chairman of the **Independent Consultants Group** (ICG), an organization of independent market researchers and small consultancies based mainly in the United Kingdom. Williams plans to expand the professional services and training opportunities for ICG members. "The ICG has for years been offering professional advancement workshops and networking forums to its members, which have always been very popular. We're going to enrich our program to ensure that our members keep up-to-date with industry innovations and hear from market leaders, many of whom are members themselves," he says.

New accounts/projects

The market intelligence unit of wine and spirits maker Moët Hennessy is now offering Research Reporter to its global marketing teams. Research Reporter, developed by Australian company **Insight Marketing Systems**, is a

Web-based application designed to help corporate research teams use market intelligence within their organizations.

Africa research firm **Steadman Group** has been awarded a media research tender in Kenya to provide industry currency audience measurement for radio, television and print. The television and radio research will be conducted using the Arbitron Portable People Meter (PPM) system licensed by TNS. Steadman will conduct the initial phase of research using media diaries which will be phased out in favor of PPMs from 2006 onwards. It is anticipated that the first wave of research using PPMs will comprise a panel of 400, building up to a panel of 1,000 PPMs within four to five years.

New companies/new divisions/ relocations/ expansions

Statistical services firm **WMB & Associates** has relocated to new offices at 4310 Citrus Blvd., Suite 100, Cocoa, Fla., 32926. Phone 321-637-0777.

Boston communications firm **Pohly & Partners** has changed its name to **The Pohly Company** and, as part of a broader restructuring effort, created a communications consulting and market research group to formalize its research offerings.

Nashville research firm **20/20 Research, Inc.** has signed a lease on new office space in Miami that will house a focus group facility scheduled to open in the first quarter of 2006. Located at 8350 NW 52nd Terrace in the Doral area of Miami, the facility will house four focus group rooms, each with a client viewing room, separate telephone suite and technology and A/V connections. Anacarla Castrillo-Baquero has been hired as facility manager and will head a staff of 15-20 employees when the facility is fully operational.

Bare Associates International, a Fairfax, Va., mystery shopping firm, has opened a new corporate office in Campinas, Sao Paulo, Brazil. Ronaldo Carlos de Oliveira, director of business development, will run the new office.

Paris-based **Ipsos** has started a new company in Bangkok called Ipsos Thailand. The firm is a joint venture between Ipsos SA (owning the majority of shares) and three research partners: Jérôme Hervio, Dao Napasab and Prangnoot Suryiaporn.

Encino, Calif.-based **L.A. Focus** has changed its name to LW Research Group.

Polaris Marketing Research, Inc. has moved its headquarters to a larger space in suburban Atlanta at 1455 Lincoln Parkway, Suite 320, Atlanta, Ga., 30346.

Company earnings reports

Norway-based **FIRM** announced $7.4 million in revenue for the first half of 2005 compared to $5.7 million for the same period in 2004. EBITDA results for the year's six first months are $89,000. Revenue in Q2 2005 was $3.5 million, compared to $2.8 million in Q2 2004. EBITDA results for Q2 2005 were ($198,000).

Over the first half of 2005, Paris-based **Ipsos** reported revenue of EUR 321.8 million, an increase of 12.5 percent on the first half of 2004. Currency effects remained negative, although to a lesser extent than in the last three years, at 1.4 percent. Organic growth of 7.8 percent was ahead of the market average. Operating margin was up 18.0 percent to EUR 24.8 million, profit before tax was up 31.4 percent to EUR 20.5 million and profit (group share) was up 19.6 percent to EUR 10.4 million.

At **Harris Interactive**, Rochester, N.Y., revenue for the fourth quarter of FY2005 was $54.2 million, up 37 percent when compared with $39.6 million of revenue from the same period a year ago. U.S. revenue was $42.3 million, up 30 percent from $32.5 million for the FY2005 fourth quarter. European revenue was $11.9 million, up 67 percent from the $7.1 million of revenue reported for the same period a year ago. Harris Interactive Service Bureau (HISB) revenue was $1.9 million, down nearly 30 percent from the $2.7 million of HISB revenue reported a year ago. Favorable foreign currency exchange rates added $0.2 million to revenue for the fourth quarter of FY2005.

Global Internet revenue for the fourth quarter of FY2005 was $30.5 million, up 14 percent from last year's fourth quarter Internet revenue of $26.7 million. For the fourth quarter of FY2005, U.S. Internet revenue was $27.1 million, up 9 percent when compared to the $24.9 million of fourth quarter of FY2004. European Internet revenue for the fourth quarter FY2005 was $3.4 million, up 90 percent from $1.8 million in fourth quarter FY2004. Internet revenue comprised 56 percent of revenue, 64 percent of the U.S. revenue and 29 percent of the European revenue for the fourth quarter of FY2005.

Fourth quarter FY2005 operating income, including one-time items of $1.0 million due to severance payments, was $2.9 million, down 52 percent when compared to operating income of $6.0 million for the same period last year. One-time items are defined as restructuring and other charges for severance costs, asset write-offs and impairments.

Income from continuing operations for the quarter was $0.7 million, or $0.01 per diluted share including after-tax severance costs of $0.6 million, or $0.01 per diluted share. Income from continuing operations for the fourth quarter FY2004 was $24.9 million, or $0.43 per diluted share, which includes an income tax benefit of $20.7 million, or $0.36 per diluted share due to reversal of a valuation allowance against deferred tax assets.

Net income for the quarter, including $0.5 million in income from discontinued operations, was $1.2 million, or $0.02 per diluted share, compared with net income of $24.8 million, or $0.43 per diluted share for the fourth quarter of fiscal 2004.

Revenue for the fiscal year ended June 30, 2005 was $197.0 million, up 42 percent from the $138.5 million of revenue for fiscal year 2004. U.S. revenue was $149.9 million, up 34 percent from the $112.0 million of U.S. revenue a year ago. European revenue was $46.5 million, up 76 percent compared with $26.5 million of revenue in fiscal 2004. HISB revenue for the year was $9.0 million dollars, a 10 percent decrease from the prior year's level of $10.0 million. Favorable foreign currency exchange rates added $2.7 million to revenue for fiscal year 2005.

Global Internet revenue for fiscal year 2005 was $109.3 million, up 27 percent from last year's $86.1 million. For the year, U.S. Internet revenue was $97.7 million, up 19 percent when compared to the $81.9 million in fiscal 2004. Fiscal 2005 European Internet revenue was $11.6 million, up 178 percent from $4.2 million in fiscal 2004. Internet revenue comprised approximately 56 percent of revenue, 65 percent of U.S. revenue and 25 percent of European revenue for the year.

Operating income for fiscal year 2005, including one-time items of $2.8 million, was $9.0 million, down 32 percent when compared to operating income of $13.3 million for the same period last year.

Fiscal 2005 income from continuing operations was $4.5 million in, or $0.07 per diluted share, including after-tax one-time items of $1.7 million, or $0.03 per diluted share. Income from continuing operations for fiscal 2004 was $29.8 million, or $0.52 per fully diluted share, and included an income tax benefit of $20.7 million, or $0.36 per diluted share, principally due to reversal of a valuation allowance against deferred tax assets.

Net income for the fiscal year, including a $3.0 million mostly non-cash loss from discontinued operations, was $1.6 million or $0.03 per diluted share, compared with net income of $29.9 million, or $0.52 per diluted share for fiscal 2004.

Names of Note

continued from page 10

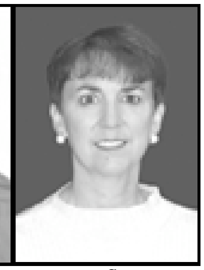
appointments within the new group: **Michael Rosenberg** has been promoted to president, specialty healthcare group, and has overall responsibility for the group; **Jonathan Kay** has been named president, business solutions and sales; **Jeremy Brody** has been named senior vice president, panel activities; and **Adam Warner** has been named account manager. Separately, **Paul Barnes** has been promoted to president, major pharma group; **Wes Michael** has been promoted to executive vice president; **Linda Rigney-Trinidad** and **Ron Cosgrove** have been promoted to senior vice president; **Ian McKinnon** has been promoted to senior vice president, decision support; **Jeff Zornitzky** has been named senior vice president for sales performance optimization; **Aaron Morel** and **Martin Holzman** have been promoted to vice president; **Suzanne Berg** has been named vice president for brand performance optimization initiatives; **Steve Kretschmer** has been named senior account executive; **Pam Rubio Soletto** has been promoted to account manager; **Sen Deng** has joined the decision support team as a senior methodologist; and **Mike Kaczmarski** has been named chief financial officer.

Arbitron Inc., New York, has promoted **Kathleen Ross** to the newly-created position of chief administrative officer. **Robert H. Patchen** has been appointed to the newly-created position of chief research officer. The firm has also promoted two members of its Columbia, Md.-based Portable People Meter research team, naming **Beth Webb** director and **Dan Ames** director, international research.

Stamford, Conn., research firm *InsightExpress* has promoted **Mark Sullivan** to custom panel manager and named **Marc Ferriner** online media planner/buyer within the respondent delivery group. **Patricia DePietto** has been named group director, consumer packaged goods. **Dana Taylor** has joined the company's Seattle office as account manager, advertising. And **Keith Busch** has been promoted to account manager, emerging markets in the company's Stamford office.

Bellomy Research, Inc., Winston-Salem, N.C., has promoted **Jeff**


Goldman


Lefler

Goldman and **Karen Lefler** to vice president - client service and named **Aaron Ballance** customer


Ballance


Hendrix

relations specialist. In addition **Thomas Hendrix** has joined the company as research manager.

M/A/R/C Research, Irving, Texas, has named **Will Leskin** vice president, qualitative services. In addition, **Nancy Miller** and **Mary Loveland** have joined as account director.

In September, the board of directors of Rochester, N.Y.-based *Harris Interactive* unanimously elected **Gregory T. Novak** as the company's president and chief executive

officer and also elected him to the board of directors.

Prerana Davé has joined *FocusVision Worldwide* as an A/P manager in the Stamford, Conn., office.

Global Market Insite, Inc., Seattle, has named **Richard Scionti** vice president of the newly formed global enterprise solutions group.

Heather Prabish has joined the Chicago office of research software firm *E-Tabs* as business development manager.

Caryn Portnoy has joined the *NPD Group*, Port Washington, N.Y., as senior public relations manager in the food service/food and beverage, housewares, and automotive divisions.

MORPACE International, Inc., a Farmington Hills, Mich., research firm, has named **William J. Herald** research director for the health care group.

Herald

Jersey City, N.J., research firm *Cross-Tab Marketing Services* has completed an agreement with **Simon Chadwick** under which he will serve as a strategy advisor to the company. Chadwick is a principal of consulting firm Cambiar LLC.

Denver research company *iModerate* has named **Gary Zucker** vice president of sales.

Mindwave Research, Austin, Texas, has named **Bill Mathis** director of qualitative research.

2005

Research Panels

Directory >>>

Welcome to the first annual directory of research panels. This directory was compiled by contacting firms we identified as having research panel services. The directory contains 104 firms that have over 250 panels available. The company listings, which begin on the next page, list the company's contact details as well as the panels they have available. For most firms we have included the size of the panel as well as how panel members are surveyed (mail, telephone, Web). We also identified those firms that offer client-specific proprietary panel management. To further help you find a panel that meets your needs, we have included an industry and audience cross-index section. This section, which begins on page 106, lists the name of the panel, the company providing it, and the page number where the contact information can be found. An online version of this directory will be available in early 2006.

Do you know of a panel that is not listed? Please e-mail Steve Quirk (steve@quirks.com) to add the panel to our database.

Codes

To search for panels by industry or audience, please use the cross-index section on page 106.

Size: Number of members in the panel
Type: How members are surveyed (mail, telephone, online)

ACNielsen - The Americas
150 N. Martingale Rd.
Schaumburg, IL 60173
Ph. 847-605-5000
www.acnielsen.com
Panel Titles:
Fresh Food Consumer Panel
Size: 15,000
Homescan
Size: 126,000
Homescan Panel Views Survey
Size: 61,500
Intended Users
Size: 61,500
The African-American Consumer

Affordable Samples, Inc.
185 Sound Beach Ave.
Old Greenwich, CT 06870
Ph. 800-784-8016 or 203-637-8563
sales@affordablesamples.com
www.affordablesamples.com
Panel Titles:
Affordable Samples Online Business Panel
Size: 900,000 Type: Online
Affordable Samples Online Consumer Panel
Size: 1,000,000 Type: Online

The OTHER, better value sampling company in Connecticut, founded in 1991, providing representative online consumer (1.6M) and business (700K) panel samples. Many predefined selectors and fast pre-screening for almost any low-incidence category. Sample-only service or sample plus programming/hosting. Fast fielding, responsive service and great prices. Sampling expertise and advice. Hundreds of smart research clients.
(See advertisement on p. 26)

all global
5-25 Scrutton St., Unit E
Zetland House
London EC2A 4HJ
United Kingdom
Ph. 44-20-7749-1434
info@allgloballtd.com
www.allgloballtd.com
Eva Caparra, Director
Panel Titles:
All Global Online
Size: 50,000 Type: Online

Amplitude Research, Inc.
One Boca Place
2255 Glades Rd., Suite 324A
Boca Raton, FL 33431
Ph. 877-225-7950
sales@amplituderesearch.net
www.amplituderesearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Amplitude Research Technology Panel
Size: 3,500 Type: Online

AMR Interactive
Level 14, 235-243 Jones Street
Ultimo
Sydney, NSW 2007
Australia
Ph. 61-2-9020-6700
insights@amrineractive.com
www.amrinteractive.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
AMR Interactive Chronic Illness Panel
Size: 20,000 Type: Online
AMR Interactive Consumer Panel
Size: 300,000 Type: Online
AMR Interactive Small/Medium Business Panel
Size: 25,000 Type: Online

ARCS® IVR Systems
565 Virginia Dr.
Fort Washington, PA 19034-2706
Ph. 540-576-1419
bmueller@m-s-g.com
www.arcsivr.com
Bruce Mueller
Proprietary Panel Mgmt.: Yes

Since 1991, companies have used ARCS® technology to automate recruiting, scheduling and collection of data from proprietary panelists for central location and home-use tests, sensory evaluations and focus groups. Highly customizable, ARCS IVR systems feature robust SQL databases, automatic updating of panelist information via Web or IVR, and built-in sample selection, questionnaire development and query tools plus many standard reports.

Berenhaus Research Solutions, LLC
37 Jamie Court, 2nd floor
Bloomfield, NJ 07003
Ph. 973-566-0095 or 973-495-9411
iberenhaus@comcast.net
www.berenhaus.com
Ira Berenhaus, President
Panel Titles:
Berenhaus B2B Panels
Type: Mail, Online
Berenhaus Consumer Panels
Type: Mail, Online

Bloomerce Access Panels Europe
P.O. Box 245
3000 AE Rotterdam
Netherlands
Ph. 31-10-400-09-09
info@bloomerce.com
www.bloomerce.com

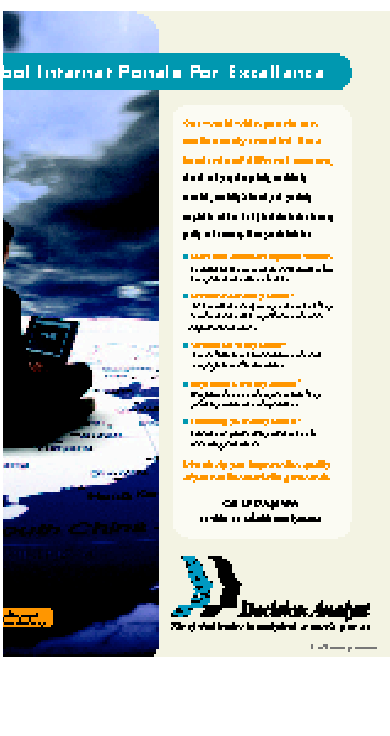
BRAND INSTITUTE, inc.
200 S.E. 1st St., 12th Floor
Miami, FL 33131
Ph. 305-374-2500
www.brandinst.com
Panel Titles:
Brand Institute Panel

BuzzBack
6 E. 39th St., 8th Floor
New York, NY 10016
Ph. 646-519-8010
info@buzzback.com
www.buzzback.com
Panel Titles:
Buzz Back Panel
Size: 300,000 Type: Online

C&R Research Services, Inc.
Creative & Response Research Services, Inc.
500 N. Michigan Ave., Suite 1200
Chicago, IL 60611
Ph. 312-828-9200
info@crresearch.com
www.crresearch.com
Megan Burdick, Dir.New Business Dev.
Panel Titles:
KidzEyes.com
Size: 14,500 Type: Online
LatinoEyes.com
Size: 5,000 Type: Online
Momnibus
Size: 12,000 Type: Online
TeensEyes.com
Size: 7,000 Type: Online

Caduceus Marketing Research
111 Howard Blvd., Suite 100
Mt. Arlington, NJ 07856-1315
Ph. 973-770-4000
tomsimpson@cmr-usa.com
www.cmr-usa.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Dental Consulting Network
Size: 3,000 Type: Mail, Online
Nurses Consulting Network
Size: 3,500 Type: Mail, Online
Pharmacists Consulting Network
Size: 2,100 Type: Mail, Online
Physicians Consulting Network
Size: 37,000 Type: Mail, Online
Veterinary Consulting Network
Size: 3,000 Type: Mail, Online

ChildResearch.com
175 N. Main St.
Branford, CT 06405
Ph. 203-483-4301
info@childresearch.com
www.childresearch.com
Panel Titles:
Childresearch.com Panel


Internet Panels For Excellence
Decision Analyst

Codes

To search for panels by industry or audience, please use the cross-index section on page 106.

