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NOVEMBER 2006

Marketing Research Review

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in case you missed it...

news and notes on marketing and research



Hunger grows for organic baby food

Though it accounts for a fraction of the \$3.1 billion baby food market, sales of organic baby formula were up 19 percent from 2005, to \$6.6 million for the year ending August 12, according to ACNielsen figures reported in an October *Brandweek* article.

"Our research showed that when women are pregnant, they start looking at healthier lifestyles [and] are more open to organics," said Keri Butler, a spokeswoman at Similac, a division of Abbott Ross, Columbus, Ohio. Last February, Similac was the first national brand to launch an organic baby formula. Wal-Mart rolled out Parent's Choice this past summer. Organic food company Hain Celestial, Melville, N.Y., started shipping Earth's Best Infant Formula in October.

All three brands will have marketing support, and all are targeting a desirable demo, "Yoga Mommies," a term coined in a study from Packaged Facts, New York, last February on the U.S. infant product market. The study examined the lifestyles of affluent 20- and 30-something moms, and estimated they spent \$8 billion in 2005 on baby-related items, excluding food.

Similac launched marketing efforts with a major focus on its Web site, similacmomsalliance.com, and has signed six high-profile women, including Olympic gold medalist Summer Sanders, as spokesmoms.

"We knew we had to be relevant to their lifestyle - no TV for them," said Butler. "They make purchasing decisions more organically, through chats with peers, friends and family. The Web is central to that." The spokesmoms will each have a link at the Web site, sharing thoughts about motherhood.

Ads for Hain Celestial's Earth's Best state that its organic formula is "Patterned after breast milk," a nod to the medical community's preferred method of infant feeding. "Breast milk is the first choice for our infant's growth - but if you choose formula, you'll feel good knowing there's an organic choice," the ad copy says.

Wal-Mart was the first - and still the only - mass merchandiser to offer a store-brand organic baby formula. Wal-Mart, not surprisingly, is trying to outsell the competition with lower prices. Wal-Mart sells a 25.7-ounce can of Parent's Choice for less than \$20; Similac sells 12.9 ounces for about \$15.

While organic foods are hot right now, the jury is still out on organic baby formula as being a healthier option to traditional baby formula. "There is no scientific data showing any significant health advantage to buying organic," said Dr. Ari Brown, a representative for the American Academy of Pediatrics, Washington.

"Organic Baby Formula Segment Growing Fast," *Brandweek*, October 2, 2006



Sci Fi network tests pilot online

A July 22nd Wall Street Journal Online reported on the Sci Fi cable network's online testing of the pilot of an animated show. The show, *The Amazing Screw-On Head*, played on Sci Fi's Web site in the weeks before it aired on TV on July 27. Viewers were asked to fill out a survey about the show, a historical superhero adventure voiced by Paul Giamatti and David Hyde Pierce.

The network said the feedback would play a large role in whether it picked up the show as a full series. "We're asking a lot of the same questions we'd ask in a focus group," said Craig Engler, senior vice president of SciFi.com. "But instead of 10 people we can get tens of thousands of people."

This summer, the article noted, some shows took the *American Idol* voting formula to a new level: Asking Web surfers to weigh in on decisions usually made by executives, from casting choices to script input. These moves are surely promotional efforts to boost viewership but they also demonstrate a feature of the Internet that TV networks and Web companies are finding increasingly valuable: They can test concepts cheaply online and get instant feedback, without relying solely on Nielsen ratings.

"How to See a New Show Early - and Change It," Wall Street Journal Online, July 22, 2006

Survey invite wording invites trouble

A study by U.K.-based Lightspeed Research found that including the research topic in a survey invitation can increase the number of false responses in the survey.

As part of its "Research on Research" project the company investigated the influence of mentioning the actual topic of a survey in the invitation on the accuracy of the results. Respondents who were told about the topic were more likely to pretend to belong to the target group in order to receive the incentive. As part of the study they were asked to indicate which brands they knew and used. Fourteen percent of those who had been told the topic up front claimed to use brands that do not exist.

"Even the very beginning of any project, the invitation process, can significantly impact the quality of the data collected," said David Day, CEO Europe at Lightspeed Research. "Targeted invitations that provide subject matter and incentives for qualifying could cause respondents to take a survey just to receive the incentive, even if they know they do not qualify, which clearly could invalidate the entire research undertaken."

The study took a sample and divided it into two groups, demographically matched by age and gender. A non-targeted invite was sent to one group and explained that the survey would last about five minutes and respondents who completed it would win 10 entries for the monthly prize drawing. There was no mention of the questionnaire subject matter. The second group was sent a targeted invite clearly indicating that the study was looking for people who went fishing at least once a month and if they qualified and completed the survey they would receive a three-euro electronic gift voucher.

In both groups, those who met the qualifying criteria were then asked four questions regarding fishing rod brands. The list of brands was made up of 15 real brands and 10 non-existent brands. Among the group that had received the targeted invite 21 percent claimed to be aware of non-existent brands compared to 9 percent of the non-targeted group. A similar result was also shown when respondents were asked to list the brands they actually used. In the targeted invite group 14 percent of respondents claimed to use non-existent brands, compared to 5 percent of non-targeted respondents.



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Brother, can you spare a dime?

Americans continue to rank near the very top when it comes to being strapped for cash, according to a study by ACNielsen, Schaumburg, Ill., of consumers in 40 markets worldwide. Nearly one-quarter (22 percent) of U.S. respondents said that once they have covered their basic living expenses, they have no money left over. There is a bright spot: for



the first time since the study began in 2004, the U.S. has lost its usual top spot among countries whose consumers have no cash to spare.

The findings are from the ACNielsen Online Consumer Confidence Study, a twice-yearly global survey that gauges consumers' confidence in the economy, spending and saving patterns, and major concerns. This survey marks the fourth in the series; the first was conducted in October 2004.

The percentage of American consumers who say they have no spare cash remains the same from the last survey, conducted in November 2005, after dropping from 28 percent in the May 2005 survey.

The survey also showed that Americans say they tend to funnel what spare cash they do have into savings or debt relief, rather than new clothes or expensive technology pur-

Markets with Highest Percentage of Consumers Who Have No Spare Cash	
Market	Percentage with "No Spare Cash"(a)
Portugal	23%
United States	22%
Netherlands	17%
United Kingdom	17%
Canada	16%
France	16%
Turkey	16%
Hungary	15%
Korea	15%
Germany	15%
(a) Global Average=13%	

chases. Paying off debts was claimed as the top use of spare cash (41 percent), with putting money into savings close behind at 38 percent.

"While Americans are notorious for overspending and building debt, these findings show a desire for financial responsibility when it comes to discretionary income," says John J. Lewis, president and CEO, ACNielsen U.S. "Perhaps because the idea of living from paycheck to paycheck is so prevalent, consumers who have a little extra cash would rather use it to shore up their finances than spend it right away."

This attitude makes an impact when it comes to consumers' purchases of expensive items. Americans rank second from last when it comes to spending their extra cash on new technology, with only 17 percent say-

ing that's where their money goes. U.S. consumers also rank in the bottom 10 of all markets surveyed when it comes to spending spare cash on new clothes (26 percent) and vacations (25 percent).

"Clearly the cost of energy, particularly gasoline, and a slowing housing market are having a negative impact on the U.S. consumer's purchasing attitudes," says Lewis. "Whether this attitude will ever actually materialize in hard economic terms is yet to be seen."

The survey, which took place in June 2006 over the Internet, polled 21,779 respondents in 40 markets:

How Consumers Utilize Their Spare Cash		
Activity	U.S.	Global Average
Paying Off Debts/ Credit Cards/Loans	41%	32%
Putting into Savings	38%	40%
Out-of-Home Entertainment	28%	33%
Home Improvements/ Decorating	27%	25%
New Clothes	26%	31%
Holidays/Vacations	25%	34%
New Technology Investing in Stocks/	17%	24%
Mutual Funds	14%	16%
Contributing to Retirement Fund	13%	11%

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names of note

Veteran pollster **Warren Mitofsky** died September 1 in New York of an aortic aneurysm at age 71. Credited with inventing the election day exit poll, Mitofsky later developed with fellow researcher Joseph Waksberg a way to sample households by telephone to efficiently reach people with unlisted as well as listed phone numbers. The random digit dial method now is a survey research standard.

Early in his career Mitofsky worked for the U.S. Census Bureau, designing surveys that looked at poverty and other social concerns. He was executive director of CBS News election and survey unit from 1967 until 1990. When he joined CBS, political pollsters relied on house-to-house interviews to project winners of elections in the coming days.