Size: Number of members in the panel
Type: How members are surveyed (mail, telephone, online)

Ciao GmbH
Leopoldstrasse 236
80807 Munich
Germany
Ph. 49-89-2555-1600
germany@ciao-group.com
www.consumer-access.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Ciao's Car Panel
Ciao's European Access Panel
Ciao's Health Panel

Circle 1 Network
131 W. Seeboth St.
Milwaukee, WI 53204
Ph. 414-271-5437
sally.schmidt@circle1newtork.com
www.kidscom.com
Sally Schmidt, Research Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
Kidscom Club
Size: 170,000 Type: Online

Clarion Research
1776 Broadway, Suite 1000
New York, NY 10019-2002
Ph. 212-664-1100
diane.traiger@clarionresearch.com
www.clarionresearch.com
Diane Traiger, President
Panel Titles:
Clarion Research Web Panel
Type: Online
Investor Relations Benchmark
Type: Online

ComScore SurveySite
90 Sheppard Ave. E., Suite 100
Toronto, ON M2N 3A1
Canada
Ph. 416-642-1002
sales@surveysite.com
www.surveysite.com
Panel Titles:
Opinion Square

Consumer Contact
1220 Sheppard Ave. E., #100
Toronto, ON M2K 2S5
Canada
Ph. 800-461-3924 or 416-493-6111
info@consumercontact.com
www.consumercontact.com
Carrie Moyer, Director of Online Research
Proprietary Panel Mgmt.: Yes
Panel Titles:
Canadian Consumer Panel
Size: 80,000 Type: Online
US Financial Decision Makers
Size: 21,000 Type: Online

Consumer Link
Insight Counts
1718 Lake Grasslands West
Gallatin, TN 37066
Ph. 615-822-5260
darlahall@conslink.com
www.insightcounts.com
Darla Hall
Proprietary Panel Mgmt.: Yes
Panel Titles:
Consumer Link Concept Development
Size: 10,000 Type: Online
Consumer Link Consumer Research
Size: 10,000 Type: Telephone, Online
Consumer Link Customer Satisfaction
Size: 10,000 Type: Telephone, Online
Consumer Link Employee Satisfaction
Type: Telephone, Online
Consumer Link Ethnographic Research
Size: 10,000 Type: Online
Consumer Link Focus Groups
Size: 10,000
Consumer Link Home Use Tests
Size: 10,000 Type: Telephone, Online
Consumer Link Mystery Shopping
Size: 7,000 Type: Telephone, Online
Consumer Link Product Testing Research
Type: Telephone, Online

Consumer Research Centre Ltd.
1398 West 7th Avenue
Vancouver, BC V6H 3W5
Canada
Ph. 604-714-5900 or 866-455-9311
info@consumerresearch.ca
www.consumerresearch.ca
Jessica Gibson
Panel Titles:
The Consumer Research Panel
Type: Online

Consumer Research Centre Ltd.
425 Bloor Street East, Suite 550
Toronto, ON M4W 3R4
Canada
Ph. 416-966-5900
info@consumerresearch.ca
www.consumerresearch.ca
Jessica Gibson, Director Business Development
Proprietary Panel Mgmt.: Yes
Panel Titles:
Consumer Research Panel
Size: 80,000 Type: Online
Consumer Research RX
Size: 35,000 Type: Online

Creative Marketing & Research
Broomvale Four C, Broomvale Business Centre
Bramford Road, Little Blakenham
Ipswich, UK IP8 4JU
United Kingdom
Ph. 1473-832-211
info@creativemarketing.co.uk
www.creativemarketing.co.uk
Panel Titles:
Anaesthetists & Critical Care Nurses Panel
Type: Online
Asthma Patients Panel
Type: Online
Diabetes Nurse Educators/CDE's Panel
Type: Online
Diabetes Patients Panel
Type: Online
Pharmacists Panel
Type: Online
Specialist Respiratory Nurses Panel
Type: Online

Cross-Tab Marketing Services Pvt. Ltd.
171B, Mittal Tower, 210 Nariman Point
Mumbai 400021
India
Ph. 91-22-22022043
sales@cross-tab.com
www.cross-tab.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Cross-Tab Indian Consumer Panel
Size: 60,000 Type: Online
Cross-Tab Panel of IT Professionals
Size: 90,000 Type: Online

Cross-Tab provides paneling and offshore outsourcing services to global marketing and market research organizations. Cross-Tab has an Online Consumer Panel and an Online Software Developer Panel in India. Cross-Tab is also in the process of building out its proprietary panel across various Asia-Pacific regions.
(See advertisement on p. 54)

Datatelligence Online
(A Div. of Cunningham Research Group)
3 Signal Ave.
Ormond Beach, FL 32174
Ph. 800-831-1718 ext. 269
anaescudero@cunninghamresearch.com
www.datatelligence.com
Ana Escudero, Panel Department Manager
Panel Titles:
Dataintelligence ONLINE
Size: 250,000 Type: Online

Datatelligence ONLINE, a division of Cunningham Research Group, specializes in the development and management of online panels. Our panels consist of more than 250,000 pre-qualified consumers from different backgrounds and ethnicities who represent the general population and participate in a variety of research studies.

Decision Analyst, Inc.
604 Avenue H East
Arlington, TX 76011-3100
Ph. 817-640-6166 or 800-262-5974
jthomas@decisionanalyst.com
www.decisionanalyst.com
Jerry W. Thomas, President/CEO
Proprietary Panel Mgmt.: Yes
Panel Titles:
American Consumer Opinion ®
  Size: 5,000,000 Type: Online
Contractor Advisory Board
  Type: Online
Executive Advisory Board
  Size: 140,000 Type: Online
Medical Advisory Board
  Size: 35,000 Type: Online
Physician's Advisory Council
  Size: 28,000 Type: Online
Technology Advisory Board
  Size: 115,000 Type: Online

Decision Analyst started building its Internet research capabilities and systems in 1996. Since then we have become a global leader in Internet-based research systems by developing secure, scientifically valid, technologically advance, and carefully integrated software and systems. We have conducted hundreds of online surveys using our proprietary research systems and our worldwide online panels.
(See advertisement on p. 87)

Decision Insight, Inc.
106 W. 14th St., Suite 2500
Kansas City, MO 64105
Ph. 816-221-0445
info@decisioninsight.com
www.decisioninsight.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Teen Insight™
  Size: 5,000,000+

TeenInsight™ is the largest panel of U.S. teenagers available, providing access to 5+ million high school students. It's fully representative of the Census' teen demographics. Sample profile points include lifestyle, activity interests, sports interests, career interests, age, gender, and ethnicity. Use TeenInsight's Omnibus for issues requiring quick feedback such as concept testing, attitude abd usage, ad testing, and trend analysis.
(See advertisement on this page)

Digital Research, Inc.
201 Lafayette Center
Kennebunk, ME 04043-1853
Ph. 207-985-7660
bob.domine@digitalresearch.com
www.digitalresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
DRI Consumer Panel
  Size: 197,234 Type: Online

DiscoverWhy.com
135 South Rd.
Bedford, MA 01730
sales@discoverwhy.com
www.discoverwhy.com
Panel Titles:
DiscoverWhy.com Panel
  Type: Online

DMS Research
Digital Marketing Services, Inc. (DMS)
1305 S. State Hwy. 121, Suite 290
Lewisville, TX 75067
Ph. 800-409-6262
DMSemail@aol.com
www.dmsdallas.com
Panel Titles:
Opinion Place
  Type: Online
SurveySpree
  Size: 1,500,000 Type: Online

DMS produces two distinct online sample products. Our premier offering, Opinion Place, uses a unique river methodology to supply our online respondent portal with a truly fresh, scientifically-managed sampling frame. This RDD-like recruitment technique results in unparalleled purity for your most critical projects. More recently, we've developed a robust online panel (SurveySpree) using conventional recruitment methods with precision targeting capabilities.
(See advertisement on p. 63)

Codes

To search for panels by industry or audience, please use the cross-index section on page 106.

Size: Number of members in the panel
Type: How members are surveyed (mail, telephone, online)

DoctorDirectory.com, Inc.
One Page Avenue, Suite 280
Asheville, NC 28801
Ph. 828-255-0012 or 888-796-4491
research@doctordirectory.com
http://clients.doctordirectory.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
DoctorDirectory.com Consumer Panel
Size: 800,000 Type: Online
DoctorDirectory.com Physician Panel
Size: 545,000 Type: Mail, Online

DrugVoice LLC
5602 Richmond Ave.
Dallas, TX 75206
Ph. 214-803-6036
melissa.krauth@drugvoice.com
www.drugvoice.com/services
Proprietary Panel Mgmt.: Yes
Panel Titles:
PatientVoice Panel
Type: Online

E-Poll
16133 Ventura Blvd., Suite 905
Encino, CA 91436
Ph. 818-995-4960
mwaxman@epoll.com
www.epoll.com
Michele Waxman
Proprietary Panel Mgmt.: Yes
Panel Titles:
E-Poll Consumer Panel
Size: 250,000 Type: Online

e-research-global.com
1527 Kalaniwai Place
Honolulu, HI 96821
Ph. 808-377-9746
drjohn@e-research-global.com
www.e-research-global.com
Panel Titles:
e-Research-Global.com Panel
Type: Mail, Online

e-Rewards Inc./ERI Research
8401 N. Central Expwy., Suite 900, LB38
Dallas, TX 75225
Ph. 214-743-5429
info@e-rewards.com
www.e-rewards.com/researchers
Kurt Knapton, Executive Vice President
Proprietary Panel Mgmt.: Yes
Panel Titles:
e-Rewards B2B Panel
Size: 1,000,000 Type: Online
e-Rewards Consumer Panel
Size: 2,000,000 Type: Online

e-Rewards Research, Inc. (ERI), the online sample quality leader, provides the highest level of service through its 2,000,000+ member Consumer Panel and 1,000,000+ member Business Panel, while maintaining over 300 profiling segments. ERI response rates are among the highest in the industry, 15-35% depending on sample target. The "by invitation only" enrollment methodology reduces self-selection bias and blocks "professional survey takers."
(See advertisement Insert)

Esearch.com, Inc.
32 S. Middleridge Lane
Rolling Hills, CA 90274
Ph. 310-265-4608
esearch@esearch.com
www.esearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Esearch Business/IT Panel
Size: 25,000 Type: Online
Esearch Children/Teens Panel
Size: 150,000 Type: Online
Esearch Consumer Panel (U.S.)
Size: 800,000 Type: Online

Since 1995, Esearch.com Inc. has provided online sample for Internet research. Our extensive consumer panel is profiled to enable targeting of early adopters, people with medical conditions, home owners, pet owners, sports (and other) enthusiasts and much, much more. (See advertisement on this page)

FGI Research
400 Meadowmont Village Circle, Suite 431
Chapel Hill, NC 27517
Ph. 919-929-7759
info@fgiresearch.com
www.fgiresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Beckett Sports Collector Panel
Type: Online
SmartPanel for Businesses
Type: Online
SmartPanel for Growing Families
Type: Online
SmartPanel of Consumers
Type: Online
SmartPanel of Hispanics
Type: Online

Gang & Gang, Inc.
Resonance Research
16 Front St.
Salem, MA 01970
Ph. 978-740-4474
sgang@gang.net
www.gang.net
Steve Gang, President/CEO
Panel Titles:
Resonance Survey Panel

Codes

To search for panels by industry or audience, please use the cross-index section on page 106.

Size: Number of members in the panel
Type: How members are surveyed (mail, telephone, online)

GENESYS Sampling Systems
565 Virginia Dr.
Fort Washington, PA 19034-2706
Ph. 800-336-7674 or 215-653-7100
info@m-s-g.com
www.genesys-sampling.com
Gregg Kennedy, Vice President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Your2Cents Ailments & Care Givers
Size: 475,000+ Type: Online
Your2Cents Business-2-Business
Size: 2,500,000 Type: Online
Your2Cents Cellphone Survey Panel
Size: 165,000+
Your2Cents IT Prof./Tech. Users/Decision Makers
Size: 25,000+ Type: Online
Your2Cents Online Opinion Panel
Size: 3,750,000 Type: Online
Your2Cents Physicians/Health Care Professionals
Size: 500,000+ Type: Online
Your2Cents Small Business Owners
Size: 150,000+ Type: Online
Your2Cents VideoGamers
Size: 120,000+ Type: Online
Your2Cents4Teens
Size: 60,000+ Type: Online

GENESYS Sampling Systems offers the Your2Cents® Online Opinion Panel which provides access to millions of active, highly profiled, Internet-connected households including adults, teens, and children, plus specialty panels of health care professionals, ailment sufferers, automotive, IT professionals, and other B2B respondents. Over 500 target selects, unique invitations/reminders, multi-mode sampling approaches and hosting options insure high-quality sample and results.
(See advertisement on p. 65)

GfK Panel Services Consumer Research
Nordwestring 101
90319 Nurenberg
Germany
Ph. 49-911-395-2207
wolfgang.twardawa@gfk.de
www.gfk.de
Wolfgang Twardawa
Panel Titles:
ConsumerScan
Size: 70,000

GfK-NOP Consumer
75 Ninth Ave., 5th Floor
New York, NY 10011
Ph. 212-240-5300
info@nopworld.com
www.nopworld.com
Panel Titles:
NOP Consumer Online Panel
Type: Online

GMI (Global Market Insite, Inc.)
2835 82nd Ave. S.E., Suite S100
Mercer Island, WA 98040
Ph. 206-315-9300
infoq@gmi-mr.com
www.gmi-mr.com
Sean Case, Managing Director, Sales
Proprietary Panel Mgmt.: Yes
Panel Titles:
GMI African American Panel
Size: 112,000 Type: Online
GMI Business Panel
Size: 278,000 Type: Online
GMI Child Panel
Size: 214,000 Type: Online
GMI Consumer Panel
Size: 5,500,000 Type: Online
GMI Hispanic Panel
Size: 78,000 Type: Online
GMI IT Panel
Size: 587,000 Type: Online
GMI Medical Panel
Size: 1,000,000 Type: Online
GMI Patient Panel
Size: 259,000 Type: Online
GMI Teen Panel
Size: 205,000 Type: Online
GMI Travel Panel
Size: 220,000 Type: Online
GMI Vehicle Panel
Size: 227,000 Type: Online

Drawing from one of the world's largest actively managed consumer panels, GMI Global Panels offer unparalleled panel integrity. Highly profiled, double opt-in panel recruitment, superior incentives, and 24/7 customer service in 35 languages, result in the highest response rates and among the lowest attrition rates. With GMI Global Panels, you can access sample with confidence.
(See advertisement on pp. 7, 91)

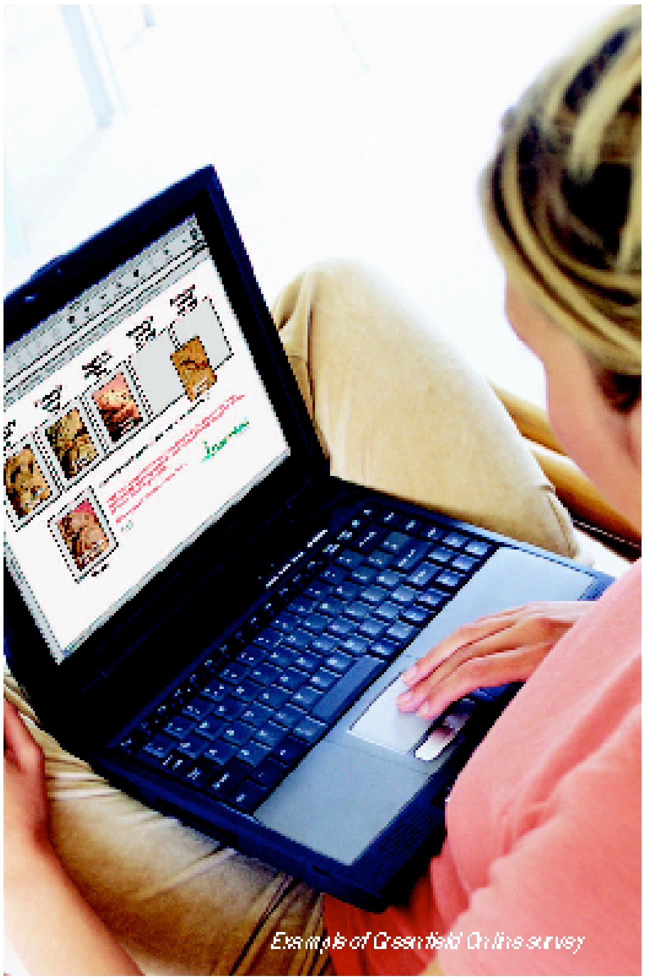
goZing
16501 Ventura Blvd., Suite 250
Encino, CA 91436
Ph. 818-385-3414
matt@gozing.com
www.gozing.com
Panel Titles:
GoZing Cash Survey
Type: Online

Grace Market Research, Inc.
3864 Clayton Ave.
Los Angeles, CA 90027
Ph. 213-660-2483
gmrnet1@gmrnet.com
www.gmrnet.com
George Grace, President
Panel Titles:
GMR Panel
Size: 65,000 Type: Online

Greenfield Online
21 River Rd.
Wilton, CT 06897
Ph. 203-834-8585
solutions@greenfield.com
www.greenfield.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Greenfield Online Ailment Sufferers Panel
Type: Online
Greenfield Online Auto Panel
Size: 150,000 Type: Online
Greenfield Online B2B/IT Panel
Size: 21,000 Type: Online
Greenfield Online Global Panel
Size: 3.6 Mil. North Amer./1.8 Mil Europe Type: Online
Greenfield Online Leisure Activities Panel
Size: 202,000 Type: Online
Greenfield Online Moms & Babies Panel
Size: 112,000 Type: Online
Greenfield Online Physicians Panel
Size: 36,000+ Type: Online
Greenfield Online Teen Panel
Size: 250,000+ Type: Online

Since 1994, Greenfield Online has been enabling the industry's top marketing research companies to conduct surveys via the Internet. We've built and actively manage the Greenfield Online panel, one of the largest, most robust and demographically diverse panels in the world. This unsurpassed access to respondents is coupled with advanced research technologies and survey designs.
(See advertisement on opposite page)

Harris Interactive®
Corporate Headquarters
135 Corporate Woods
Rochester, NY 14623
Ph. 877-919-4765
info@harrisinteractive.com
www.harrisinteractive.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Harris Interactive Gay, Lesbian & Bisexual
Type: Online
Harris Interactive Pet Companion Panel
Type: Online
Harris Interactive Physician Panel
Type: Online
Harris Interactive Poll
Type: Online
Harris Interactive Poll Affluent Poll
Type: Online
Harris Interactive Technology Decision Makers
Type: Online



Example of Greenfield Online survey

Codes

To search for panels by industry or audience, please use the cross-index section on page 106.