Mitofsky developed the election projection and analysis system used by CBS News and later by a consortium of news organizations. He first conducted an exit poll in 1967 in a Kentucky governor's election for CBS News. He conducted the first national exit poll in 1972 and covered nearly 3,000 elections.

In 1976 he and editors at the *New York Times* established a polling collaboration that became a model for

other such partnerships. Mitofsky left CBS News in 1990 to head Voter Research and Surveys, the first network exit poll consortium.

As president and in other roles with the American Association for Public Opinion Research and the National Council of Public Polls, he led in setting survey research industry standards for best practices and disclosure and in reviewing polls' performance. In 1999 AAPOR gave him its lifetime achievement award for his "continuing concern for survey quality."

Since 2003, Mitofsky led the election-night analysis for the News Election Pool, providing exit poll results and election projections in the 2004 primaries and general election for the Associated Press and five TV networks.

Jim Robinson died in his home in Sioux Falls, S.D., on September 13 of cancer. Robinson created *Robinson & Muenster Associates*, a polling and consulting firm in Sioux Falls. An active member of CASRO, he served on the CASRO University Committee, as a CASRO board member, and as the leader of CASRO's Government & Public Affairs Committee.

Lawrence Perlman will retire as nonexecutive chairman of the board of directors and director of *Arbitron Inc.*, New York, in the spring of 2007, at the conclusion of his current term.

Cincinnati-based *Integrated Research Associates* has named **Jack T. Owens** vice president of client service. **Jack Thompson** has been named project manager.

Doug Skipper joined *Information Specialists Group Inc.*, Eden Prairie, Minn., as director of field services.

Kimberly White has been named director of client development at Edison, N.J., research firm *Schlesinger Associates*.

Monroe, Mich., furniture maker *La-Z-Boy Residential* has named **Tom Zwolan** to the newly created position of director of consumer research.

InsightExpress, Stamford, Conn., has named **Molly Hislop** director of market research, AdInsights. **David Katz** has been named director, strategic business development.

Olson Research Group Inc., Warminster, Pa., has named **Lynn Welsh** and **Paul Neal** principals of the company. Welsh oversees operations in the New Jersey office. Neal oversees operations in the Pennsylvania office.

Atlanta research firm *CMI* has named **Janet Patterson** and **Elaine Golding** account manager.



Patterson **Golding**

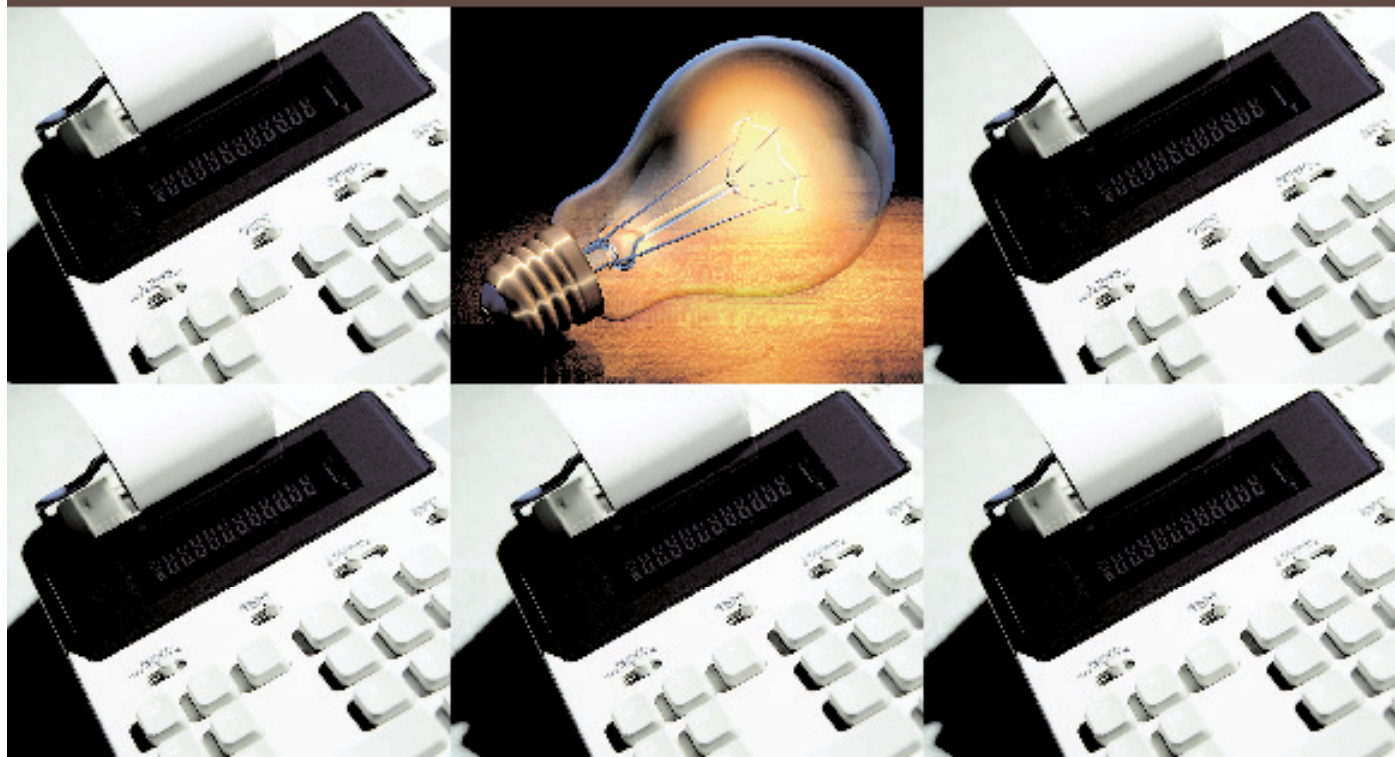
Seattle research firm *Global Market Insite Inc.* has named **Jake Sedlock** vice president of enterprise sales for North America and **Michael Allenson** vice president of syndicated research.

Andrea Mezzasalma has been appointed head of London researcher *TNS' Internet, Television and Radio Audience Measurement* sector. He will relocate from Milan to London.

Wendy McNutt has been named director of USA service delivery at the new San Francisco office of London-based *Research Now*. She is responsible for service delivery for both the San Francisco and New York offices. Also in the San Francisco office, **Tobin Bailey** has been named vice president of client development. In the New York office, **Frank Markowitz**

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Which of these research providers should you partner with?



Maybe you're torn between conflicting marketing concepts. Perhaps it's critical to understand customers who are hard to contact. Or possibly your product's destiny is riding on research outcomes, and you have only one chance to get it right.

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product and service update

Site gathers names of fraudulent online panelists

PureSample.com is an industry-wide initiative funded by Seattle-based Global Market Insite Inc. (GMI) to protect the credibility of online market research as a valid and reliable method of data collection.

PureSample.com is a public data repository of e-mail addresses associated with panelists exhibiting low-quality or fraudulent response data. It includes GMI's own database of fraudulent panelists' e-mail addresses, which have been detected via the company's countermeasures designed to combat online panel fraud.

Registered panel managers across the industry can now enter one or more e-mail addresses into the site's search engine and view each e-mail address' fraud score, as well as export a report. PureSample.com works like a credit bureau report for online panels, whereby any fraud score higher than 0 indicates that the panelist has already been reported. Panel managers can also file fraud reports for respondents with questionable credibility and search the database by e-mail addresses to determine if other panel managers have filed fraud reports against a list of their own respondents' e-mail addresses.

Some current features include: secure access via user login for filing panelists (score-checking does not

require login); filing of single or batched suspicious panelists; querying of single or batched suspicious panelists; weighting of each suspicious panelist per infraction; summary and detailed report responses.

Access is complimentary to any panel professional who wishes to add their list of fraudulent panelists to the PureSample database or assess their list of panelists against the PureSample database. For more information visit www.puresample.com.

TiVo, IRI partner to understand impact of DVRs

Alviso, Calif.-based TiVo Inc. and Information Resources Inc. (IRI), Chicago, have launched the IRI TiVo Consumer Insights Suite, comprising two new services, to help advertisers and brand marketers understand the impact digital video recorder (DVR) technology has on consumer viewing patterns and subsequent product sales, as well as to quantify the effectiveness of specific advertising campaigns and brand recognition programs in TiVo DVR households.