Size: Number of members in the panel
Type: How members are surveyed (mail, telephone, online)

i.think inc.
2811 McKinney Ave., Suite 218
Dallas, TX 75204
Ph. 214-855-3777
bmack@ithinkinc.com
www.ithinkinc.com
Beth Mack, President
Panel Titles:
i.thinker Panel
Size: 1,500,000+ Type: Online

The i.thinker panel of nearly 1.5 million household members is available either as part of an i.think inc. study, or separately as sample-only. Our participants are primarily United States residents. However, we also have excellent representation in Canada, several English speaking European countries, and Australia.
(See advertisement on p. 57)

Informa Research Services, Inc.
26565 Agoura Rd., Suite 300
Calabasas, CA 91302
Ph. 800-848-0218
inquiries@informars.com
www.informars.com
Jackie Weise, Dir. Nat'l/Int'l. Field & Tab
Proprietary Panel Mgmt.: Yes
Panel Titles:
Informa Rsch. Svcs. Shopper/Consumer Panel
Size: 75,000+ Type: Mail, Telephone, Online

InsightExpress, LLC
1351 Washington Blvd.
Stamford, CT 06902
Ph. 877-329-1552 or 203-359-4174
fschapiro@insightexpress.com
www.insightexpress.com
Panel Titles:
Insight Panel

Inter@ctive Market Research srl
Via Scarlatti 150
80127 Naples
Italy
Ph. 39-081-22-92-473
info@imrgroup.com
www.imrgroup.com
Panel Titles:
Inter@ctive Panel Online
Size: 40,000 Type: Online

Ipsos North America
Headquarters
1700 Broadway, 15th Floor
New York, NY 10019
Ph. 212-265-3200
info@ipsos-na.com
www.ipsos-na.com
Panel Titles:
Asia Access Panel
Size: 380,000 Type: Online
European Access Panel
Size: 400,000 Type: Mail, Telephone, Online
Ipsos U.S. Hispanic Panel
Size: 10,000 Type: Telephone, Online
Ipsos U.S. Household Panel
Size: 400,000 Type: Mail, Telephone, Online
Ipsos U.S. Online Panel
Size: 950,000 Type: Online

Ipsos-Insight Ltd.
Kings House, Kymberley Road
Harrow, Middlesex HA1 1PT
United Kingdom
Ph. 44-20-8861-8000
ianne.ward@ipsos.com
www.ipsos-uk.com
Panel Titles:
Ipsos Online Panel
Type: Online

JRA: Global Healthcare Research Services
J. Reckner Associates, Inc.
587 Bethlehem Pike, Suite 800
Montgomeryville, PA 18936-9742
Ph. 215-822-6220
GHRS03@reckner.com
www.reckner.com
Susan Phillippe
Panel Titles:
JRA Healthcare Professionals Panel
Size: 175,000 Type: Telephone, Online
JRA Physicians Panel
Size: 315,000 Type: Telephone, Online

JRA's proprietary database of 315,000 cooperating physicians includes 70,000 e-mail addresses, 130,000 fax numbers. Our database of 175,000 health care professionals includes pharmacists, dentists, and nurses. Global field management and data processing. Recruiting by phone, fax or Web. Web expertise includes programming, hosting, data processing. 24/7 reporting via JRA PartnerNet.
(See advertisement on p. 97)

KL Communications, Inc.
46 English Plaza, Suite 6
Red Bank, NJ 07701
Ph. 732-224-9991
klc@klcom.com
www.klcom.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Consumer Directions
Size: 10,000 Type: Online

Knowledge Networks
1350 Willow Road, Suite 102
Menlo Park, CA 94025
Ph. 650-289-2000
info@knowledgenetworks.com
www.knowledgenetworks.com
David Stanton, V.P., Marketing Comm.
Panel Titles:
Knowledge Networks Panel
Size: 40,000 Type: Online

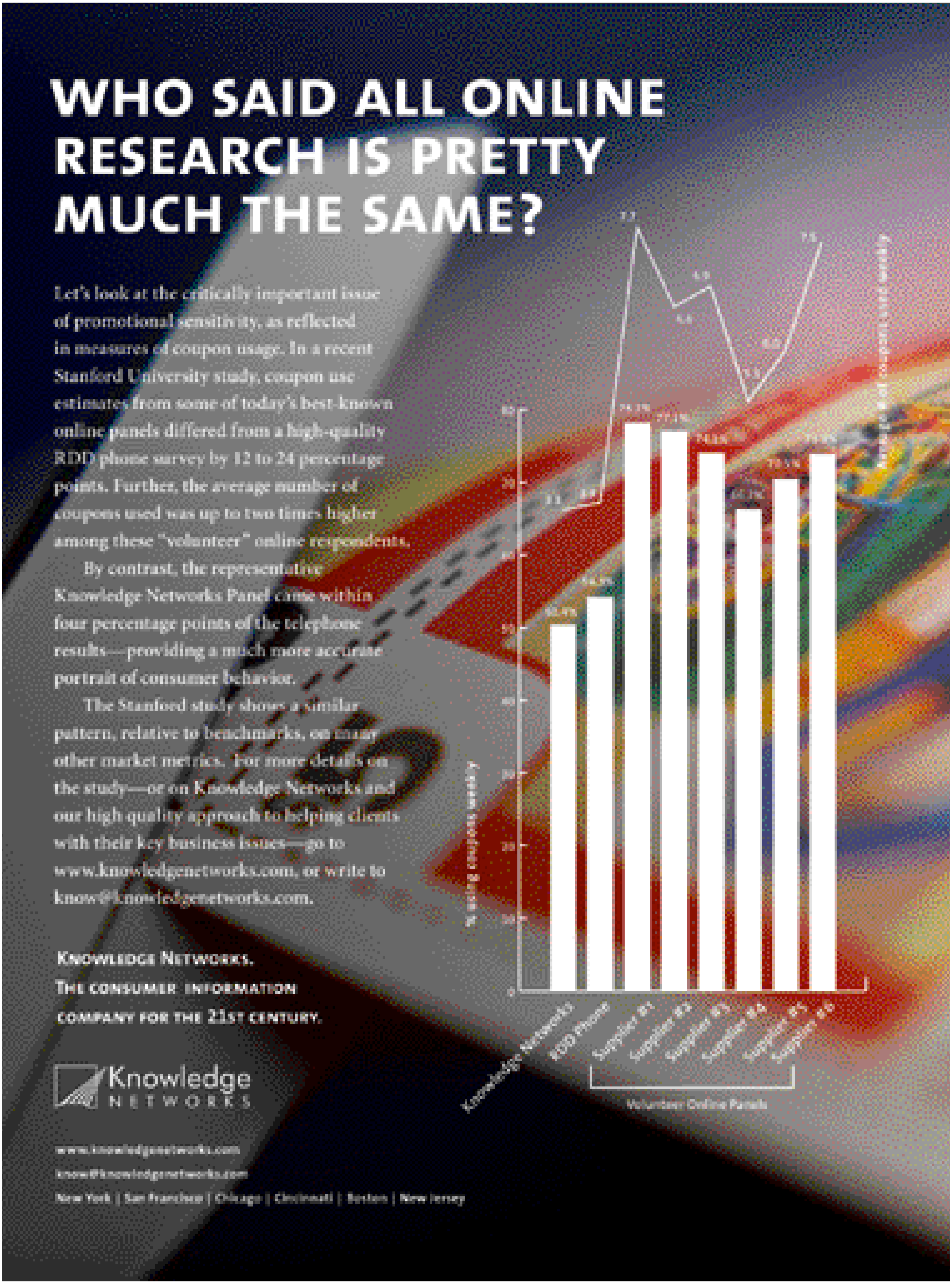
Knowledge Networks delivers quality you can use—superior methodologies, design, and analysis that gives you an edge when it comes to making smart, safe business decisions. KN's unmatched consumer research resources include the only projectable Web-based consumer panel; its superior reliability has been affirmed by university and other studies.
(See advertisement on opposite page)

Korea Panel Research (KPR)
4th Floor Hwashin Building
31-12 Chamwon-dong, Seocho-Ku
Seoul 137-030
South Korea
Ph. 82-2-3444-4000
webmaster@panel.co.kr
www.panel.co.kr

Lieberman Research Worldwide
1900 Avenue of the Stars, 15th Floor
Los Angeles, CA 90067
Ph. 310-553-0550
dsackman@lrwonline.com
www.lrwonline.com
Panel Titles:
Opinionsite.com Panel
Size: 150,000+ Type: Online

Opinionsite.com is a full-service Internet research company, offering an extensive panel and online data collection services in conjunction with Lieberman Research Worldwide's sophisticated study design, analysis and deep insight into marketing solutions. While Lieberman already has broad experience in Internet research, Opinionsite.com provides access to superior technology and an outstanding panel.
(See advertisement on p. 36)

Lightspeed Research
180 Mt. Airy Rd., Suite 100
Basking Ridge, NJ 07920
Ph. 908-630-0542
us@lightspeedresearch.com
www.lightspeedresearch.com
Panel Titles:
Lightspeed Consumer Panel
Type: Online


WHO SAID ALL ONLINE RESEARCH IS PRETTY MUCH THE SAME?
Let's look at the critically important issue of promotional sensitivity, as reflected in measures of coupon usage. In a recent Stanford University study, coupon use estimates from some of today's best-known online panels differed from a high-quality RDD phone survey by 12 to 24 percentage points. Further, the average number of coupons used was up to two times higher among these "volunteer" online respondents.
By contrast, the representative Knowledge Networks Panel came within four percentage points of the telephone results—providing a much more accurate portrait of consumer behavior.
The Stanford study shows a similar pattern, relative to benchmarks, on many other market metrics. For more details on the study—or on Knowledge Networks and our high quality approach to helping clients with their key business issues—go to www.knowledgenetworks.com, or write to know@knowledgenetworks.com.
% using coupons weekly
Knowledge Networks
RDD Phone
Supplier #1
Supplier #2
Supplier #3
Supplier #4
Supplier #5
Supplier #6
Volunteer Online Panels
KNOWLEDGE NETWORKS.
THE CONSUMER INFORMATION COMPANY FOR THE 21ST CENTURY.
Knowledge NETWORKS
www.knowledgenetworks.com
know@knowledgenetworks.com
New York | San Francisco | Chicago | Cincinnati | Boston | New Jersey

Codes

To search for panels by industry or audience, please use the cross-index section on page 106.

Size: Number of members in the panel
Type: How members are surveyed (mail, telephone, online)

Luth Research
1365 Fourth Ave.
San Diego, CA 92101
Ph. 619-234-5884
info@luthresearch.com
www.luthresearch.com
Josh Epstein
Panel Titles:
SurveySavvy
Size: 3,000,000+ Type: Online

Positioned at the forefront of market research for over 25 years, Luth understands the nuances of the industry and completes any project, traditional or groundbreaking, successfully. Built on experience, Luth offers all methodologies of data collection to sample-only solutions from a global panel of over 3 million.
(See advertisement on Inside Back Cover)

Market Equity
Perth Office
Level 1, 1292 Hay Street
West Perth, WA 6005
Australia
Ph. 61-8-9321-5415
field@marketequity.com.au
www.marketequity.com.au
Panel Titles:
The Buzz

Market Insight, Inc.
112 W. Foster Ave., Suite 202-C
State College, PA 16801
Ph. 800-297-7710 or 814-231-2140
frankf@mkt-insight.com
www.mkt-insight.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Health Insights™
Size: 160,000 Type: Mail, Telephone, Online

Market Reader Pro
5741 Memorial Rd.
Germansville, PA 18053
Ph. 610-760-2697
cdahlin@marketreaderpro.com
www.marketreaderpro.com
Proprietary Panel Mgmt.: Yes

Marketing Leverage, Inc.
180 Glastonbury Blvd.
Glastonbury, CT 06033
Ph. 800-633-1422
lkelly@marketingleverage.com
www.marketingleverage.com
Proprietary Panel Mgmt.: Yes

Marketing Solutions Corporation
2 Ridgedale Ave., Suite 216
Cedar Knolls, NJ 07927
Ph. 973-540-9133 or 800-326-3565
MarketingSolutions@attglobal.net
www.marketingsolutionscorp.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Health & Beauty Aids Panel

MarketTools, Inc.
One Belvedere Place
Mill Valley, CA 94941
Ph. 415-462-2200
info@markettools.com
www.markettools.com
Panel Titles:
Zoom Panel
Size: 2,000,000 Type: Mail, Online

MarketVision Research®
10300 Alliance Rd.
Cincinnati, OH 45242
Ph. 513-791-3100
info@mv-research.com
www.mv-research.com
Panel Titles:
Viewpoint Forum
Type: Online

Mars Research
6365 N.W. 6th Way, Suite 150
Fort Lauderdale, FL 33309
Ph. 954-771-7725
joyceg@marsresearch.com
www.marsresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Mars General Consumer Panel
Size: 250,000 Type: Online

MediaTransfer AG Netresearch & Consulting
Rothenbaumchaussee 38
20148 Hamburg
Germany
Ph. 49-40-6696-250
info@mediatransfer.de
www.b2b.mediatransfer.com
Dr. Thomas Rodenhausen, Member of the Board
Proprietary Panel Mgmt.: Yes
Panel Titles:
IDOP (Interactive Dynamic Online Panel)
Size: 250,000 Type: Online

MI3 Market Intelligence Services
Glow Teknologies
6021 S. Syracuse St., Suite 309
Greenwood Village, CO 80111
Ph. 303-221-3540 ext. 382
ted.kendall@mi3intel.com
www.mi3intel.com
Proprietary Panel Mgmt.: Yes

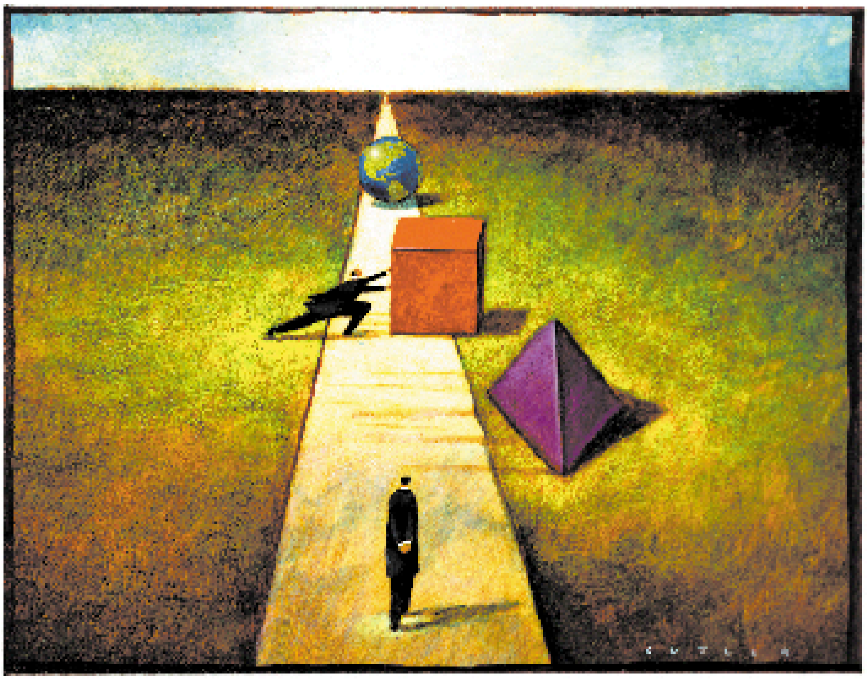
Mindfield Online Internet Panels
(A McMillion Company)
1012 Kanawha Blvd. E., Suite 301
Charleston, WV 25301-2809
Ph. 304-343-9650
jmace@mcmillionresearch.com
www.mindfieldonline.com
Jay Mace, Vice President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Mindfield Electronics and Entertainment Panel
Type: Online
Mindfield General Consumer Panel
Type: Online
Mindfield Grocery Brands Panel
Type: Online
Mindfield Health and Beauty Aids Brand Panel
Type: Online
Mindfield Homeowner and Lawncare Panel
Type: Online
Mindfield Mothers - Children and Teen Panel
Type: Online
Mindfield Pet Owner Panel
Type: Online
Mindfield Physician Panel
Type: Telephone, Online
Mindfield Travel and Leisure Panel
Type: Online
Mindfield Vision Care Panel
Type: Online

Mindfield is your high-quality source for online research with no minimum panel fees. Using the most sophisticated combination of software and hardware and the latest in fiber technology, put the power of Mindfield behind your projects. We provide 24-7 project management and monitoring, online reporting, and our programmers are dedicated to your needs throughout all phases of your research.
(See advertisement on Inside Front Cover)

Mobile Memoir, LLC
16200 Dallas Pkwy., Suite 140
Dallas, TX 75248-2684
Ph. 512-342-2330
info@mobilememior.com
www.mobilememoir.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Your2Cents Cellphone Survey Panel

NAHB Research Center
400 Prince George's Blvd.
Upper Marlboro, MD 20774
Ph. 800-638-8556 or 301-430-6297
kflament@nahbrc.org
www.nahbrc.org
Panel Titles:
NAHB Builder Panel
Size: 2,500 Type: Mail, Telephone, Online
NAHB Consumer Panel
Size: 40,000 Type: Online

National Market Measures, Inc.
25109 Detroit Rd., Suite 330
Cleveland, OH 44145
Ph. 440-892-8555
www.nmminc.com
Panel Titles:
Online eVAL
Type: Online



Codes

To search for panels by industry or audience, please use the cross-index section on page 106.

Size: Number of members in the panel
Type: How members are surveyed (mail, telephone, online)

New Jersey Institute for Successful Aging Research Call Center
University of Medicine & Dentistry of NJ
42 E. Laurel Rd.
Stratford, NJ 08084
Ph. 877-NJ-AGING or 877-652-4464
BrillJe@umdnj.edu
Panel Titles:
ORANJ BOWL (Ongoing Rsch. on Aging in NJ)
Size: 2,000+ Type: Telephone

Nima Hunter Inc.
250 E. 40th St., 26D
New York, NY 10016
Ph. 212-922-9899
info@nimahunter.com
www.nimahunter.com
Donald Carl, President
Panel Titles:
Opinion Leader Panels

NJW Research

NJW Research
42 Catherine St.
Poughkeepsie, NY 12601
Ph. 845-471-7445
answers@njwresearch.com
www.njwresearch.com
Gerry West, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Insights Panels
Size: Client Specific Type: Online

Full-service Web surveys. Insights Panels features Account Manager. Account Manager keeps you in control of your panel. We do questionnaire setup, data collection, tabulations and panel management. We offer annual subscription, or components. SPSS standard on all components - Web survey software, online coding, data mining and tabulations. SPSS data and labels are in the same file - an advantage for cost, turnaround time and optional advanced analysis. Ability to do your own additional analysis from your crosstabs.
(See advertisement on this page)

NovaTest
104, rue Amelot
75011 Paris
France
Ph. 33-1-43-55-29-29
vterradot@novatest.fr
www.novatest.fr
Panel Titles:
Global Test Market
Size: 1,400,000 Type: Online
Postal Pharmacare
Size: 2,000

The NPD Group, Inc.
900 West Shore Rd.
Port Washington, NY 11050
Ph. 516-625-0700
info@npd.com
www.npd.com
Panel Titles:
NPD Online Research Panel
Size: 2,500,000 Type: Online

The Olson Research Group, Inc.
Princeton Crossroads Corporate Center
300 Phillips Blvd., Suite 100
Ewing, NJ 08618
Ph. 609-882-9888
LWelsh@olsonresearchgroup.com
www.olsonresearchgroup.com
Lynn Welsh
Proprietary Panel Mgmt.: Yes

OPINION SEARCH

Opinion Search Inc.
160 Elgin Street, Suite 1800
Ottawa, ON K2P 2P7
Canada
Ph. 800-363-4229 or 613-230-9109
info@opinionsearch.com
www.opinionsearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
eVox
Size: 80,000 Type: Online
Small & Medium Business
Size: 40,000 Type: Online

Opinion Search Inc. offers two online panels complete with online survey programming, hosting, coding and crosstabulation. Our Consumer Panel has over 80,000 profiled participants from across Canada. The Small and Medium Canadian Business Panel is growing from a base of 4,000 entrepreneurs and executives. Using our proprietary dataCAP, clients can access their online survey data 24/7 anywhere with Internet access.
(See advertisement on Back Cover)

Osterman Research, Inc.
P.O. Box 1058
Black Diamond, WA 98010-1058
Ph. 253-630-5839
info@ostermanresearch.com
www.ostermanresearch.com
Michael Osterman
Panel Titles:
Osterman Research Panel
Type: Online

PEARSON
MARKET & OPINION INTELLIGENCE

Pearson, S.A. de C.V.
Homero 223-4to. Piso
Col. Polanco
Mexico, DF 11560
Mexico
Ph. 52-55-5531-5560 or 52-55-5531-5324
pearson@pearson-research.com
www.pearson-research.com
Manuel Barberena, CEO
Panel Titles:
Pearson Mexican Consumer Panel
Size: 3,000+ Type: Online

Pearson was the first Mexican company to offer Web surveys. Today Pearson has its own panel of more than 3,000 Web surfers. What do Internet panels do? Although Internet use in Mexico is low (roughly 3% of the total population and 15% of the population in larger cities), Internet panels allow us to carry out a wide variety of studies under much more competitive time and cost conditions than any other medium. The panel is ideal for learning about the characteristics of Internet users, market potential, advertising impact as well as any Web-related subject such as the potential of new products and services, online advertising or brand research.
(See advertisement on p. 32)

PEOPLE✓PANEL

The People Panel
(Div. of Marketing Evaluations,The Q Scores Co.)
1615 Northern Blvd.
Manhasset, NY 11030
Ph. 516-365-7979
www.qscores.com
Steve Levitt, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
The People Panel - Consumer Panel
Size: 100,000 Type: Mail, Telephone

The People Panel was built in 1980 in order to provide Marketing Evaluations, the Q Scores Company, with a higher-quality and more responsive source of panel data collection. With its 100,000 respondents, The People Panel achieves 60-70% response rates on every study, including concept tests, tracking studies and product tests. This panel is an excellent source for matching samples when testing multiple concept and product alternatives.
(See advertisement on this page)

Persuadable Research Corporation
Corporate Woods 6
8900 Indian Creek Parkway, Suite 220
Overland Park, KS 66210
Ph. 913-385-1700 ext. 302 or 913-385-1700 Ext. 331
cmiller@persuadables.com
www.persuadables.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Persuadable Research Panel
Size: 1,000,000 Type: Online

Pulse Group
Level 20, Tower 2 Darling Park
201 Sussex Street
Sydney, NSW 2009
Australia
Ph. 612-9006-1695
bob.chua@pulse-group.com
www.pulse-group.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
www.planet-pulse.com
Size: 1,000,000 Type: Online

QFACT Marketing Research, LLC.
9908 Carver Rd.
Cincinnati, OH 45242
Ph. 513-891-2271
info@qfact.com
www.qfact.com
Panel Titles:
OfftheCufflink.com

Quickwise AB
18 Soho Square
London W1D 3QL
United Kingdom
Ph. 46-8-4100-58-10
www.quickwise.com
http://quickwise.uk.com
Panel Titles:
Quickwise Panel UK
Type: Online
Quickwise Scandinavia
Type: Online

Codes

To search for panels by industry or audience, please use the cross-index section on page 106.

Size: Number of members in the panel
Type: How members are surveyed (mail, telephone, online)

ReRez
18333 Preston Rd., Suite 425 MB #7
Dallas, TX 75252
Ph. 214-239-3939
debbiep@rerez.com
www.rerez.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
ReRez B2B Panel
Type: Telephone, Online
ReRez Consumer Panel
Type: Telephone, Online
ReRez Hispanics Panel
Type: Telephone, Online
ReRez Physicians Panel
Type: Telephone, Online

Service-based market research firm. Sample and methodology consultants offering a multi-panel partner solution. 14+ million online panelists worldwide including consumer, B2B. Low-incidence, decision makers, IT, physicians and Hispanics. 400+ segmentation variables. Specialize in Internet surveys, online panel, virtual focus groups, and IVR. Programming and online real-time reporting. Fast turn-around, flexible pricing, and accountable to get the job done.
(See advertisement on this page)

Research Now
66 South Lambeth Rd.
London SW8 1RL
United Kingdom
Ph. 44-20-7091-7800
andrew@researchnow.co.uk
www.researchnow.co.uk
Panel Titles:
Alta Opinione - Online Italian Panel
Size: 80,000 Type: Online
Irish Opinions - Online Irish Panel
Size: 20,000 Type: Online
Meinungs Studie - Online German Panel
Size: 110,000 Type: Online
Meinungs Studie - Online Austrian Panel
Size: 8,000 Type: Online
Mums Opinion - Online Mother Panel
Size: 20,000 Type: Online
Opiney Gane - Online Spanish Panel
Size: 110,000 Type: Online
Opinion8d - Online Teen Panel
Size: 20,000 Type: Online
Valued Opinions - Online Australian Panel
Size: 60,000 Type: Online
Valued Opinions - Online UK Panel
Size: 270,000 Type: Online
Votre Panel - Online French Panel
Size: 110,000 Type: Online

Research Now are Europe's leading independent online data collection and panel specialists, with high-quality research-only panels across Europe and Australia with access to over 700,000 members. Research Now offers experience and expertise in all aspects of online data collection techniques and panels, including multi-country/multi-lingual projects, full-service online data collection, high-quality sample provision, and a dedicated client service team on hand to help and advise.
(See advertisement on opposite page)

Resource Systems Group, Inc.
55 Railroad Row
White River Junction, VT 05001
Ph. 802-295-4999
cadams@rsginc.com
www.rsginc.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Fortunecouncil.com
Size: 7,500 Type: Online
Momconnection.com
Size: 8,000 Type: Online
Surveycafe.com
Size: 100,000 Type: Online


Need International Online Sample?
Talk to Research Now – Europe's Leading Online Data Collection Specialists
Owners of the 700,000 strong "Valued Opinions" family of online panels across Europe
Highest quality international online panels – research only, multi-sourced and frequently refreshed
London based multi-lingual team experienced in international projects
Independently owned
Call or email us now for help or advice on any aspect of international online data collection and panels.
Telephone: 011 44 20 7091 7800
or email: service@researchnow.co.uk
RESEARCH NOW !
The European Online Fieldwork and Panel Specialists
www.researchnow.co.uk www.valuedopinions.com
Research Now plc, 66 South Lambeth Road London SW8 1RL England

Codes

To search for panels by industry or audience, please use the cross-index section on page 106.

Size: Number of members in the panel
Type: How members are surveyed (mail, telephone, online)

RestaurantInsights.com
111 Stonemark Lane, Suite 109
Columbia, SC 29210
Ph. 803-798-6373
fred@restaurantinsights.com
www.restaurantinsights.com
Fred Efird
Panel Titles:
RestaurantInsights.com Consumer Panel
Size: 3,000,000

RONIN Focus
43 Palace Street
London SW1E 5ZN
United Kingdom
Ph. 44-20-7903-7000
azr@ronin.com
www.ronin.com
Anron Richter, Bus. Dev. Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
RONIN IT Panel
Size: 8,000 Type: Online
RONIN Pharma Panel
Size: 6,000 Type: Online

Sample Czar, Inc.
940 N. Orange Dr., Suite 204
Hollywood, CA 90038
Ph. 323-337-1155
dlowell@sampleczar.com
www.sampleczar.com
Douglas Lowell, President
Proprietary Panel Mgmt.: Yes

Sample Czar is a premium Internet sample provider that provides sample in all targets: consumer, B2B, international, teens, technology, physicians, Hispanics, etc. We have great international capability in all markets where major market research is currently being conducted.
(See advertisement on opposite page)

Shifrin-Hayworth
20300 Civic Center Dr., Suite 207
Southfield, MI 48076
Ph. 248-223-0020 or 800-559-5954
research@shifrin-hayworth.com
www.shifrin-hayworth.com
Mark Shifrin, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
National Database - USA
Size: 300,000 Type: Mail, Telephone, Online

Signet Research, Inc.
613 Anderson Ave.
Cliffside Park, NJ 07010
Ph. 201-945-6903 or 201-945-6904
sales@signetresearch.com
www.signetresearch.com
Joanna Zanopoulo, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Readers Panels - Publication Specific-Customised

Specpan
6640 Intech Blvd., Suite 100
Indianapolis, IN 46278
Ph. 866-SPECPAN
sales@specpan.com
www.specpan.com
Panel Titles:
Building & Construction Industry Professionals
Size: 11,000 Type: Online

SpectraCom, Inc.
131 W. Seeboth St.
Milwaukee, WI 53204-1445
Ph. 414-272-7742
sally.schmidt@spectracom.com
www.spectracomresearch.com
Sally Schmidt, Research Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
SpectraCom Research Panel
Size: 25,000 Type: Online

Sports Marketing Surveys Ltd.
The Courtyard
Wisley, Surrey GU23 6QL
United Kingdom
Ph. 44-1932-350600
info@sportsmarketingsurveys.com
www.sportsmarketingsurveys.com
Panel Titles:
Sporting Insights
Size: 40,000 Type: Online

Strategic Directions Group, Inc.
(Boomers & Their Elders a div. of Strategic Directions Group, Inc.)
66 E. Ninth St., Suite 1407
St. Paul, MN 55101
Ph. 651-228-7250
cmorgan@strategicdirectionsgroup.com
www.boomersandtheirelders.com
Panel Titles:
Boomers & Their Elders
Size: 25,000 Type: Mail