Additionally, the two firms are expanding their existing relationship. Utilizing second-by-second analysis and tracking it to actual consumer purchasing decisions, the expanded relationship provides viewer and consumer insights from a new national DVR research panel combined with

new media and message testing capabilities to understand the evolving impact of DVRs.

The IRI TiVo Consumer Pulse solution gives advertisers insights on the effect of DVR time-shifting behavior on sales through an opt-in panel of viewing participants throughout the U.S. The new solution identifies sales impact for individual products and brands, delivers insights on consumers being impacted, and provides information on the viewing behaviors that drive the impact. Using a national opt-in panel of TiVo homes, generic DVR homes and non-DVR homes, IRI measures brand purchases to deliver understanding of brand performance in DVR households and the impact of DVRs on product launches, brand extensions and established brands. TiVo then measures second-by-second commercial viewership in the homes with TiVo service, making it possible for brand purchase results to be traced and compared to the actual viewership of commercials.

Through the IRI BehaviorScan DVR solution, clients will be able to test specific advertising creative while simultaneously tracking the purchasing behavior of TiVo households and compare that with generic DVR and non-DVR households within the same market. Advertisers can benefit from the split-test environment by determining how to execute different advertising plans based on what is most actionable and relevant to their target audience. Advertisers and media buyers will also be able to experiment with media, mix and creative strategies. For more information visit <http://us.infores.com>.

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research industry news

News notes

A September 19, 2006, Associated Press story reported that an employee of a company that conducted campaign polls for President Bush, Sen. Joe Lieberman and other political candidates pleaded guilty to making up poll results. Darryl Hylton pleaded guilty before U.S. District Judge Janet C. Hall to one count of conspiracy to commit wire fraud. The company, Guilford, Conn.-based **DataUSA**, is now known as **Viewpoint USA**.

Hylton admitted that he conspired to falsify survey and polling results to meet deadlines or other requirements that DataUSA otherwise could not meet. He also admitted that he directed other DataUSA employees to falsify results in a variety of ways, including changing demographic information, such as gender, to satisfy client requirements.

Hylton faces up to five years in prison and a fine of up to \$250,000 when he is sentenced on Dec. 11.

His plea came two weeks after Tracy Costin, the company's owner, pleaded guilty to the same charge. As part of her plea agreement, Costin agreed to repay \$82,732 to unidentified clients for 11 jobs between June 2002 and May 2004.

According to a federal indictment, Costin told employees to alter poll data, and managers at the company told employees to "talk to cats and

dogs" when instructing them to fabricate the surveys.

Prosecutors say in some instances all survey answers were fabricated or surveys were completed after the respondent being interviewed had hung up the phone.

An FBI affidavit from 2004 in support of a search warrant quotes a supervisor of the company estimating that 50 percent of the data sent to Bush's campaign was falsified. FBI Special Agent Jeff Rovelli, who wrote the affidavit, said in an interview with the Associated Press that investigators were not able to verify the claim related to Bush because that data was not located and analyzed.

The company primarily did internal polls for candidates rather than the type widely quoted in the news media, authorities said.

Boston research firm **DiscoverWhy Inc.** has changed its name to **Reactions & Opinions Inc.**

M/A/R/C Research, Irving, Texas, has launched a research industry blog, authored by Merrill Dubrow, M/A/R/C president and CEO, at www.marcresearchblog.com.

The Media Rating Council has fully accredited New York-based **Scarborough Research's** core syn-

dicated services: the 75 Top-Tier Local Market Studies and the Multi-Market Study, beginning with the 2006 product year. The full accreditation status covers Scarborough's syndicated data collected via telephone, consumer booklet and television diary. Additionally, PRIME NEXT, Scarborough's proprietary data analysis software, has been fully accredited for the core syndicated services.

Acquisitions/transactions

Netherlands-based **VNU Group B.V.** has agreed to sell its 34.3 percent stake in **Solucient**, an Evanston, Ill., information products company serving the health care industry, to the Thomson Corporation, which is acquiring 100 percent of Solucient. Terms were not disclosed.

Media research firm **Outsell Inc.**, Burlingame, Calif., has acquired London-based media analysis firm **Electronic Publishing Services Ltd.** (EPS). David Worlock, founder and chairman of EPS, will serve as chief research fellow of the new organization. All members of the EPS team will be retained.

San Antonio-based marketing firm **Harte-Hanks Inc.** has acquired Boston tech research firm **AberdeenGroup Inc.** The boards of directors of both Harte-Hanks and AberdeenGroup have approved the transaction. Harte-Hanks AberdeenGroup offices and analysts will remain in Boston.

J.D. Power and Associates, Westlake Village, Calif., has acquired **Automotive Resources Asia** (ARA), a market strategy and information firm. Terms of the transaction were not disclosed. ARA maintains offices in Beijing, Shanghai and Bangkok.

Calendar of Events November-December

The Marketing Research Association will hold its annual fall education conference on November 8-10 at the Sheraton Wild Horse Pass Hotel, Scottsdale, Ariz. For more information visit www.mra-net.org.

IIR will hold its European market research event on November 13-16 at the Riverbank Park Plaza Hotel in London. For more information visit www.iirusa.com.

ESOMAR will hold a conference on panel research on November 27-29 at the Hotel Arts Barcelona, Barcelona, Spain. For more information visit www.esomar.org.

ESOMAR will hold a conference on researching the telecommunications industry on November 29-December 1 at the Hotel Arts Barcelona, Barcelona, Spain. For more information visit www.esomar.org.

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One-on-ones put the quality in qualitative

Although many people immediately think of focus groups when they think of qualitative research, there is another approach that may be better suited to delving deep into issues. In-depth one-on-one interviews, conducted through various media, offer greater value than focus groups, and their benefits should be considered whenever qualitative results are needed.

One-on-one interviews can uncover the best thinking of every respondent without the drawbacks of group dynamics. In a typical focus group, a few of the respondents do most of the talking. Even if an adept moderator can help smooth out this imbalance, it's difficult to prevent group-think bias as a result of a few individuals monopolizing the conversations.

With one-on-one interviews, good or bad ideas from one respondent do not influence the thoughts of any other respondent; this alone increases the quality of the information obtained. In-depth interviewing is also designed to elicit the whys behind respondents' reactions.

Skilled interviewers are trained to probe into people's thought processes to obtain a clearer understanding of exactly what respondents mean by their answers without leading them to a particular conclusion. This kind of probing is difficult - not to mention clumsy - to accomplish systematically for each participant of a focus group.

Twice the information

Researchers can obtain at least twice the amount of information per respondent in an in-depth interview than in a typical focus group. In a standard, eight-person, 90-minute focus group, there are nine people (eight participants plus moderator) sharing the floor. On average, therefore, each respondent is allotted 10 minutes of talk time across those 90 minutes (90 minutes divided by nine people).

The cost of a focus group of this type is about \$6,000. That number includes everything: recruiter, moderator, participant stipend, food, facility, report write-up and the cost of getting a few observers to the

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event. Divide 80 minutes of participant talk time (the moderator doesn't count) into the \$6,000 expense, and your cost per respondent minute in this case is \$75 (\$6,000/80).

However, if a typical in-depth interview runs 30 minutes and costs between \$400-\$500, (including recruiting, interviewing, participant stipend and reporting), the cost per respondent minute is in the range of \$16 to \$25. The big difference results from the amount of time the respondent spends talking, which is typically about 20 to 25 of those 30 minutes in an in-depth phone interview.

Thus, when considering the cost per respondent minute, in-depth interviews can provide much greater value.

Rich database

In-depth interviews capture all the



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relevance and salience of qualitative information of focus groups. Every word the respondent speaks can be taped, transcribed and used in multiple ways. Well-trained coders can go beyond surface answers and produce a rich database that generates analyst reports, identifies broad themes and produces a body of knowledge of the range and depth of reactions.

In-depth interviews allow a much more representative approach than a focus group setting. In fact, with the small number of focus group participants, it is even more important to carefully select the respondents so that they represent the marketplace as accurately as possible. Yet focus groups, by their very nature, are far more constrained by location and time than other media used for one-on-one interviews.

Often, the logistics of recruiting and running several focus groups in multiple locations unduly complicate and lengthen the research process. Enticing prospective participants out of their home or office to

a strange location is much more difficult, time-consuming and expensive than inviting them to take part in interesting conversational research over the phone. While it is often necessary to ply focus group participants with food and money in return for two hours of their time, these same participants will engage in a targeted 15-20-minute phone conversation often for no incentive whatsoever.

Optimally suited

One-on-one interviews are ideal when looking for detailed information on topics that people are unlikely to openly talk about in front of others or when testing concepts that may be difficult to understand and participants may not want to demonstrate ignorance in a public setting. When conducting research with the following audiences, for example, one-on-ones can offer advantages over focus groups:

- investors - when researching

financial products and services, survey participants are often reluctant to discuss their financial position in front of a group;

- executive/C-level individuals - often will not consider focus group participation and have limited time to devote to research;
- employees - are often reluctant to speak freely in front of co-workers and/or management observers.

More value

If the true goal of research is more insight from each respondent, then the value received from in-depth one-on-one interviews when compared to focus groups is significantly greater. One-on-one interviewing can double or triple the number of minutes that the respondent is talking. Further, the research investment is more cost-effective, since more of the research budget is used to elicit information from each and every respondent rather than for other incidental costs of hosting a focus group. | Q

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Statistical non-significance does not mean unimportant

Statistical testing is a standard practice in market research, with statistically significant findings routinely used to draw conclusions and guide business decisions. However, not all statistically significant results are meaningful. Statistical significance is guaranteed, given a large enough sample. Statistical non-significance does not necessarily mean “unimportant” as it may be an artifact of the small sample size. Thus, exclusive focus on statistical testing can lead to incorrect conclusions and poorly-informed business decisions.

As an illustration consider two companies that are testing if consumers’ interest in a new product is different across geographic regions. Company A has ample funding and is able to conduct a large-scale study. Company B has very limited funding and thus conducts a similar yet small-scale study. As a result, Company A obtains statistically significant differences across regions, while Company B does not. Based on the statistically significant findings, Company A concludes that there are important differences in

consumer interest and develops and launches regionally-specific products accordingly. Company B, on the other hand, concludes that there are no important regional variations in interest and launches the same product across regions.

Which company has made the right business decision? Unfortunately, statistical testing alone does not provide us the answer. What is needed is a way of knowing if the differences both companies found across regions are important and meaningful to business (and not just statistically significant). This is where the concepts of effect size and power are vital.

Magnitude of the difference

The effect size provides information on the magnitude of the difference between conditions. One straightforward way of obtaining an effect size is to compare the average of one condition to the average of another condition. For example, the implications are clear when we know that one advertisement results on average in 10 percent more sales

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than the other advertisement. However, the interpretation of the results is not always so straightforward. Consider a study with the goal of comparing how two products are liked by consumers. The study uses a 10-point scale, where 0 indicates extreme disliking and 10 indicates extreme liking. The results from the study show that one product is rated on average a 6 and the other product is rated on average a 7. Is this one-point difference in liking between the two products small or large and what is the impact of this difference on business?

Effect size indices go beyond comparing averages of different conditions. Many effect sizes are not dependent on a scale used in a study and thus results across studies using different scales can be compared. Effect sizes can usually be expressed in percentages from 0

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percent to 100 percent, with larger values indicating a more robust difference that is likely to have a substantial impact on business. Past research as well as linking effect size information with financial info (e.g., sales) will allow you to determine what effect size can be expected and the impact it will have on business.

Power is important

The focus of studies is usually on finding a significant difference, yet power is usually not considered. Power is very important as it is an indication of the probability of a study detecting a significant difference between conditions when the difference actually exists. Incorrectly concluding that different conditions (e.g., advertisements, products, regions) produce similar outcomes can be costly for business. Power ranges from 0 to 1, with values close to 1 indicating stronger power. Power is directly related to sample size, with larger sample size leading

to higher power. As a rule of thumb, it is advisable to have power of at least .80 to .90. Power over .90 is not necessary for most research.

The desired level of power and what constitutes a meaningful effect size should be agreed upon prior to any study as these two pieces of information determine the sample size needed for the study. Once the study is completed, effect size and power need to be calculated to validate a priori assumptions about power and effect size. Statistical packages make such computations available with the click of a button.

Cramer's V (for categorical data) and eta-squared (for continuous data) are among common and easy-to-interpret effect size indices. Cramer's V and eta-squared range from 0 to 1 with larger values indicating a stronger impact of the results on business. For easier interpretation, the values could be converted to percentages by multiplying them by 100. As an illustration, consider the study on product liking

discussed earlier. If eta-squared is equal to 2 percent, this would suggest that the one-point difference between the products (an average liking of 6 for one product and an average liking of 7 for another product) is not meaningful and unlikely to have business impact. Conversely, if eta-squared is found to be 30 percent, the business implication is that the one-point difference in product liking has a potential to impact the business and thus the product with a higher liking score should be selected for production.

Past research and knowledge of the research phenomena aid in determining what effect size can be expected and what impact it will have on business. As a rule of thumb, if a study investigates the relationship between attitudes and behavior, eta-squared below 20 percent is usually considered weak, while eta-squared above 50 percent represents a strong relationship.

Once the study is completed, power and effect size should be cal-

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Table 1		
	Small Effect Size	Large Effect Size
High Power	Cell 1 Evaluate if the difference between conditions will have meaningful impact on business	Cell 2 May be able to use a smaller sample size in future similar studies
Low Power	Cell 3 There are no meaningful differences between conditions	Cell 4 Increase sample size

culated and reported. They will help with interpretation of the results and aid in the design of future studies.

Table 1 provides suggestions based on the power and effect sizes found in a study. Cell 1 shows that if power is high but effect size is small, practical implications of the findings should be carefully considered. Cell 2 shows that if power is high and effect size is large, a smaller sample size should be considered for similar future studies. Cell 3, with small effect size and low power, demonstrates that there are no meaningful differences between

conditions. Finally, Cell 4 shows that if power is low but effect size is large, there may be meaningful findings but the sample size used in the study is too small and needs to be increased before any recommendations could be provided.

Not sufficient

To conclude, information from statistical significance testing is necessary but is not sufficient. Statistical significance does not provide information about the impact of the significant result on business. This should be evaluated using an effect

size index (e.g., eta-squared). Desired alpha levels, power and what constitutes a meaningful effect size should be considered prior to any study as they determine the sample size needed. Finally, power and effect size should be calculated and evaluated once the study is completed to evaluate pre-study assumptions and aid in interpretation of practical implications of the results. | Q

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Triple-S standard facilitates data exchange

Transferring survey research data between competing software packages has, until recently, been among the more time-consuming and costly tasks of the data processing professional. While software developers have ensured that their own products work well together, little attention has been paid to integrating these products with other software developed both inside and outside of the survey research industry. Given a number of recent trends and developments in information technology, this now poses less of a problem than it once did. Open standards, the expanding role of the Internet, and a desire to integrate data stores across the organization have all hastened the call for interoperability.

The most obvious and immediate need for integration is within the survey research industry itself. If a developer's Web or CATI data collection package can export directly to the software they developed to create crosstabulations, why would a prospective or existing client want

to look beyond this solution? Setting aside the developer's interest in keeping users under its own software umbrella, several good reasons can be offered: the merit of competing products under consideration, the ability of these products to be integrated with software outside the research industry and their cost vis-à-vis other alternatives. While export and import programs may have been written in certain situations, a more comprehensive solution was needed to allow these disparate products to interface with one another.

Fortunately, a solution now exists which allows competitive software products to exchange data with one another: the Triple-S standard. The U.K.-based Triple-S Group (www.triple-s.org) is a vendor-neutral organization which espouses open standards and is backed by the Association of Survey Computing (ASC). Defined as a "means of transferring the key elements of entire surveys between different survey software packages across various