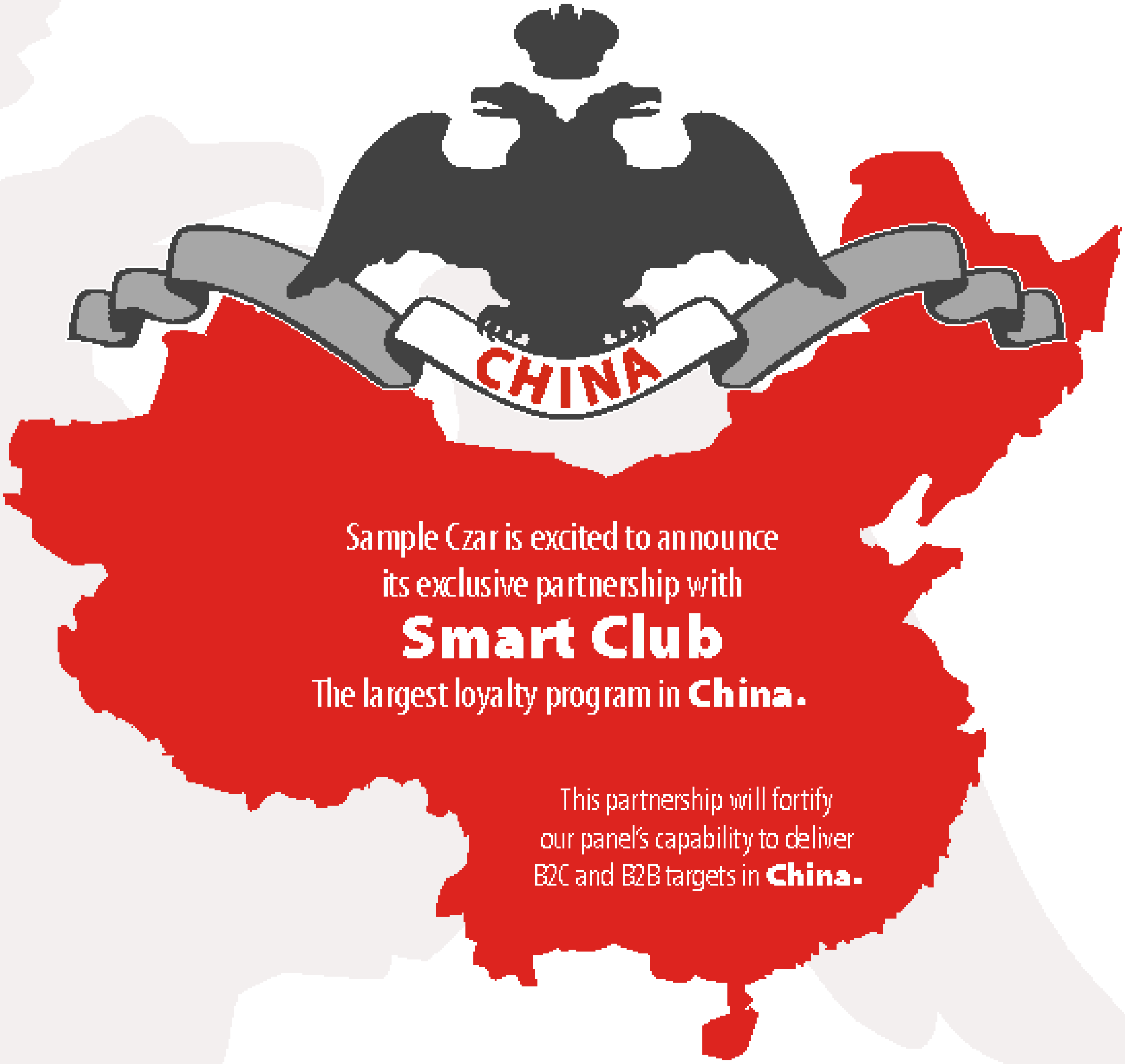
Survey Sampling International
One Post Rd.
Fairfield, CT 06824
Ph. 203-255-4200
info@surveysampling.com
www.surveysampling.com
Terrence Coen or Christopher, DeAngelis
Proprietary Panel Mgmt.: Yes
Panel Titles:
Surveyspot.com (USA)
Size: 3,800,000 Type: Online
www.Asiktstorget.com (Sweden)
Type: Online
www.Meinungswelt.at (Austria)
Type: Online
www.Meinungswelt.com (Germany)
Type: Online
www.Meinungswelt.com (Switzerland)
Type: Online
www.Meningstorget.no (Norway)
Type: Online
www.Mielipidemaailma.com (Finland)
Type: Online
www.Mondodiopnione.it (Italy)
Type: Online
www.Opinieland.be (Belgium)
Type: Online
www.Opinieland.nl (Netherlands)
Type: Online
www.Opinionsland.com (Denmark)
Type: Online
www.Opinionworld.co.uk (UK)
Type: Online
www.Opiolandia.com (Spain)
Type: Online
www.Placedesopinions.com (France)
Type: Online
www.Swiatopinii.pl (Poland)
Type: Online

Survey Sampling International (SSI) has cultivated the most dependable, diverse line of Internet and telephone sampling solutions in the industry because sampling is our only focus - and has been for nearly 30 years. As a result, SSI's retention rate for its top clients has been at 100% for the past two years. SSI supports - never competes with - over 1,200 research agencies worldwide including 43 of the top 50 U.S. research firms. SSI - sample you can trust from the company you can trust.
(See advertisement on p. 61)

Survey.com
1245 S. Winchester Blvd., Suite 200
San Jose, CA 95128
Ph. 408-850-1227
sales@survey.com
www.survey.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Business ePanel
Size: 250,000+ Type: Online
C-Level Executive ePanel
Size: 50,000+
Consumer ePanel
Type: Online
IT Decision Maker ePanel
Size: 50,000+ Type: Online
Youth ePanel
Size: 20,000,000+ Type: Online

SAMPLE CZAR

Sample Provider for Online Surveys



Sample Czar is excited to announce
its exclusive partnership with

Smart Club

The largest loyalty program in **China.**

This partnership will fortify
our panel's capability to deliver
B2C and B2B targets in **China.**

Contact Us
For Sample Inquiries & RFQ's:
Email us at rfq@sampleczar.com
or dlowell@sampleczar.com

or call (323) 337-1155

Codes

To search for panels by industry or audience, please use the cross-index section on page 106.

Size: Number of members in the panel
Type: How members are surveyed (mail, telephone, online)

Synovate
222 South Riverside Plaza
Chicago, IL 60606
Ph. 312-526-4000
viewsnet@synovate.com
www.synovate.com
Peter Bonavia, Manager ViewsNet Analytics
Proprietary Panel Mgmt.: Yes
Panel Titles:
Synovate Automotive Panel
Size: 400,000+ Type: Mail, Telephone, Online
Synovate Financial Panel
Size: 200,000+ Type: Mail, Telephone, Online
Synovate Global Opinion Panels - Asia Pacific
Size: 25,000+ Type: Mail, Telephone, Online
Synovate Global Opinion Panels - Western Europe
Size: 120,000+ Type: Mail, Telephone, Online
Synovate Global Opinion Panels-North America
Size: 1,800,000+ Type: Mail ,Telephone, Online
Synovate Health Conditions Panel
Size: 250,000+ Type: Mail, Telephone, Online
Synovate Technology Panel
Size: 250,000+ Type: Mail, Telephone, Online
Synovate Travel & Leisure Panel
Size: 250,000+ Type: Mail, Telephone, Online
Synovate Voice of the Hispanic Family
Size: 15,000+ Type: Mail, Telephone

Taylor Nelson SOFRES Hong Kong SAR
3F Sun Hung Kay Centre
30 Harbour Rd
Hong Kong
Hong Kong
Ph. 852-2891-1175
office.hk@tns-global.com
www.tns-global.com
Linda Sau
Panel Titles:
6th Dimension Asian Panel
Size: 10,000 Type: Online

Taylor Nelson SOFRES plc.
Westgate
London W5 1UA
United Kingdom
Ph. 44-20-8967-0007
enquiries@tnsofres.com
www.tnsofres.com
Judith Passingham
Panel Titles:
6th Dimension Consumer Panel
TNS Worldpanel

Team Vier b.v.
Veenplaats 19
1182 JW Amstelveen
Netherlands
Ph. 31-20-645-53-55
info@teamvier.nl
www.teamvier.nl
Hans Van Gool
Proprietary Panel Mgmt.: Yes
Panel Titles:
Team Vier CATI Panel
Size: 12,000 Type: Telephone
Team Vier WAPI Panel
Size: 8,000 Type: Online

TechTarget, Inc.
117 Kendrick St., Suite 800
Needham, MA 02494
Ph. 781-657-1000
tcogan@techtarget.com
www.techtarget.com
Toby Cogan, Market Research Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
TechTarget IT Research Panel
Size: 500,000 Type: Online

Think Virtual Fieldwork
50 Washington St., 7th Floor
Norwalk, CT 06854
Ph. 203-354-4544
ray@thinkvirtualfieldwork.com
www.thinkvirtualfieldwork.com
Proprietary Panel Mgmt.: Yes

Untiedt Research GmbH
Denkmalstrabe 2
45529 Hattigen
Germany
Ph. 02324-98-33-91
info@untiedt.de
www.untiedt.de
Panel Titles:
ArchitekenTrend: Architect Panel
Size: 300 Type: Online
HandwerkerTrend: Plumber Panel
Size: 400 Type: Online
MediTrend: Physician Panel
Size: 400 Type: Online
WebPanel
Type: Online
WebPanel Global
Type: Online

Virtual Surveys Ltd.
Virtual House, 3 Seton Drive
Hook, Hampshire RG27 9QS
United Kingdom
Ph. 44-125-676-7576
info@virtualsurveys.com
www.virtualsurveys.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
UK Opinion Panel
Size: 30,000 Type: Online

VISIONCRITICAL™

Vision Critical
1111 W. Georgia St., Suite 1750
Vancouver, BC V6E 4M3
Canada
Ph. 604-647-1980
info@visioncritical.com
www.visioncritical.com
Jason Smith, Sr. V.P. Sales & Marketing
Proprietary Panel Mgmt.: Yes

Vision Critical provides companies with tools that simplify, empower and enrich online market research. Panel+ is a robust, flexible and cost-effective panel management system that will take care of everything, from profiling to surveys to reporting. Find out what organizations like Nestle, Virgin Mobile and Reebok already know about Panel+. For more information, to www.visioncritical.com.
(See advertisement on p. 58-59)

WorldOne Research
Unit 2 & 3, Unity Wharf
13 Mill Street
London SE1 2BH
United Kingdom
Ph. 44-20-7252-1118
info@w1-research.com
www.w1-research.com
Panel Titles:
WorldOne's Global Physician Panel
Size: 65,000 Type: Online

your2cents
online opinion panel

Your2Cents Online Opinion Panel
16200 Dallas Pkwy., Suite 140
Dallas, TX 75248-6897
Ph. 866-249-4295 or 800-710-9147
getinfo@your2cents.com
www.your2cents.com/info
Steve Lavine, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Your2Cents Ailments & Care Givers
Size: 475,000+ Type: Online
Your2Cents Business-2-Business
Size: 2,500,000 Type: Online
Your2Cents Cellphone Survey Panel
Size: 165,000+
Your2Cents IT Prof./Tech. Users/Dec. Makers
Size: 25,000+ Type: Online
Your2Cents Online Opinion Panel
Size: 3,750,000 Type: Online
Your2Cents Physicians/Health Care Professionals
Size: 500,000+ Type: Online
Your2Cents Small Business Owners
Size: 150,000+ Type: Online
Your2Cents VideoGamers
Size: 120,000+ Type: Online
Your2Cents4Teens
Size: 60,000+ Type: Online

Your2Cents®, Common Knowledge Research Services' online opinion panel, provides access to millions of active, highly profiled, Internet-connected households, including adults, teens, and children, plus specialty panels of healt care professionals, ailment sufferers, automotive, IT professionals, and other B2B respondents. Profiling includes over 500 target selects, including household demographics and major usage and purchase categories. Strict limits on study participation help prevent panelists from becoming overly conditioned to the survey process. Respondents can be delivered to your programming or ours. Call the experts at Your2Cents today and see why we've been a trusted source of high-quality sample for the marketing research industry since 1995!
(See advertisement on opposite page)

Zapera.com A/S
Ryesgade 3
2200 Copenhagen N
Denmark
Ph. 45-70-27-22-24
info@zapera.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Country Panel Denmark
Country Panel Estonia
Country Panel Finland
Country Panel Norway
Country Panel Sweden

Make your move to Your2Cents® Online Opinion Panel.

With 3.75 million active members and over 500 target selects, it's the move that makes you a winner!

Using an online panel should *not* be like a roll of the dice. Other panels claim millions of members, but what they don't tell you is that as few as 20% of their panelists are taking 80% of their surveys. Not so with Your2Cents:

- We maintain a rolling average of 1.5 million active households — that's about ***3.75 million active members*** — which gives us the most active consumer panel in the industry!
- Our panelists average ***less than 2 completed surveys per month*** — and that's how we want it. This helps keep our panelists from becoming over-conditioned to the survey process.

Better profiling leads to ***faster and less expensive targeting.*** With ***over 500 target selects*** — *hundreds* more than most other companies, including ***specialty panels for B2B, IT decision-makers, healthcare professionals, ailment sufferers, automotive, and teens*** — we can quickly identify the appropriate respondents for your surveys. We also verify and enhance our own profiling information with data from the most respected consumer databases to bring you *the* most accurate panel profiling available. Respondents can be delivered to your programming or ours.

Your2Cents also offers other unique features that help ***increase survey response rates*** and ensure that surveys embrace infrequent or non-web users to make results ***more representative*** of the population:

- Survey invitations and reminder systems using voice mail, instant messaging, mobile text messaging, and desktop applications
- Multi-mode sampling approaches that combine Internet with mail or telephone surveys

When it comes to online panel, Your2Cents will help you win the game! We never charge an extra penny for higher active rates, more target selects, and better response and representation. Go directly to Your2Cents and discover for yourself why our approach has been bringing our clients back over and over again since 1995.

COMMON KNOWLEDGE RESEARCH SERVICES®

your2cents® online opinion panel

Winning Online Solutions. Reliable. Flexible. Affordable.

16200 Dallas Parkway • Suite 140 • Dallas, Texas 75248-6807 • 888-240-4296 • Fax 972-732-1447 • Email: getinfo@your2cents.com • Web: www.your2cents.com/info
Eastern Sales Office: 800-461-0780 • Western Sales Office: 888-588-7888

Your2Cents Online Opinion Panel now available from your GENESYS account executive. Call 800-336-7674

African-American

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 86
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Concept Development, Consumer Link p. 88
Consumer Link Consumer Research, Consumer Link p. 88
Consumer Link Customer Satisfaction, Consumer Link p. 88
Consumer Link Ethnographic Research, Consumer Link p. 88
Consumer Link Focus Groups, Consumer Link p. 88
Consumer Link Home Use Tests, Consumer Link p. 88
Consumer Link ProductTesting Research, Consumer Link p. 88
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
Dataintelligence ONLINE, Datatelligence Online p. 88
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
GMI African American Panel, GMI (Global Market Insite, Inc.) p. 92
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 92
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
Mars General Consumer Panel, Mars Research p. 96
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Mothers - Children & Teen Panel, Mindfield Online Panels p. 96
Mindfield Pet Owner Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Opinion Place, DMS Research p. 89
ORANJ BOWL, New Jersey Institute for Successful Aging Research p. 98
Readers Panels, Signet Research, Inc. p. 102
ReRez Consumer Panel, ReRez p. 100
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
The African-American Consumer, ACNielsen - The Americas p. 86
The People Panel - Consumer Panel, The People Panel p. 99
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

Asians

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 86
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Concept Development, Consumer Link p. 88
Consumer Link Consumer Research, Consumer Link p. 88
Consumer Link Customer Satisfaction, Consumer Link p. 88
Consumer Link Ethnographic Research, Consumer Link p. 88
Consumer Link Focus Groups, Consumer Link p. 88
Consumer Link Home Use Tests, Consumer Link p. 88
Consumer Link ProductTesting Research, Consumer Link p. 88
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
Cross-Tab Indian Consumer Panel, Cross-Tab Marketing Services Pvt. Ltd. p. 88
Cross-Tab Panel of IT Professionals, Cross-Tab Marketing Services Pvt. Ltd. p. 88
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 92
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Mothers - Children & Teen Panel, Mindfield Online Panels p. 96
Mindfield Pet Owner Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Opinion Place, DMS Research p. 89
Readers Panels, Signet Research, Inc. p. 102
ReRez Consumer Panel, ReRez p. 100
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
www.planet-pulse.com, PulseGroup p. 99
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

Children

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 86
Canadian Consumer Panel, Consumer Contact p. 88
Childresearch.com Panel, ChildResearch.com p. 86
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Concept Development, Consumer Link p. 88
Consumer Link Consumer Research, Consumer Link p. 88
Consumer Link Customer Satisfaction, Consumer Link p. 88
Consumer Link Ethnographic Research, Consumer Link p. 88
Consumer Link Focus Groups, Consumer Link p. 88
Consumer Link Home Use Tests, Consumer Link p. 88
Consumer Link Product Testing Research, Consumer Link p. 88
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
CountryPanel Denmark, Zapera.com A/S p. 104
CountryPanel Estonia, Zapera.com A/S p. 104
CountryPanel Finland, Zapera.com A/S p. 104
CountryPanel Norway, Zapera.com A/S p. 104
CountryPanel Sweden, Zapera.com A/S p. 104
DRI Consumer Panel, Digital Research, Inc. p. 89
E-Poll Consumer Panel, E-Poll p. 90
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
GMI Child Panel, GMI (Global Market Insite, Inc.) p. 92
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
Kidscom Club, Circle 1 Network p. 88
KidzEyes.com, C&R Research Services, Inc. p. 86
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Mothers - Children & Teen Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Opinion Place, DMS Research p. 89
Readers Panels, Signet Research, Inc. p. 102
ReRez Consumer Panel, ReRez p. 100
Surveycafe.com, Resource Systems Group, Inc. p. 100
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Synovate Voice of the Hispanic Family, Synovate p. 104
The People Panel - Consumer Panel, The People Panel p. 99
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104
Youth ePanel, Survey.com p. 102

College Students

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 86
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Concept Development, Consumer Link p. 88
Consumer Link Consumer Research, Consumer Link p. 88
Consumer Link Customer Satisfaction, Consumer Link p. 88
Consumer Link Ethnographic Research, Consumer Link p. 88
Consumer Link Focus Groups, Consumer Link p. 88
Consumer Link Home Use Tests, Consumer Link p. 88
Consumer Link Product Testing Research, Consumer Link p. 88
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
CountryPanel Denmark, Zapera.com A/S p. 104
CountryPanel Estonia, Zapera.com A/S p. 104
CountryPanel Finland, Zapera.com A/S p. 104
CountryPanel Norway, Zapera.com A/S p. 104
CountryPanel Sweden, Zapera.com A/S p. 104
E-Poll Consumer Panel, E-Poll p. 90
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
eVox, Opinion Search Inc. p. 98
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 92
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Pet Owner Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Opinion Place, DMS Research p. 89
Readers Panels, Signet Research, Inc. p. 102
ReRez Consumer Panel, ReRez p. 100
Surveycafe.com, Resource Systems Group, Inc. p. 100
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102