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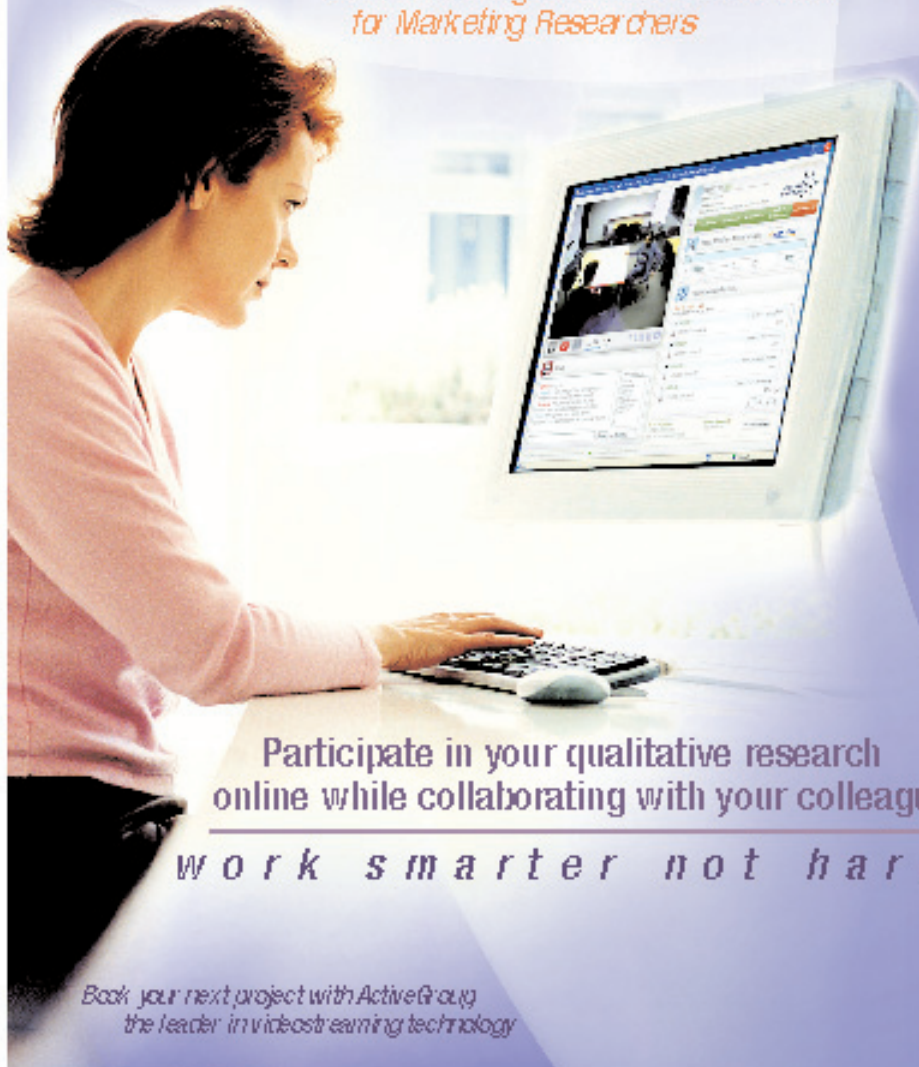
hardware and software platforms," the Triple-S standard has been adopted by over 50 companies worldwide that develop market research software. Implementers include well-known companies such as CfMC, Voxco, Global Market Insite (GMI) and Pulse Train. These implementers recognize the current trend towards allowing software to work together collaboratively. By design, it is relatively easy for software houses to write export and import programs to support the Triple-S standard. (The Triple-S specification can be downloaded directly from the Triple-S Web site, www.triple-s.org/sssdwn.htm).

The most recent specification, Triple-S XML 2.0, makes use of the Extensible Markup Language (XML). Developed by members of the World Wide Web Consortium (www.w3.org), XML is now in wide use as a means to deliver



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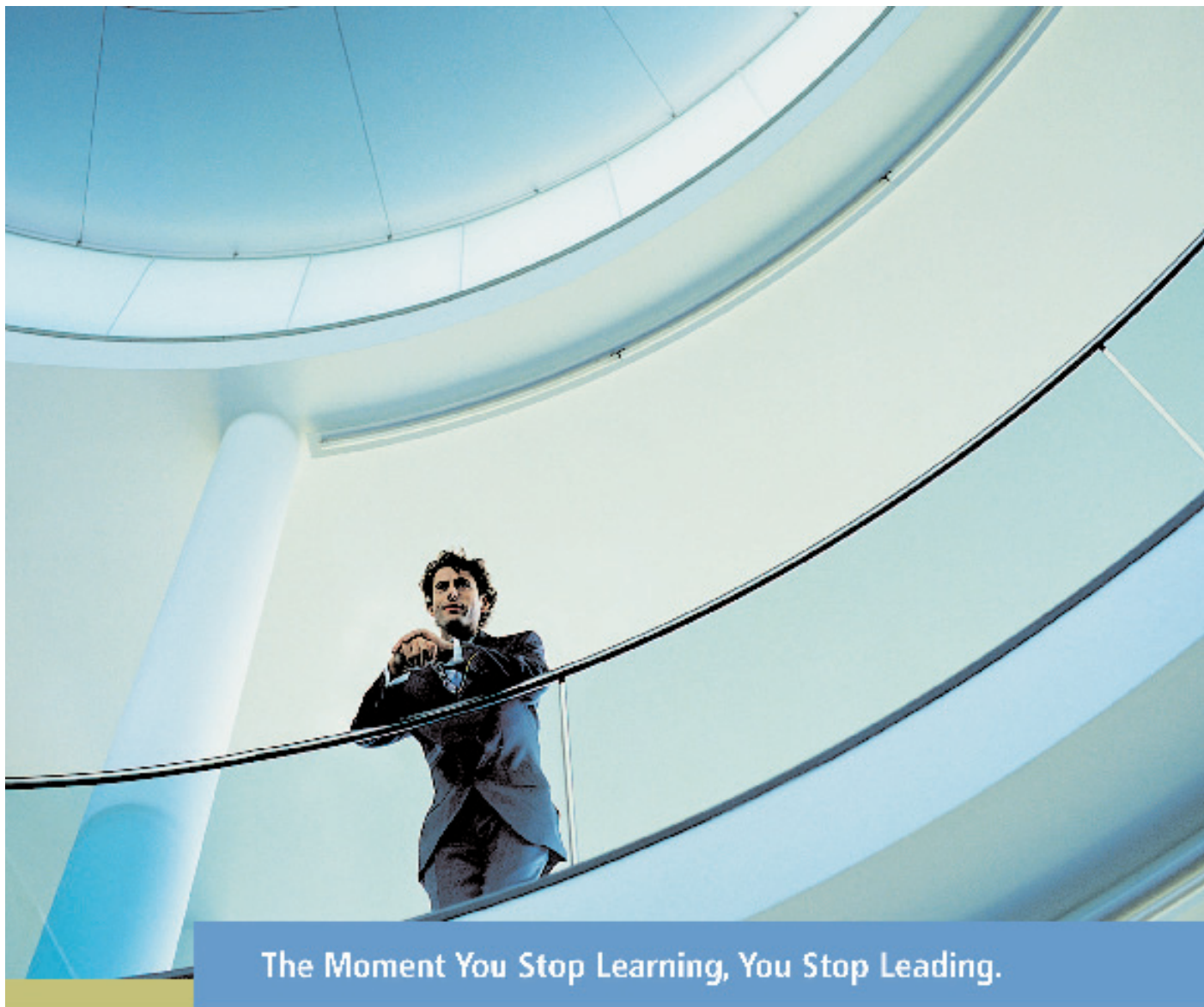
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structured content over the Internet. Many industries, including our own, are also adopting XML as their markup language of choice for structured documents. As a result, outputs from the research industry's Triple-S XML standard can more easily be integrated with other corporate data and systems. A number of MR software developers are going beyond the Triple-S standard by building other unique features of their software around XML, thus allowing for even greater integration with other products.

Two different types of data are output with the standard Triple-S specification: the metadata and the case data. The metadata is often described as “data about the data” and it is this data which is “marked up” using XML. It includes elements such as a survey’s title, the names assigned to questions/variables, question text, response text and variable types. Along with the Triple-S metadata, case data is provided and, simply put, this data contains the actual answers to the survey. Triple-S case data is usually in fixed, ASCII format with one record per respondent. A recent enhancement to the standard allows for case data to be in comma-separated file format (CSV).

Future seat

By adopting software standards such as Triple-S, the MR industry ensures itself a future seat at the table of corporate decision makers. Beyond the interoperability of packages that handle survey research data, we are increasingly being asked to integrate our data stores with other business functions such as operations and finance. With XML complementing and, in some cases replacing, traditional databases, the most recent XML specification of Triple-S looks especially promising. Our ability to integrate MR data with other departmental data should enable us to move lock step with other business units well into the 21st century. | Q



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By Bridget Shirley and Sally Evans

international research

You say tomato...

A growing number of American qualitative research projects now require fieldwork in one or more of the major markets in Western Europe. Increasingly, U.S. qualitative companies are forging international links and overseas partnerships with European agencies to accommodate this demand. All too often, European projects create huge anxiety - everything from travel scheduling and terrorist threats to coping with cultural diversity and language, as well as the perplexing array of public,

religious and private holidays, etc.