SurveySpree, DMS Research p. 89
Synovate Health Conditions Panel, Synovate p. 104
Teen Insight™, Decision Insight, Inc. p. 89
www.planet-pulse.com, PulseGroup p. 99
Your2Cents Cellphone Survey Panel, GENESYS Sampling Systems p. 92
Your2Cents Cellphone Survey Panel, Mobile Memoir, LLC p. 96
Your2Cents Cellphone Survey Panel, Your2Cents Online Opinion Panel p. 104
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

Consumers

6th Dimension Asian Panel, Taylor Nelson SOFRES Hong Kong SAR p. 104
6th Dimension Consumer Panel, Taylor Nelson SOFRES plc. p. 104
Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 86
Alta Opinione - Online Italian Panel, Research Now p. 100
AMR Interactive Consumer Panel, AMR Interactive p. 86
Asia Access Panel, Ipsos North America p. 94
Berenhaus Consumer Panels, Berenhaus Research Solutions, LLC p. 86
Boomers & Their Elders, Strategic Directions Group, Inc. p. 102
Canadian Consumer Panel, Consumer Contact p. 88
Clarian Research Web Panel, Clarion Research p. 88
Consumer Directions, KL Communications, Inc. p. 94
Consumer ePanel, Survey.com p. 102
Consumer Link Concept Development, Consumer Link p. 88
Consumer Link Consumer Research, Consumer Link p. 88
Consumer Link Customer Satisfaction, Consumer Link p. 88
Consumer Link Ethnographic Research, Consumer Link p. 88
Consumer Link Focus Groups, Consumer Link p. 88
Consumer Link Home Use Tests, Consumer Link p. 88
Consumer Link Mystery Shopping, Consumer Link p. 88
Consumer Link ProductTesting Research, Consumer Link p. 88
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
ConsumerScan, GfK Panel Services Consumer Research GmbH p. 92
Country Panel Denmark, Zapera.com A/S p. 104
Country Panel Estonia, Zapera.com A/S p. 104
Country Panel Finland, Zapera.com A/S p. 104
Country Panel Norway, Zapera.com A/S p. 104
Country Panel Sweden, Zapera.com A/S p. 104
Cross-Tab Indian Consumer Panel, Cross-Tab Marketing Services Pvt. Ltd. p. 88
Dataintelligence ONLINE, Datatelligence Online p. 88
DoctorDirectory.com Consumer Panel, DoctorDirectory.com, Inc. p. 90
DRI Consumer Panel, Digital Research, Inc. p. 89
E-Poll Consumer Panel, E-Poll p. 90
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
European Access Panel, Ipsos North America p. 94
eVox, Opinion Search Inc. p. 98
Global Test Market, NovaTest p. 98
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 92
GMR Panel, Grace Market Research, Inc. p. 92
Greenfield Online Global Panel, Greenfield Online p. 92
Homescan, ACNielsen - The Americas p. 86
Homescan Panel Views Survey, ACNielsen - The Americas p. 86
i.thinker Panel, i.think inc. p. 94
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
Intended Users, ACNielsen - The Americas p. 86
Ipsos U.S. Hispanic Panel, Ipsos North America p. 94
Ipsos U.S. Household Panel, Ipsos North America p. 94
Ipsos U.S. Online Panel, Ipsos North America p. 94
Irish Opinions - Online Irish Panel, Research Now p. 100
Knowledge Networks Panel, Knowledge Networks p. 94
Lightspeed Consumer Panel, Lightspeed Research p. 94
Mars General Consumer Panel, Mars Research p. 96
Meinungs Studie - Online German Panel, Research Now p. 100
Meinungs Studie - Online Austrian Panel, Research Now p. 100
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Mothers - Children & Teen Panel, Mindfield Online Panels p. 96
Mindfield Pet Owner Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
NAHB Consumer Panel, NAHB Research Center p. 96
National Database - USA, Shifrin-Hayworth p. 102
NOP Consumer Online Panel, GfK-NOP Consumer p. 92
NPD Online Research Panel, The NPD Group, Inc. p. 98
Online eVAL, National Market Measures, Inc. p. 96
Opiney Gane - Online Spanish Panel, Research Now p. 100
Opinion Place, DMS Research p. 89
Opinionsite.com Panel, Lieberman Research Worldwide p. 94
ORANJ BOWL, New Jersey Institute for Successful Aging Research p. 98
Pearson Mexican Consumer Panel, Pearson, S.A. de C.V. p. 98
Persuadable Research Panel, Persuadable Research Corporation p. 99
Readers Panels, Signet Research, Inc. p. 102
ReRez Consumer Panel, ReRez p. 100
Resonance Survey Panel, Gang & Gang, Inc. p. 90
RestaurantInsights.com Consumer Panel, RestaurantInsights.com p. 102
SmartPanel of Consumers, FGI Research p. 90
SpectraCom Research Panel, SpectraCom, Inc. p. 102
Surveycafe.com, Resource Systems Group, Inc. p. 100
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels - Asia Pacific, Synovate p. 104
Synovate Global Opinion Panels - Western Europe, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Synovate Voice of the Hispanic Family, Synovate p. 104
Team Vier CATI Panel, Team Vier b.v. p. 104
Team Vier WAPI Panel, Team Vier b.v. p. 104
The African-American Consumer, ACNielsen - The Americas p. 86
The Buzz, Market Equity p. 96
The Consumer Research Panel, Consumer Research Centre Ltd. p. 88
The People Panel - Consumer Panel, The People Panel p. 99
Valued Opinions - Online Australian Panel, Research Now p. 100
Valued Opinions - Online UK Panel, Research Now p. 100
Votre Panel - Online French Panel, Research Now p. 100
www.planet-pulse.com, Pulse Group p. 99
Your2Cents Cellphone Survey Panel, GENESYS Sampling Systems p. 92
Your2Cents Cellphone Survey Panel, Mobile Memoir, LLC p. 96
Your2Cents Cellphone Survey Panel, Your2Cents Online Opinion Panel p. 104
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

CPA's/Financial Management

Affordable Samples Online Business Panel, Affordable Samples, Inc. p. 86
AMR Interactive Small/Medium Business Panel, AMR Interactive p. 86
Consumer Directions, KL Communications, Inc. p. 94
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
Executive Advisory Board, Decision Analyst, Inc. p. 89
GMI Business Panel, GMI (Global Market Insite, Inc.) p. 92
Investor Relations Benchmark, Clarion Research p. 88
National Database - USA, Shifrin-Hayworth p. 102
Readers Panels, Signet Research, Inc. p. 102
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
www.planet-pulse.com, Pulse Group p. 99
Your2Cents Business-2-Business, GENESYS Sampling Systems p. 92
Your2Cents Business-2-Business, Your2Cents Online Opinion Panel p. 104

Dentists

All Global Online, all global p. 86
Berenhaus B2B Panels, Berenhaus Research Solutions, LLC p. 86
Consumer Directions, KL Communications, Inc. p. 94
Dental Consulting Network, Caduceus Marketing Research p. 86
GMI Medical Panel, GMI (Global Market Insite, Inc.) p. 92
Greenfield Online Physicians Panel, Greenfield Online p. 92
JRA Healthcare Professionals Panel, JRA: Global Healthcare Rsch. Svces. (Br.) p. 94
Medical Advisory Board, Decision Analyst, Inc. p. 89
Mindfield Physician Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Readers Panels, Signet Research, Inc. p. 102
SurveySavvy, Luth Research p. 96
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels - Western Europe, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
www.planet-pulse.com, Pulse Group p. 99
Your2Cents Business-2-Business, GENESYS Sampling Systems p. 92
Your2Cents Business-2-Business, Your2Cents Online Opinion Panel p. 104
Your2Cents Physicians/Health Care Prof., GENESYS Sampling Systems p. 92
Your2Cents Physicians/Health Care Prof., Your2Cents Online Opinion Panel p. 104

Educators

Consumer Directions, KL Communications, Inc. p. 94
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
GMI Business Panel, GMI (Global Market Insite, Inc.) p. 92
National Database - USA, Shifrin-Hayworth p. 102
Readers Panels, Signet Research, Inc. p. 102
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104

Synovate Global Opinion Panels - Western Europe, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
www.planet-pulse.com, PulseGroup p. 99
Your2Cents Business-2-Business, GENESYS Sampling Systems p. 92
Your2Cents Business-2-Business, Your2Cents Online Opinion Panel p. 104

Employees

Affordable Samples Online Business Panel, Affordable Samples, Inc. p. 86
AMR Interactive Consumer Panel, AMR Interactive p. 86
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Employee Satisfaction, Consumer Link p. 88
Consumer Link ProductTesting Research, Consumer Link p. 88
CountryPanel Denmark, Zapera.com A/S p. 104
CountryPanel Estonia, Zapera.com A/S p. 104
CountryPanel Finland, Zapera.com A/S p. 104
CountryPanel Norway, Zapera.com A/S p. 104
CountryPanel Sweden, Zapera.com A/S p. 104
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
eVox, Opinion Search Inc. p. 98
GMI Business Panel, GMI (Global Market Insite, Inc.) p. 92
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
National Database - USA, Shifrin-Hayworth p. 102
Readers Panels, Signet Research, Inc. p. 102
SpectraCom Research Panel, SpectraCom, Inc. p. 102
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels - Western Europe, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Synovate Voice of the Hispanic Family, Synovate p. 104
The Buzz, Market Equity p. 96
www.planet-pulse.com, PulseGroup p. 99
Your2Cents Business-2-Business, GENESYS Sampling Systems p. 92
Your2Cents Business-2-Business, Your2Cents Online Opinion Panel p. 104
Your2Cents Cellphone Survey Panel, GENESYS Sampling Systems p. 92
Your2Cents Cellphone Survey Panel, Mobile Memoir, LLC p. 96
Your2Cents Cellphone Survey Panel, Your2Cents Online Opinion Panel p. 104
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

Entrepreneurs/Small Business

Affordable Samples Online Business Panel, Affordable Samples, Inc. p. 86
Business ePanel, Survey.com p. 102
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Employee Satisfaction, Consumer Link p. 88
Consumer Link ProductTesting Research, Consumer Link p. 88
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
Esearch Business/IT Panel, Esearch.com, Inc. p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
Executive Advisory Board, Decision Analyst, Inc. p. 89
GMI Business Panel, GMI (Global Market Insite, Inc.) p. 92
National Database - USA, Shifrin-Hayworth p. 102
Readers Panels, Signet Research, Inc. p. 102
Small & Medium Business, Opinion Search Inc. p. 98
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
www.planet-pulse.com, PulseGroup p. 99
Your2Cents Business-2-Business, GENESYS Sampling Systems p. 92
Your2Cents Business-2-Business, Your2Cents Online Opinion Panel p. 104
Your2Cents Cellphone Survey Panel, GENESYS Sampling Systems p. 92
Your2Cents Cellphone Survey Panel, Mobile Memoir, LLC p. 96
Your2Cents Cellphone Survey Panel, Your2Cents Online Opinion Panel p. 104
Your2Cents Small Business Owners, GENESYS Sampling Systems p. 92
Your2Cents Small Business Owners, Your2Cents Online Opinion Panel p. 104

Executives/Management

Affordable Samples Online Business Panel, Affordable Samples, Inc. p. 86
AMR Interactive Small/Medium Business Panel, AMR Interactive p. 86
Berenhaus B2B Panels, Berenhaus Research Solutions, LLC p. 86
Business ePanel, Survey.com p. 102
C-Level Executive ePanel, Survey.com p. 102
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Employee Satisfaction, Consumer Link p. 88
CountryPanel Denmark, Zapera.com A/S p. 104
CountryPanel Estonia, Zapera.com A/S p. 104
CountryPanel Finland, Zapera.com A/S p. 104
CountryPanel Norway, Zapera.com A/S p. 104
CountryPanel Sweden, Zapera.com A/S p. 104
Cross-Tab Panel of IT Professionals, Cross-Tab Marketing Services Pvt. Ltd. p. 88
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
Esearch Business/IT Panel, Esearch.com, Inc. p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
eVox, Opinion Search Inc. p. 98
Executive Advisory Board, Decision Analyst, Inc. p. 89
Fortunecouncil.com, Resource Systems Group, Inc. p. 100
GMI Business Panel, GMI (Global Market Insite, Inc.) p. 92
Greenfield Online B2B/IT Panel, Greenfield Online p. 92
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
IT Decision Maker ePanel, Survey.com p. 102
National Database - USA, Shifrin-Hayworth p. 102
Online eVAL, National Market Measures, Inc. p. 96
Persuadable Research Panel, Persuadable Research Corporation p. 99
Readers Panels, Signet Research, Inc. p. 102
Small & Medium Business, Opinion Search Inc. p. 98
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Technology Advisory Board, Decision Analyst, Inc. p. 89
The Buzz, Market Equity p. 96
US Financial Decision Makers, Consumer Contact p. 88
www.planet-pulse.com, Pulse Group p. 99
Your2Cents Business-2-Business, GENESYS Sampling Systems p. 92
Your2Cents Business-2-Business, Your2Cents Online Opinion Panel p. 104
Your2Cents Business-2-Business, Your2Cents Online Opinion Panel p. 104

Gay & Lesbian

American Consumer Opinion®, Decision Analyst, Inc. p. 89
Consumer Directions, KL Communications, Inc. p. 94
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 92
Harris Interactive Gay, Lesbian & Bisexual, Harris Interactive® p. 92
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Mothers - Children & Teen Panel, Mindfield Online Panels p. 96
Mindfield Pet Owner Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
Readers Panels, Signet Research, Inc. p. 102
Surveyspot.com (USA), Survey Sampling International p. 102

Hispanic

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 86
American Consumer Opinion®, Decision Analyst, Inc. p. 89
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Concept Development, Consumer Link p. 88
Consumer Link Consumer Research, Consumer Link p. 88
Consumer Link Customer Satisfaction, Consumer Link p. 88
Consumer Link Ethnographic Research, Consumer Link p. 88
Consumer Link Focus Groups, Consumer Link p. 88
Consumer Link Home Use Tests, Consumer Link p. 88
Consumer Link Product Testing Research, Consumer Link p. 88
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
Dataintelligence ONLINE, Datatelligence Online p. 88
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 92
GMI Hispanic Panel, GMI (Global Market Insite, Inc.) p. 92
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
Ipsos U.S. Hispanic Panel, Ipsos North America p. 94
LatinoEyes.com, C&R Research Services, Inc. p. 86
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Mothers - Children & Teen Panel, Mindfield Online Panels p. 96
Mindfield Pet Owner Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Opinion Place, DMS Research p. 89
ORANJ BOWL, New Jersey Institute for Successful Aging Research p. 98
Readers Panels, Signet Research, Inc. p. 102

ReRez Hispanics Panel, ReRez p. 100
SmartPanel of Hispanics, FGI Research p. 90
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Synovate Voice of the Hispanic Family, Synovate p. 104
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

IT Professionals

Amplitude Research Technology Panel, Amplitude Research, Inc. p. 86
Cross-Tab Panel of IT Professionals, Cross-Tab Marketing Services Pvt. Ltd. p. 88
Esearch Business/IT Panel, Esearch.com, Inc. p. 90
GMI IT Panel, GMI (Global Market Insite, Inc.) p. 92
Harris Interactive Technology Decision Makers, Harris Interactive® p. 92
IT Decision Maker ePanel, Survey.com p. 102
Osterman Research Panel, Osterman Research, Inc. p. 98
ReRez B2B Panel, ReRez p. 100
RONIN IT Panel, RONIN Focus p. 102
Technology Advisory Board, Decision Analyst, Inc. p. 89
TechTarget IT Research Panel, TechTarget, Inc. p. 104
Your2Cents IT Prof./Tech. Users/Dec.n Makers, GENESYS Sampling Systems p. 92
Your2Cents IT Prof./Tech. Users/Dec. Makers, Your2Cents Online Opinion Panel p. 104

Lawyers

Consumer Directions, KL Communications, Inc. p. 94
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
GMI Business Panel, GMI (Global Market Insite, Inc.) p. 92
National Database - USA, Shifrin-Hayworth p. 102
Readers Panels, Signet Research, Inc. p. 102
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels - Western Europe, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Your2Cents Business-2-Business, GENESYS Sampling Systems p. 92
Your2Cents Business-2-Business, Your2Cents Online Opinion Panel p. 104

Middle-Eastern

American Consumer Opinion ®, Decision Analyst, Inc. p. 89
Consumer Directions, KL Communications, Inc. p. 94
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aids Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Mothers - Children & Teen Panel, Mindfield Online Panels p. 96
Mindfield Pet Owner Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Readers Panels, Signet Research, Inc. p. 102
Synovate Automotive Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

Mothers

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 86
American Consumer Opinion ®, Decision Analyst, Inc. p. 89
AMR Interactive Consumer Panel, AMR Interactive p. 86
Berenhaus Consumer Panels, Berenhaus Research Solutions, LLC p. 86
Canadian Consumer Panel, Consumer Contact p. 88
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Concept Development, Consumer Link p. 88
Consumer Link Consumer Research, Consumer Link p. 88
Consumer Link Customer Satisfaction, Consumer Link p. 88
Consumer Link Ethnographic Research, Consumer Link p. 88
Consumer Link Focus Groups, Consumer Link p. 88
Consumer Link Home Use Tests, Consumer Link p. 88
Consumer Link Product Testing Research, Consumer Link p. 88
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
Country Panel Denmark, Zapera.com A/S p. 104
Country Panel Estonia, Zapera.com A/S p. 104
Country Panel Finland, Zapera.com A/S p. 104
Country Panel Norway, Zapera.com A/S p. 104
Country Panel Sweden, Zapera.com A/S p. 104
Dataintelligence ONLINE, Datatelligence Online p. 88
DRI Consumer Panel, Digital Research, Inc. p. 89
E-Poll Consumer Panel, E-Poll p. 90
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
Esearch Children/Teens Panel, Esearch.com, Inc. p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
eVox, Opinion Search Inc. p. 98
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 92
Greenfield Online Moms & Babies Panel, Greenfield Online p. 92
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
KidzEyes.com, C&R Research Services, Inc. p. 86
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aids Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Mothers - Children & Teen Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
Momconnection.com, Resource Systems Group, Inc. p. 100
Momnibus, C&R Research Services, Inc. p. 86
Mums Opinion - Online Mother Panel, Research Now p. 100
National Database - USA, Shifrin-Hayworth p. 102
Opinion Place, DMS Research p. 89
Readers Panels, Signet Research, Inc. p. 102
ReRez Consumer Panel, ReRez p. 100
SmartPanel for Growing Families, FGI Research p. 90
SpectraCom Research Panel, SpectraCom, Inc. p. 102
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Synovate Voice of the Hispanic Family, Synovate p. 104
TeensEyes.com, C&R Research Services, Inc. p. 86
The Buzz, Market Equity p. 96
www.planet-pulse.com, Pulse Group p. 99
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

Mothers-Expectant

American Consumer Opinion ®, Decision Analyst, Inc. p. 89
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Concept Development, Consumer Link p. 88
Consumer Link Consumer Research, Consumer Link p. 88
Consumer Link Customer Satisfaction, Consumer Link p. 88
Consumer Link Ethnographic Research, Consumer Link p. 88
Consumer Link Focus Groups, Consumer Link p. 88
Consumer Link Home Use Tests, Consumer Link p. 88
Consumer Link Product Testing Research, Consumer Link p. 88
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
Country Panel Denmark, Zapera.com A/S p. 104
Country Panel Estonia, Zapera.com A/S p. 104
Country Panel Finland, Zapera.com A/S p. 104
Country Panel Norway, Zapera.com A/S p. 104
Country Panel Sweden, Zapera.com A/S p. 104
Dataintelligence ONLINE, Datatelligence Online p. 88
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
Greenfield Online Moms & Babies Panel, Greenfield Online p. 92
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aids Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Mothers - Children & Teen Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
Mums Opinion - Online Mother Panel, Research Now p. 100
Opinion Place, DMS Research p. 89
Readers Panels, Signet Research, Inc. p. 102
SmartPanel for Growing Families, FGI Research p. 90
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Synovate Voice of the Hispanic Family, Synovate p. 104
The Buzz, Market Equity p. 96
www.planet-pulse.com, Pulse Group p. 99
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

Native American

American Consumer Opinion®, Decision Analyst, Inc. p. 89
Consumer Directions, KL Communications, Inc. p. 94
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aids Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Mothers - Children & Teen Panel, Mindfield Online Panels p. 96
Mindfield Pet Owner Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Readers Panels, Signet Research, Inc. p. 102
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

Nurses

All Global Online, all global p. 86
Anaesthetists & Critical Care Nurses Panel, Creative Marketing & Research p. 88
Berenhaus B2B Panels, Berenhaus Research Solutions, LLC p. 86
Consumer Directions, KL Communications, Inc. p. 94
Consumer Research RX, Consumer Research Centre Ltd. p. 88
Diabetes Nurse Educators/CDE's Panel, Creative Marketing & Research p. 88
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
GMI Medical Panel, GMI (Global Market Insite, Inc.) p. 92
Greenfield Online Physicians Panel, Greenfield Online p. 92
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
JRA Healthcare Professionals Panel, JRA: Global Healthcare Rsch. Svces (Br.) p. 94
Medical Advisory Board, Decision Analyst, Inc. p. 89
Mindfield Physician Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Nurses Consulting Network, Caduceus Marketing Research p. 86
Readers Panels, Signet Research, Inc. p. 102
RONIN Pharma Panel, RONIN Focus p. 102
Specialist Respiratory Nurses Panel, Creative Marketing & Research p. 88
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Your2Cents Business-2-Business, Your2Cents Online Opinion Panel p. 104
Your2Cents Physicians/Health Care Prof.s, GENESYS Sampling Systems p. 92
Your2Cents Physicians/Health Care Prof., Your2Cents Online Opinion Panel p. 104

Parents

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 86
American Consumer Opinion®, Decision Analyst, Inc. p. 89
AMR Interactive Consumer Panel, AMR Interactive p. 86
Berenhaus Consumer Panels, Berenhaus Research Solutions, LLC p. 86
Canadian Consumer Panel, Consumer Contact p. 88
Childresearch.com Panel, ChildResearch.com p. 86
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Concept Development, Consumer Link p. 88
Consumer Link Consumer Research, Consumer Link p. 88
Consumer Link Customer Satisfaction, Consumer Link p. 88
Consumer Link Ethnographic Research, Consumer Link p. 88
Consumer Link Focus Groups, Consumer Link p. 88
Consumer Link Home Use Tests, Consumer Link p. 88
Consumer Link Product Testing Research, Consumer Link p. 88
Country Panel Denmark, Zapera.com A/S p. 104
Country Panel Estonia, Zapera.com A/S p. 104
Country Panel Finland, Zapera.com A/S p. 104
Country Panel Norway, Zapera.com A/S p. 104
Country Panel Sweden, Zapera.com A/S p. 104
Dataintelligence ONLINE, Datatelligence Online p. 88
DRI Consumer Panel, Digital Research, Inc. p. 89
E-Poll Consumer Panel, E-Poll p. 90
Esearch Children/Teens Panel, Esearch.com, Inc. p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
eVox, Opinion Search Inc. p. 98
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 92
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
KidzEyes.com, C&R Research Services, Inc. p. 86
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aids Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Mothers - Children & Teen Panel, Mindfield Online Panels p. 96
Mindfield Pet Owner Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Opinion Place, DMS Research p. 89
Readers Panels, Signet Research, Inc. p. 102
Smart Panel for Growing Families, FGI Research p. 90
SpectraCom Research Panel, SpectraCom, Inc. p. 102
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
TeensEyes.com, C&R Research Services, Inc. p. 86
www.planet-pulse.com, Pulse Group p. 99
Your2Cents Cellphone Survey Panel, GENESYS Sampling Systems p. 92
Your2Cents Cellphone Survey Panel, Mobile Memoir, LLC p. 96
Your2Cents Cellphone Survey Panel, Your2Cents Online Opinion Panel p. 104
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

Pharmacists

All Global Online, all global p. 86
Berenhaus B2B Panels, Berenhaus Research Solutions, LLC p. 86
Consumer Directions, KL Communications, Inc. p. 94
Consumer Research RX, Consumer Research Centre Ltd. p. 88
GMI Medical Panel, GMI (Global Market Insite, Inc.) p. 92
Greenfield Online Physicians Panel, Greenfield Online p. 92
JRA Healthcare Professionals Panel, JRA: Global Healthcare Rsch. Svces.(Br.) p. 94
Medical Advisory Board, Decision Analyst, Inc. p. 89
Mindfield Physician Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Pharmacists Consulting Network, Caduceus Marketing Research p. 86
Pharmacists Panel, Creative Marketing & Research p. 88
Readers Panels, Signet Research, Inc. p. 102
RONIN Pharma Panel, RONIN Focus p. 102
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels - Western Europe, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Your2Cents Business-2-Business, GENESYS Sampling Systems p. 92
Your2Cents Business-2-Business, Your2Cents Online Opinion Panel p. 104
Your2Cents Physicians/Health Care Prof., GENESYS Sampling Systems p. 92
Your2Cents Physicians/Health Care Prof., Your2Cents Online Opinion Panel p. 104

Physicians

All Global Online, all global p. 86
Berenhaus B2B Panels, Berenhaus Research Solutions, LLC p. 86
Consumer Directions, KL Communications, Inc. p. 94
Consumer Research RX, Consumer Research Centre Ltd. p. 88
DoctorDirectory.com Physician Panel, DoctorDirectory.com, Inc. p. 90
e-Rewards B2B Panel, e-Rewards Inc./ERI Research p. 90
e-Rewards Consumer Panel, e-Rewards Inc./ERI Research p. 90
GMI Medical Panel, GMI (Global Market Insite, Inc.) p. 92
Greenfield Online Physicians Panel, Greenfield Online p. 92
Harris Interactive Physician Panel, Harris Interactive® p. 92
Health Insights™, Market Insight, Inc. p. 96
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
JRA Physicians Panel, JRA: Global Healthcare Research Services (Br.) p. 94
MediTrend: Physician Panel, Untiedt Research GmbH p. 104
Mindfield Physician Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Physician's Advisory Council, Decision Analyst, Inc. p. 89
Physicians Consulting Network, Caduceus Marketing Research p. 86
Postal Pharmacare, NovaTest p. 98
Readers Panels, Signet Research, Inc. p. 102
ReRez Physicians Panel, ReRez p. 100
RONIN Pharma Panel, RONIN Focus p. 102
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels - Western Europe, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
WorldOne's Global Physician Panel, WorldOne Research p. 104
Your2Cents Business-2-Business, GENESYS Sampling Systems p. 92
Your2Cents Business-2-Business, Your2Cents Online Opinion Panel p. 104
Your2Cents Physicians/Health Care Prof., GENESYS Sampling Systems p. 92
Your2Cents Physicians/Health Care Prof., Your2Cents Online Opinion Panel p. 104

Proprietary Panel Management Services

(Client specific panels)
Amplitude Research, Inc., p. 86
AMR Interactive, p. 86
ARCS® IVR Systems, p. 86
Caduceus Marketing Research, p. 86
Ciao GmbH, p. 88
Circle 1 Network, p. 88
Consumer Contact, p. 88
Consumer Link, p. 88
Consumer Research Centre Ltd., p. 88
Cross-Tab Marketing Services Pvt. Ltd., p. 88
Decision Analyst, Inc., p. 89
Decision Insight, Inc., p. 89
Digital Research, Inc., p. 89
DoctorDirectory.com, Inc., p. 90
DrugVoice LLC, p. 90
E-Poll, p. 90
e-Rewards Inc./ERI Research, p. 90
Esearch.com, Inc., p. 90
FGI Research, p. 90
GENESYS Sampling Systems, p. 92
GMI (Global Market Insite, Inc.), p. 92
Greenfield Online, p. 92
Harris Interactive®, p. 92
Informa Research Services, Inc., p. 94
KL Communications, Inc., p. 94
Market Insight, Inc., p. 96
Market Reader Pro, p. 96
Marketing Leverage, Inc., p. 96
Marketing Solutions Corporation, p. 96
Mars Research, p. 96
MediaTransfer AG Netresearch & Consulting, p. 96
MI3 Market Intelligence Services, p. 96
Mindfield Online Internet Panels, p. 96
Mobile Memoir, LLC, p. 96
NJW Research, p. 98
The Olson Research Group, Inc., p. 98
Opinion Search Inc., p. 98
The People Panel, p. 99
Persuadable Research Corporation, p. 99
Pulse Group, p. 99
ReRez, p. 100
Resource Systems Group, Inc., p. 100
RONIN Focus, p. 102
Sample Czar, Inc., p. 102
Shifrin-Hayworth, p. 102
Signet Research, Inc., p. 102
SpectraCom, Inc., p. 102
Survey Sampling International, p. 102
Survey.com, p. 102
Synovate, p. 104
Team Vier b.v., p. 104
TechTarget, Inc., p. 104
Think Virtual Fieldwork, p. 104
Virtual Surveys Ltd., p. 104
Vision Critical, p. 104
Your2Cents Online Opinion Panel, p. 104
Zapera.com A/S, p. 104

Seniors/Mature/Elderly

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 86
American Consumer Opinion ®, Decision Analyst, Inc. p. 89
AMR Interactive Consumer Panel, AMR Interactive p. 86
Berenhaus Consumer Panels, Berenhaus Research Solutions, LLC p. 86
Boomers & Their Elders, Strategic Directions Group, Inc. p. 102
Canadian Consumer Panel, Consumer Contact p. 88
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Concept Development, Consumer Link p. 88
Consumer Link Consumer Research, Consumer Link p. 88
Consumer Link Customer Satisfaction, Consumer Link p. 88
Consumer Link Ethnographic Research, Consumer Link p. 88
Consumer Link Focus Groups, Consumer Link p. 88
Consumer Link Home Use Tests, Consumer Link p. 88
Consumer Link Product Testing Research, Consumer Link p. 88
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
Country Panel Denmark, Zapera.com A/S p. 104
Country Panel Estonia, Zapera.com A/S p. 104
Country Panel Finland, Zapera.com A/S p. 104
Country Panel Norway, Zapera.com A/S p. 104
Country Panel Sweden, Zapera.com A/S p. 104
Dataintelligence ONLINE, Datatelligence Online p. 88
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
eVox, Opinion Search Inc. p. 98
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aids Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Pet Owner Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Opinion Place, DMS Research p. 89
ORANJ BOWL, New Jersey Institute for Successful Aging Research p. 98
Readers Panels, Signet Research, Inc. p. 102
ReRez Consumer Panel, ReRez p. 100
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels - Western Europe, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel, Synovate p. 104
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Synovate Voice of the Hispanic Family, Synovate p. 104
The Buzz, Market Equity p. 96
www.planet-pulse.com, Pulse Group p. 99
Your2Cents Online Opinion Panel, GENESYS Sampling Systems p. 92
Your2Cents Online Opinion Panel, Your2Cents Online Opinion Panel p. 104