The biggest frustration for European fieldworkers is learning to cope with the continual U.S. client pressure for daily updates on respondent profiles and the difficulty of obtaining this information from European agencies not used to such fast-

moving, instant-feedback-demanding American ways. The cliché of Americans moving much faster than “slower” Europeans is all too often encountered when trying to apply tried, tested and trusted domestic qualitative project management procedures and service standards to international projects. So why is everything so different in Europe when it comes to project management of qualitative focus groups?

In Europe, qualitative research projects are often handled differently than in the U.S.

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Different history

Well, for a start, America and Europe have a different market research history. Qualitative research in America can broadly trace its origins and growth back to the quantitative model where systems, structures and procedures were much more rigid and formalized right from the beginning. There was always more of everything – more markets, greater sample sizes, bigger budgets and larger business strategies to satisfy. Consequently, a more consistent domestic model developed with the earlier use of databases, in-house phone rooms and a plentiful choice of efficient facilities.

In Europe, qualitative research developed much more independently and fluidly with closer links to planning, creative understanding and experimental psychology. The result is a much more diverse and eclectic European model with greater infor-

mality, variety and recruitment style across cultures and within individual markets. Europe lacks the standardization and consistency that most Americans expect to find in their domestic marketplace. There are now some excellent agencies and an increasingly wide choice of efficient facilities in Europe. But there are also some truly terrible ones.

Tales of woe

All U.S. international researchers have their tales of woe and dreadful experiences. And with each difficult or disastrous focus group experience in Europe, their anxiety increases. What they seek are the comfort levels that they find at home; American procedures within European cultural diversity.

In examining the differing history of focus groups in America and Europe, one of the biggest variations is in the use of databases for qualita-

tive recruitment. In the U.S., recruitment via databases is a mature and accepted methodology. Respondent databases and the use of in-house phone rooms in one form or other have been standard since the arrival of computer technology. In Europe, their use is very much in its infancy and indeed many are still a subject of much methodological controversy. Many European agencies remain reluctant to embrace the new technologies. Many European respondents are suspicious of the process. A confident infrastructure is only just arriving.

Effectively, much European recruitment is a generation behind America and has its feet firmly rooted in old, traditional ways. The majority of European qualitative recruitment is still done using these established methods – little black books, “cardigan” recruiters, Rolodex addresses and face-to-face or tele-



phone contacts. Purists can sometimes frown upon even e-mail communication with respondents.

All in all, European recruitment can be much more covert, protective and limiting. Recruiters “guard” their contacts and agencies will often avoid asking awkward questions of their fieldwork suppliers for fear of upsetting them. There are greater levels of timidity and nervousness when booking out projects. Many agencies use external freelance recruiters who are less easy to monitor and who can afford to be very selective about which respondents they will or won’t recruit.

By contrast, the American system is much more overt, accountable and easier for clients to monitor and track. There is a much more businesslike approach in America – faster, more efficient and more consistently procedural in all ways. Much of the recruitment is done in in-house phone rooms where conversations can be openly monitored and respondents re-screened.

Accountability is easier to track and monitor in the U.S.

Longer screeners

Another reflection of this can be seen with U.S. versus European screeners. American screeners are generally longer (nine to 10 pages), more complex and intensive. European screeners are generally shorter (three to four pages) with many more open-ended questions – once again more suited to the more traditional interviewing approach. European agency personnel often describe U.S.-generated screeners as obsessive. It is quite common in Europe to hear agencies apologizing to their recruiters for the length of U.S. screeners: “Sorry it’s so long but it’s another blockbuster from America.” Their American clients would, of course, simply describe themselves as being justifiably meticulous – an approach all the more necessary in overseas markets where respondent quality can be so variable and project costs so much higher than in the U.S. Quality of

customer service and client satisfaction seem to be much more part of the American business psyche.

Europeans, by contrast, focus very much more on quality of life. Hence the difference in pace.

Another difference involves respondent confidence. In America, respondents (whether medical, business-to-business or consumer) have been in focus group databases for years. Most have had good experiences with research – comfortable facilities, big incentives, interesting sessions. So much so that referrals are a major component of agency databases in the U.S. Good focus group research experiences have created a culture of confidence in focus group methodology and mutual respect. Once again, in Europe the whole industry is much more fragmented and diverse. Yes, there are now some agencies following the U.S. model and building up a similar rapport with respondents. Yes there are some excellent viewing facilities where respondents enjoy their experience. But the covert nature traditional methods of European recruitment, the suspicion of both researchers and respondents of databases (as sales rather than research tools) and a general reluctance to see respondents as a sustainable resource means that there is much too much variation.

As before, there is the very, very good but also the very, very bad – poorly recruited samples, low turnouts and inadequate focus group experiences all around. No wonder European projects create high stress levels for U.S. clients. They want the certainty and guarantees of quality and service that they find in their tried and trusted home market agencies. They want no unpleasant surprises.

Settling down
Happily, the unpredictability of European project management is gradually settling down with the arrival in Europe of several of the large U.S. qualitative service agencies, who have responded to client demands for the same consistent project management procedures in

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Europe that they expect in America.

Many U.S. clients can see the advantages of a one-stop shop through which all their project bids can be coordinated. More significantly, there is a new generation of international project managers in Europe who are familiar with the high service expectations of U.S. clients commissioning overseas research and are able to provide an effective European bridge to carefully guide clients and their projects through the cultural diversity and higher costs of carrying out focus groups in Europe while at the same time fulfilling U.S. procedural expectations and making sure that the project is successfully completed.

A key element in the formation of this strong, effective European bridge has to be the adoption of a set of best practices so that the commissioning client knows what to expect in Europe and is aware of aspects of the project planning which may need adjustment in different countries. Examples of guidance may include lead times and deadlines, market and facility selection, language and translation issues and specific specialties and conditions. The most effective way of running pan-European projects is to seek input from local suppliers and accept their guidance where appropriate.


Great communication

Conducting successful international focus groups requires a great deal of social and cultural understanding. Key to the success of any project is great communication between client and agency as well as a thorough understanding of the local markets involved. Many agencies now have a best practices guide, so that challenges faced in certain European markets can be appreciated. Some U.S. clients may know, for instance, that over-recruiting for groups in Europe is not standard practice; others welcome advice on local recruitment policies. Some agencies feel it best to advise that most Europeans do not speak English to the level required for

groups/IDIs. Many European cities become ghost towns during the summer months and successful recruiting can be a real challenge at these times. Either way, a guide to best practices in Europe issued to the client up front by the agency can be invaluable in avoiding misunderstandings and assumptions about local markets.

To get the most from research projects out of U.S. settings, one must

have an open mind and an aptitude for embracing the unknown. People from different cultures and countries behave differently. It is not a United States of Europe: one cannot and should not assume that all Europeans behave like Americans. Ultimately, the most successful and rewarding projects are those where clients have embraced the differences and applied a good dose of common sense and cultural understanding. | Q



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Far away but up close and personal

It has been said that the U.K. is a hothouse for new and innovative research techniques and methods. Agencies and clients alike are often experimenting with new approaches, particularly when it comes to conducting qualitative research. Coupled with this, new methods of disseminating research findings are being explored, with the aim of avoiding the “death by PowerPoint” approach. However, when it comes to transposing this onto the international arena, it can be a different story.

For research projects which span continents and involve many different countries, it can be difficult to encourage this same innovative approach in research techniques and methods of dissemination.

Research projects requiring insight from across the globe are usually highly strategic pieces, with many stakeholders (who are often scattered around the world). Using unproven, innovative approaches for high-value projects of this nature can be seen as risky. After all, you know what you will get out of running a series of focus groups and you need buy-in from all parties involved. There is also the view that budgets can’t withstand giving free rein to creativity when conducting qualitative research internationally.

However, there is a strong case for harnessing and nurturing this creativity and it shouldn’t simply stop at a domestic level. While focus groups and in-depth interviews can work for certain research needs, we could be in danger of not only succumbing to death by PowerPoint but also death by focus group!

We are now seeing a change in clients’ research needs and an interest in taking consumer insight one step further. It’s not simply enough to understand what people say they feel about new products and services. There is now a much greater focus on investigating consumers’ daily lives – their routines, their frustrations, their “inspiration points,” their aspira-

tions – to understand how our clients can develop desirable products and services. This is not something that can be easily done through a series of focus groups or other traditional qualitative research. It needs to go much deeper than that, to the subliminal level.

Many have adapted to these changes and embraced them when

Use technology to shorten the distances of international research



By Caroline Richardson

Editor's note: Caroline Richardson is project account director at Numwood, a U.K. research firm. She can be reached at carolinerichardson@numwood.com.



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conducting domestic research. However the thought of doing so on an international project can strike fear into the heart of any researcher. How can this logistically work on a global level? How can we undertake this without blowing the research budget completely out of the water? And importantly, how can we feed these results back to clients and stakeholders globally?

Too many obstacles? Maybe we'll just stick to good old focus groups. That way, everyone one will know

what they're doing and everyone will know what they are getting.

A step further

For those prepared to take it a step further, the more innovative alternative that immediately springs to mind is ethnography, a research technique that is frequently bandied about and scrutinized. To many, it is the answer to conducting innovative qualitative research. However you will often find that budgetary and time constraints usually negate the possibility of con-

ducting pure ethnography.

More and more often, we are being asked to conduct research as cost-effectively as possible, in as little time as possible and pure ethnography checks neither of these boxes. Particularly when applied to international research, it often isn't the answer. If stakeholders in the U.S., Europe, Asia and Africa are relying on the research findings, they will not be prepared to wait for months on end while time is spent with consumers and still more time is spent analyzing their behavior!

However, it is possible to use alternative research techniques and methods of dissemination for global projects. These can be conducted cost-effectively, without the anticipated headaches outlined above. The following case studies illustrate this. These are not off-the-shelf examples, as there is no one solution to any research need and set of objectives. They illustrate the need to push the boundaries when conducting qualitative research internationally.


Alternative ways

Gaining a deep understanding of people's daily lives requires the commitment of respondents over a length of time. Avoiding pure ethnography, there are alternative ways of getting to know consumers as individuals while making the most of technology and visual stimulus to allow findings to be quickly and easily disseminated around the globe.

A panel approach can be taken to understand the daily lives of consumers and understand the journey they undertake when considering and using new products and services. It allows researchers and clients to follow people's lives, tag along on the customer experience journey, understand what they are going through, measure satisfaction and determine the points at which they may be likely to switch and other potential areas to capitalize on.

Running a qualitative panel on an international level doesn't simply have to incorporate the usual qualitative techniques of depth interviews, etc. Respondents should be given a vehi-

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cle to record their activities, thoughts, emotions, hopes and aspirations without having to repeat them to a researcher in person. This can be done through the use of Web and mobile technology. By setting up a dedicated Web site, designed for the specific project and panel, respondents can log (in a journal-type approach) anything and everything of relevance, having been briefed at the start of the project. Respondents can record these thoughts on an ongoing basis in their own personal area. They can also be prompted with questions by the researcher according to their responses and even blog in forums with other panelists. It can even be taken one step further, encouraging the use of Web cams and podcasts for visual impact.

Allowing for the fact that consumers experience many things away from their desk and their Web browser, they can be given other means of constantly logging this information, almost in a journalistic approach, using PDAs, SMS messages, MMS or even a phone number they can call to leave a voice message.

All these options let respondents record their experiences in real time and give researchers insight into their experiences, almost as if they were accompanying them on the journey in person (without the expense of being there every step of the way!). If

this is occasionally supplemented with the more traditional qualitative techniques of depth interviews to prompt, encourage and develop understanding, then the result is a full, all-encompassing understanding of the consumer and their personal journey, something which cannot be derived from the sterile environment of a focus group.

“Panels are lengthy,” I hear you cry! “How can we get results quickly and how does this lend itself to an international approach?” Not only can the researcher have access to the customer experience and journey, but through the use of a Web site, clients across the globe can log on and view the responses at each stage of the journey. They can even interact with the respondents themselves, by responding to their blogs – a true form of customer closeness. This constant feed of findings allows dissemination to take place on an ongoing basis, letting clients feel close to the research and meaning that the presentation of findings at the end of the panel or at mid-points simply serves to clarify and summarize.

In terms of logistics, the respondent Web site can be set up and managed by the central coordinating agency, allowing cost savings. Translation software can be used and both the local and global researchers take responsibility for absorbing the customer’s jour-

ney, with the local researcher prompting, providing the local market knowledge and completing any of the in-person touchpoints.

Bring to life

In another example, this time focusing on effective global dissemination in particular, our firm was tasked to bring to life a segmentation study for stakeholders across the globe – insight specialists, marketers, product developers and external stakeholders. Having already completed extensive qualitative and quantitative research to identify the segments, there was a need to represent these and to take it a step further beyond the usual PowerPoint case study profiles.

Again, an ethnographic approach was used to spend time with respondents in their daily lives, through various touchpoints – briefing meetings, journals, depth interviews, observation. However, importantly, all of these interactions with the respondents were videotaped. This enabled us to build a series of visual records of each of the individual segments. The films were completed by segment (showing each segment across all countries) and by country (showing all the segments in each country). Stakeholders across the globe were then able to download these films from their desks to truly understand the segments. The films have visual impact and staying power, giving product developers and marketers an understanding of exactly the type of people they are targeting.

Making the most of the visual element allowed minimum time to be spent with the respondents, with maximum impact for the clients. The filming and production was managed centrally, with local researchers used for the respondent touchpoints.

Think more innovatively

These examples point to the fact that, when, designing or commissioning global research programs, clients and researchers should not be afraid to think more innovatively and creatively. Technology can allow us into the lives of consumers over a period of time, rather than simply a snapshot view of their lives. Make the most of it. | Q

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Q&A: Research in Turkey

For his annual contribution to our international research issue, *Quirk's* West Coast ad rep/roving reporter Lane Weiss traveled to Turkey to speak with Cem Akyol, general manager of Bilesim International, an Istanbul research firm.

Lane Weiss: Tell us a bit about your company's background.

Cem Akyol: Bilesim International Research and Consultancy Co. was founded in 1984. In 1999, it became the only Turkish research provider that has the ISO 9001 Quality Certificate. Currently, we enjoy serving our client companies with our expertise in consumer attitudes and habits, advertisements, company research, product tests and advertising expenditure studies.

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

Face-to-face type of interviews using pen and paper is the most commonly used research method in Turkey because its applicability and efficiency is higher than others. About 70 percent, as of 2006, of the interviews conducted in Turkey were face-to-face. The usage of telephone interviews shows an increase because telephone penetration has reached acceptable levels. I think telephone interviews will take over the position of face-to-face interviews in the near future. These two methods are followed by focus groups.

Is Internet research becoming more popular and more viable in Turkey?

Only 20 percent of the population in Turkey has Internet access, and the largest two groups of users are the youngsters and the people with a mid-higher education. So today, we have very low coverage, which makes it not feasible to do interviewing using the Internet. In five to 10 years the Internet penetration will become high enough in Turkey to make Internet research viable, but it will not replace the face-to-face or phone interview.

What are some of the ways you see the Internet affecting market research in Turkey and around the world?

Internet is going to be the biggest research method around the world, because it makes data collection easier, faster and of course



Cem Akyol, general manager,
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much cheaper. It is cheaper, because you don't need to pay anything for data entry or data gathering, and you don't always pay respondents either. You don't care if it rains or snows outside; you don't need to rely on interviewers' support. You can simply ask your respondents to do the interview when they have some free time, unlike face-to-face or phone interview, which require advance scheduling.

What are some of the problems facing marketing research in Turkey and around the globe?

I think the trickiest issue in marketing research is the trade-off between quality and other constraining variables such as time and money. On one hand, research users need the most reliable data possible on which to base their marketing decisions, and they have other concerns such as time pressure and economic constraints. In such cases, besides conducting top-quality research, the research provider has an additional responsibility to maintain the optimal conditions both for the research project itself and the company using it. This presents a serious challenge for marketing research in Turkey since it is still a young industry and we, as research providers, have both to establish trust among and provide consultancy to the business environment in addition to our core responsibilities.

Are there privacy laws in Turkey that make it difficult to conduct legitimate marketing research? Does telemarketing have a damaging effect on legitimate research, as it does in the U.S.?

Other than the ESOMAR codes and personal ethics, the research agencies in Turkey are not bound by any special law. Regarding telemarketing, we don't have any solid data on the issue but it might have

lowered response rates in telephone interviews.

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

In the last decade, a lot of multinational market research companies have acquired local companies in Turkey. The consolidation is helpful in the sense of sharing information and knowledge, as well as constructing and obeying the ethical rules of research. Consolidation also helps research companies provide quicker service to their customers for regional and/or global studies. Here, there is an easier follow-up and control mechanism, fewer budgetary and other research source concerns for the research company. And the customer can deal with a single person or company within a regional/global study.