Teens

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 86
American Consumer Opinion ®, Decision Analyst, Inc. p. 89
AMR Interactive Consumer Panel, AMR Interactive p. 86
Berenhaus Consumer Panels, Berenhaus Research Solutions, LLC p. 86
Canadian Consumer Panel, Consumer Contact p. 88
Childresearch.com Panel, ChildResearch.com p. 86
Consumer Directions, KL Communications, Inc. p. 94
Consumer Link Concept Development, Consumer Link p. 88
Consumer Link Consumer Research, Consumer Link p. 88
Consumer Link Customer Satisfaction, Consumer Link p. 88
Consumer Link Ethnographic Research, Consumer Link p. 88
Consumer Link Focus Groups, Consumer Link p. 88
Consumer Link Home Use Tests, Consumer Link p. 88
Consumer Link Mystery Shopping, Consumer Link p. 88
Consumer Link Product Testing Research, Consumer Link p. 88
Consumer Research Panel, Consumer Research Centre Ltd. p. 88
Country Panel Denmark, Zapera.com A/S p. 104
Country Panel Estonia, Zapera.com A/S p. 104
Country Panel Finland, Zapera.com A/S p. 104
Country Panel Norway, Zapera.com A/S p. 104
Country Panel Sweden, Zapera.com A/S p. 104
Dataintelligence ONLINE, Datatelligence Online p. 88
E-Poll Consumer Panel, E-Poll p. 90
Esearch Children/Teens Panel, Esearch.com, Inc. p. 90
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 90
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 92
GMI Teen Panel, GMI (Global Market Insite, Inc.) p. 92
Greenfield Online Teen Panel, Greenfield Online p. 92
Informa Rsch. Svcs. Shopper/Consumer Panel, Informa Research Services, Inc. p. 94
Kidscom Club, Circle 1 Network p. 88
KidzEyes.com, C&R Research Services, Inc. p. 86
Mindfield Electronics & Entertainment Panel, Mindfield Online Panels p. 96
Mindfield General Consumer Panel, Mindfield Online Panels p. 96
Mindfield Grocery Brands Panel, Mindfield Online Panels p. 96
Mindfield Health & Beauty Aids Brand Panel, Mindfield Online Panels p. 96
Mindfield Homeowner & Lawncare Panel, Mindfield Online Panels p. 96
Mindfield Pet Owner Panel, Mindfield Online Panels p. 96
Mindfield Travel & Leisure Panel, Mindfield Online Panels p. 96
Mindfield Vision Care Panel, Mindfield Online Panels p. 96
National Database - USA, Shifrin-Hayworth p. 102
Opinion Place, DMS Research p. 89
Opinion8d - Online Teen Panel, Research Now p. 100
Readers Panels, Signet Research, Inc. p. 102
ReRez Consumer Panel, ReRez p. 100
SurveySavvy, Luth Research p. 96
Surveyspot.com (USA), Survey Sampling International p. 102
SurveySpree, DMS Research p. 89
Synovate Automotive Panel, Synovate p. 104
Synovate Financial Panel, Synovate p. 104
Synovate Global Opinion Panels-North America, Synovate p. 104
Synovate Health Conditions Panel
Synovate Technology Panel, Synovate p. 104
Synovate Travel & Leisure Panel, Synovate p. 104
Synovate Voice of the Hispanic Family, Synovate p. 104
Teen Insight™, Decision Insight, Inc. p. 89
TeensEyes.com, C&R Research Services, Inc. p. 86
The People Panel - Consumer Panel, The People Panel p. 99
www.planet-pulse.com, Pulse Group p. 99
Your2Cents4Teens, GENESYS Sampling Systems p. 92
Your2Cents4Teens, Your2Cents Online Opinion Panel p. 104
Youth ePanel, Survey.com p. 102

index of advertisers

AccuData Market Research, Inc. 81
Ph. 800-831-7744 | www.accudata.net

ActiveGroup 19
Ph. 800-793-3126 | www.activegroup.net

Advanced Focus 75
Ph. 212-217-2000 | www.advancedfocus.com

Affordable Samples, Inc. 26
Ph. 800-784-8016 | sales@affordablesamples.com

Analytical Group, Inc. 11
Ph. 800-946-2767 | www.analyticalgroup.com

ASDE Survey Sampler 73
Ph. 888-323-3651 | www.surveysampler.com

Baltimore Research .3
Ph. 410-583-9991 | www.baltimoreresearch.com

Behavioral Insights, LLC 39
Ph. 212-551-1411 | www.behavioralinsights.com

Burke Institute 67
Ph. 800-543-8635 | www.BurkeInstitute.com

Burke, Incorporated .18
Ph. 800-267-8052 | www.burke.com

CETRA, Inc. 34
Ph. 888-281-9673 | www.cetra.com

CMS Research 82
Ph. 419-843-8570 | www.cmsresearch.com

Common Knowledge Research Services 21
Ph. 800-710-9147 | www.commonknowledge.com

Consumer Opinion Services, Inc. 77
Ph. 206-241-6050 | www.cosvc.com

Cross-Tab Marketing Services Pvt. Ltd. 54
Ph. [91] 98210-38771 | www.cross-tab.com

Decipher, Inc. 55
Ph. 800-923-5523 | www.decipherinc.com

Decision Analyst, Inc. 87
Ph. 817-640-6166 | www.decisionanalyst.com

Decision Insight, Inc. 89
Ph. 816-221-0445 | www.decisioninsight.com

Delixus, Inc. 37
Ph. 925-672-2623 | www.delixus.com

Delve 15
Ph. 800-325-3338 | www.delve.com

DMS Research 63
Ph. 800-409-6262 | www.DMSdallas.com

EFG, Inc. 31
Ph. 866-334-6927 | www.efgresearch.com

e-Rewards Inc./ERI Research . . . . .Insert
Ph. 888-203-6254 | www.e-rewards.com

Esearch.com, Inc. 90
Ph. 310-265-4608 | www.esearch.com

ESOMAR 33
Ph. [31] (20) 664-2141 | www.esomar.org

Focus Pointe Global .17
Ph. 888-US-FOCUS | www.focuspointe.net

FocusVision VideoMarker, Inc. 69
Ph. 800-433-8128 | www.focusvision.com

FocusVision Worldwide, Inc. 13, 53
Ph. 800-433-8128 | www.focusvision.com

GENESYS Sampling Systems 65
Ph. 800-336-7674 | www.genesys-sampling.com

GMI (Global Market Insite, Inc) 7, 91
Ph. 206-315-9300 | www.gmi-mr.com

Greenfield Online 93
Ph. 866-899-1013 | www.greenfield.com

Group Dynamics in Focus, Inc. 28
Ph. 866-221-2038 | www.groupdynamics.com

i.think inc. 57
Ph. 214-855-3777 | www.ithinkinc.com

I/H/R Research Group 47
Ph. 800-254-0076 | www.ihr-research.com

Incheck, LLC 51
Ph. 303-296-9593 | www.incheckonline.com

InterClipper 41
Ph. 973-733-3434 | www.vicCD.com

JRA, J. Reckner Associates, Inc. 97
Ph. 215-822-6220 | www.reckner.com

Knowledge Networks, Inc. 95
Ph. 650-289-2000 | www.knowledgenetworks.com

Lieberman Research Worldwide 36
Ph. 310-553-0550 | www.lrwonline.com

Luth Research . . . . .Inside Back Cover
Ph. 800-465-5884 | www.luthresearch.com

Maritz Research 9
Ph. 887-4-MARITZ | www.maritzresearch.com

Marketing Evaluations, Inc. 99
Ph. 516-365-7979 | www.qscores.com/people.asp

The Marketing Workshop 23
Ph. 770-449-6767 | www.mwshop.com

McMillion Research Svce. . . . .Inside Front Cover
Ph. 800-969-9235 | www.mcmillionresearch.com

Microtab, Inc. 40
Ph. 770-664-9244 | www.microtab.com

MORPACE International, Inc. 27
Ph. 800-878-7223 | www.morpace.com

NameLab, Inc. 66
Ph. 415-517-0803 | www.namelab.com

New Age Media Systems, Inc. 78
Ph. 212-695-1590 | www.crosstab.com

NJW Research, Inc. .98
Ph. 845-471-7445 | www.njwresearch.com

On-Line Communications, Inc. 29, 79
Ph. 800-765-3200 | www.on-linecom.com

Opinion Search Inc. . . . . .Back Cover
Ph. 800-363-4229 | www.opinionsearch.com

PEARSON, S.A. de CV 32
Ph. [52] 55 553-15560 | www.pearson-research.com

Principles of Marketing Research 62
Ph. 706-542-6692 | www.principlesofmarketingresearch.org

Readex Research - The Mail Research Center 46
Ph. 800-873-2339 | www.b2bmrc.com

ReRez 100
Ph. 214-239-3939 | www.ReRez.com

The Research House Ltd. 45
Ph. [44] (20) 7935-4979 | www.meeting-house.co.uk

Research Now 101
Ph. [44] (20) 7091-7818 | www.researchnow.co.uk

S I S International Research, Inc. 49
Ph. 941-955-5744 | www.sisinternational.com

Sample Czar 103
Ph. 323-337-1155 | www.SampleCzar.com

Sawtooth Software, Inc. 22
Ph. 360-681-2300 | www.sawtoothsoftware.com

Schlesinger Associates, Inc. 5
Ph. 866-549-3500 | www.schlesingerassociates.com

Scientific Telephone Samples 43
Ph. 800-944-4STS | www.stssamples.com

Socratic Technologies, Inc. 42
Ph. 800-5-SOCRATIC | www.sotech.com

Survey Sampling International 61
Ph. 203-255-4200 | www.surveysampling.com

Vision Critical 58-59
Ph. 877-647-7255 | www.visioncritical.com

Western Wats - Headquarters 35
Ph. 801-373-7735 | www.westernwats.com

Your2Cents Online Opinion Panel 105
Ph. 800-336-7674 | www.your2cents.com

Trade Talk

continued from page 114

awards for completing surveys.They are younger and do a lot of surveys.

Given that respondents have so many reasons for completing surveys, Comley suggested that panel firms think about some kind of targeted incentive approach, which would give respondents micro-payments for each survey and other "softer" benefits tailored to their preferences. He said that using sweepstakes as the main motivator should be avoided, as research showed that many respondents doubt the prizes are ever awarded since they themselves have never won one of the larger prizes.The screening process should also be improved so that respondents who don't qualify learn their fate early and don't have to waste time answering several questions only to find out they don't meet survey guidelines.

The most interesting portion of Comley's presentation was his proposal for a common incentive scheme, under which panel firms would work together on a system that would monitor respondents (and perhaps reduce the number of surveys completed by the "professional" respondents) and also serve as a national register of those willing to take part in online surveys.This approach would reduce respondent acquisition costs (panel firms are paying repeatedly to recruit the same individuals on multiple panels) and also make it harder for people to join the same panel more than once.

Thought-provoking

De Jong and the rest of the conference organizers should be congratulated for assembling such a substantive and thought-provoking conference. After two days of listening to bright, inquisitive researchers explain and explore ways to make a part of their profession better, it's hard not to come away impressed and energized. If the rest of the industry puts the same care and commitment toward panel research as I witnessed in Budapest, the methodology should have a bright future indeed. | Q

Quirk's Marketing Research Review, (ISSN 08937451) is issued 11 times per year — Jan., Feb., Mar., Apr., May, June, July/Aug., Sep., Oct., Nov., Dec. — by Quirk Enterprises, Inc., 4662 Slater Road, Eagan, MN 55122. Mailing address: P.O. Box 22268, Saint Paul, MN 55122. Tel.: 952-224-1919; Fax: 952-224-1914; E-mail: info@quirks.com; Web address: www.quirks.com. Periodicals postage paid at Saint Paul, MN and additional mailing offices.

Subscription Information: U.S. annual rate (11 issues) $70; Canada and Mexico rate $100 (U.S. funds); international rate $119 (U.S. funds). U.S. single copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change. **POSTMASTER:** Please send change of address to QMRR, P.O. Box 22268, Saint Paul, MN 55122.

Quirk's Marketing Research Review is not responsible for claims made in advertisements.

Editorial policy: We invite submission of manuscripts from outside sources. Write or call for guidelines. Send press releases and other editorial material to Joseph Rydholm, editor (joe@quirks.com). We reserve the right to edit any manuscript.

Reprints: For information on article reprints, please contact FosteReprints at 866-879-9144 or at order@fostereprints.com or visit www.fostereprints.com.

By Joseph Rydholm, *Quirk's* editor

ESOMAR panel research conference shines

In one of the more enjoyable work-related trips I've taken recently, I traveled to Budapest this past April to attend an ESOMAR conference on panel research. Late last year we decided to add a directory of panel research providers and an accompanying editorial emphasis to our 2005 publication schedule. So I was happy to see that ESOMAR had added a panel research event to its always-solid conference lineup and doubly happy that it was in Budapest!

The chilly, rainy weather was perfect for conference-going but what I heard and saw over the two-day event was anything but gloomy. (The rain lifted later in the week and allowed my wife and I a few rewarding days of sightseeing in a fascinating city. If you've never been, you must go. Friendly people, a rich history, great public transportation and memorable food and drink - what more could you ask for?)

At over 200 people, attendance was about double what organizers had expected - testament no doubt to the ever-growing role of panels in the research process. With response rates to telephone research falling and Internet adoption rates climbing, panel research and other online approaches represent a golden opportunity for the industry. Presenters and attendees in Budapest repeatedly acknowledged this fact and there seemed to be a strong drive to get things right at the outset, establishing panel recruitment and management best practices to ensure the long-term health of the methodology.

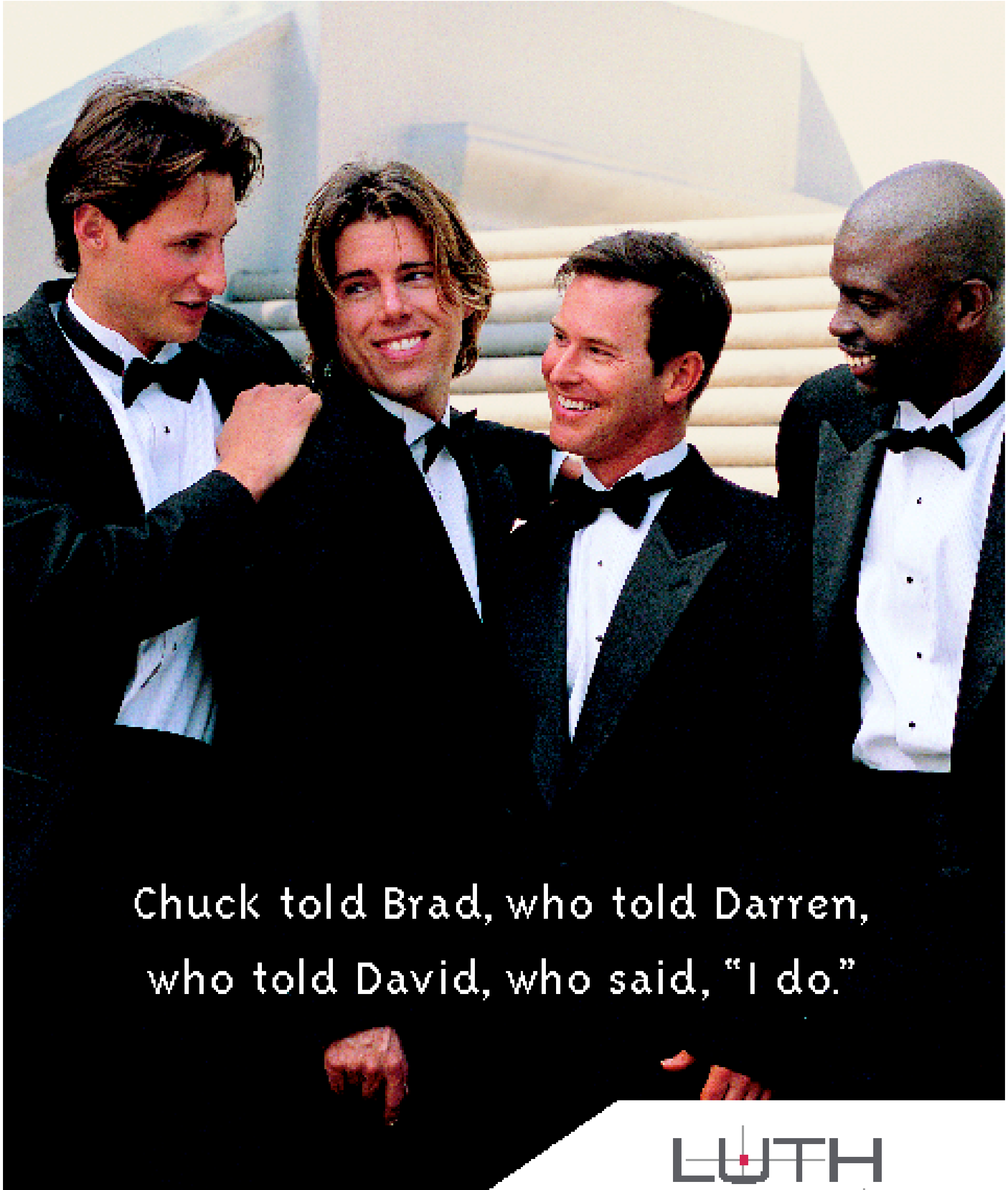
Kees de Jong, the event's program chairperson and CEO of Bloomerce Access Panels, set the tone with his opening remarks, raising a number of important points. Perhaps the most important was this: panels are people. While panel-building and maintenance require the delicate balancing of three factors - money, quality and resources (the respondents) - everything the industry does should take the respondents into consideration. Data quality is key, as is an efficient cost structure, but without respondents to take the surveys, nothing else matters.

The conference had good case history examples of companies using panels, including Hewlett-Packard, DHL, British Sky Broadcasting and General Mills. Jeff Hunter, director of consumer insights for General Mills, spoke from the client's perspective on the evolution of panel research. The food-products maker has long used mail panels but has gradually moved to the point where 80 to 85 percent of its panels are now online, Hunter said. Perhaps because of the speed and flexibility of online panels, Hunter said the firm does more strategic research now. The mix used to be one-third strategic and two-thirds tactical and now it's two-thirds strategic and one-third tactical.

Some lessons General Mills has learned: despite the Web's visual capabilities, packaging research is something best done in a store setting or at least offline; in an online panel, respondent tenure matters - research on research has shown that responses change over time; targeted proprietary panels - which function like online communities - show promise; many online panel members are members of multiple panels and more work needs to be done to gauge the impact of this fact, both on biases that may be introduced and on respondent fatigue.

Conference tracks included papers on the effects of new technologies, developing and keeping panelists, and panel management and quality issues. Pete Comley, chairman of U.K.-based Virtual Surveys, presented a research-on-research paper that examined findings from various studies on why people participate in research panels. He identified four respondent segments: helpers, opinionateds, professionals and the incentivized. Helpers, as the name suggests, enjoy doing surveys and will do them in many cases without payment. They skew older and enjoy being part of an online community. Opinionateds want their views to be heard and enjoy expressing their views. They will sometimes do surveys without compensation. The professionals are the most motivated by financial or other tangible rewards. They don't care as much about the survey topic. They skew male and tend to do the most surveys and work with multiple survey firms. The incentivized group is the most motivated by prizes and other

continued on page 113


Chuck told Brad, who told Darren,
who told David, who said, "I do."