On the other hand, however, consolidation in the market research may cause research companies to lose flexibility in their activities and studies, etc. More consolidation, in a way, means fewer tailor-made studies.

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?

Most of our clients have reasonable expectations about what they can learn by conducting marketing research and most of them make use of the information they obtain from the research. However some of our clients do not exactly know what expectations they should have and how they should use the information obtained from the research. In this situation we assist our clients about research aim and methods, explain to them what they can obtain from the research

and how they can examine and provide effective use of the information obtained from the research.

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

Other than providing the most reliable data as possible, research providers should assist their client companies when interpreting the data. With that, I am not referring to consultancy service; rather, to a well-thought data interpretation as opposed to the mere presentation of the data at hand. Further steps towards action are the responsibility of the client company while our main duty is to clear the path for them in terms of information.

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

In Turkey, more than half of the research is consumer research and clients are mostly from manufacturing industries, media, TV, and business and financial services.

In general, large multinational companies do more research than SMEs [small to medium enterprises] or local companies. Among our clients, there are companies, mostly multinational and large ones, who have done research for many years, companies who have done research from time to time and some companies who are doing research for the first time. The trend is however in the direction of conducting more market research compared to previous years.

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

Marketing research seems to be respected more by businesses, and

conducting research is seen as a worthwhile expenditure compared to previous years but still it is not at the expected level.

In Turkey the research sector does not have a large share among other sectors. Turkey is the 22nd largest economy in the world, however the total marketing research endorsement is only \$50-60 million approximately. This amount is not very high in relation to the size of economy and population.

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

One of the things that research companies can do is to work together with academicians to develop new, more reliable and more multi-functional models. Investment in forming, developing and revising research models is needed and would, indeed, increase the respect of businesspeople since more reliable and functional models mean, at the end, more accurate and reliable sources for the critical decisions of businesspeople.

Investment in fieldwork and data areas would also receive higher respect among businesspeople. Fieldwork and data formation/organization constitute the core of the research. Without a proper, accurate and reliable fieldwork and data, the research study is a waste of time and money.

Research companies can also share their case studies and success stories. Sharing experience and success would help businesspeople to understand the importance of research in marketing, illuminate the road they should follow, and earn more respect for the research company/industry.

Last but not the least, research companies can bring businesses together via conferences, seminars and training courses. Such activities are rich sources for sharing

information and experience, for gaining respect, and for activating the sector investments.

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

In terms of size, I cannot say that they are growing but I can confidently say that they are growing in terms of knowledge and having their say within marketing teams. However, this too, is an issue related to the size of the client company as well as to its approach in research and its possible benefits. There are also several companies that are either in the process of establishing their research departments or allocating more people to research endeavors.

Do companies in Turkey view research providers as consultants in information management or merely just as data-gatherers?

Companies differ one from another on many levels including their approach to research in general and to research providers in particular. Another variable affecting companies' view of research providers is the industry that they operate in and their ease in using research data. Companies with less experience with research tend to see research providers as data gatherers since they are not clear about what to expect from research. However, once their prejudices are broken with a balanced combination of accurate data and consultancy in interpreting it, they may become satisfied research users. At the other end of the spectrum, companies with extensive research experience are more realistic about what to expect; and view research providers as consultants also.

How has globalization of the world economy affected marketing research?

Globalization of the world economy has many effects on business

life. The markets and the competition among companies have become international and at the same time harder. The companies, therefore, need to take solid and reliable steps in the market first to survive, then to have a considerable market share and compete with other companies. Marketing research, therefore, is becoming a vital tool for gathering information on consumer attitudes and behaviors and markets and thus is a vital need for companies to shape or re-shape their business actions and investments.

Globalization means also increased sharing and development of information and knowledge. Research methods and research models - more reliable, strong and multifunctional models - have been improved by the use of technology.

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

Although most of our clients are based in Turkey we also serve international clients either via their international research agencies or their local offices in Turkey.

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

To answer this question, we should make a distinction between SMEs and large or multinational companies. Large or multinational companies will rely on a global marketing approach in order to survive and compete with other companies and to maintain a considerable market share globally. SMEs tend to direct their actions according to the domestic market since they do not have the capacity to compete internationally. In this case they rather prefer to tailor their marketing research efforts to each country first. | Q

Q&A: Research in Greece

For his annual contribution to our international research issue, *Quirk's* West Coast ad rep/oving reporter Lane Weiss traveled to Greece to speak to Anna Karadimitriou, client services director of Focus SA, an Athens research firm.

Lane Weiss: Tell us a bit about your company's background.

Anna Karadimitriou: Focus is a privately-owned Greek company, established in 1988. In that same year, Focus launched the National Media Survey, which is the industry survey for radio and press media, which constitutes an important part of our company's identity. This syndicated survey has more than 300+ subscribers including media, advertising agencies and advertisers.

We are particularly active in ad hoc research, with long-standing relations with clients in industries such as media, food and beverage, telecommunications, automotive, financial services, appliances and toys. Another client we are particularly proud of is the European Commission, for which we have conducted all qualitative studies in Greece since 1997, gaining valuable experience in social research and consumer insight on EU initiatives long before launching.

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

Consulting official data from the ESOMAR industry survey for Greece, about 85 percent of the total research budget in Greece in 2004 was allocated to quantitative, while the remaining 15 percent went to qualitative studies.

When we focus on quantitative, surprisingly enough, face-to-face - at-home, in-hall or street interviewing, etc. - is still the most common practice, since it constitutes around 46 percent of total quantitative budget, but among those, very few are conducted via CAPI - approximately 1-2 percent of total quantitative uses CAPI. On the contrary, computer-assisted interviewing is the most common practice for telephone interviewing which, with gradual increase over time, constitutes today approximately 15 percent of total quantitative turnover conducted in Greece. Finally, a large part of the industry turnover is allocated to retail audits and scanning - approximately 30 percent of quantitative.

Here, however, I'd like to note that all the above data are based on turnover allocation, which of course is important and crucial, but by nature is more favorable toward the more costly methodologies, i.e.,



Anna Karadimitriou, client services director, Focus SA

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face-to-face vs. telephone; quantitative vs. qualitative, etc.

According to my personal experience, I would say that although the above depict the general tendencies, research in Greece is dynamically moving towards telephone interviews and especially CATI, while I believe that the development of methodologies such as CAPI and CASI will inevitably follow, given the numerous advantages of computer-assisted methods of interviewing.

Qualitative research is mainly conducted via group discussions, and only a small proportion of qualitative involves in-depth interviews.

Is Internet research becoming more popular and more viable in Greece?

According to the industry's total turnover allocation, online research, either qualitative or quantitative, is very limited for the moment, less than 1 percent.

This can be easily explained given the Internet's penetration in the total population. According to data coming from our offline syndicated survey, in terms of actual figures we are still quite behind compared to other European countries and the U.S. Usage within last month is approximately 28 percent among men and women, aged 13-70 years.

However, research via the Internet gives us valuable information and there are positive signals for the future. There is a considerable increase in consumers with online access, especially during last five years, which may reach a rate of +300 percent for specific targets. Further, we know how valuable the Internet is in accessing specific target groups, such as professionals, younger ages, upper socioeconomic classes, etc., not only in terms of research but also in terms of marketing and communication activities.

We as market researchers have no other alternative but to incorporate online research more effectively in our daily routine. But at this time, however, online research cannot replace

methodologies where wide target representation is needed and personal approach/contact is necessary.

What are some of the ways you see the Internet affecting market research in Greece and around the world?

In Greece, and I suppose in equally developed countries, a major effect of the Internet that I can see is its effect on consumers' mentality, values, needs and finally actual behavior and choices, as part of more general notions of technology and globalization.

We experience great changes in short time span and a constant resetting of what used to be taken for granted. In market research practice, as in communication and marketing in general, this means that standard consumer classifications, the traditional target groups either by demographics or psychographics, are no longer enough. When there is so much diversity not only among apparently similar individuals but also within the same individual, a close monitoring of the consumer is more than ever necessary.

Based on that, research areas that will become more important in the future may include qualitative studies for in-depth understanding of what is happening, research among opinion leaders/trendsetters to spot early changes, continuous trackers to closely monitor main indices, and ethnography to observe discrepancies of behavior that respondents/consumers themselves tend to neglect or do not even realize!

What are some of the problems facing marketing research in Greece and around the globe?

From time to time, the industry's overall reliability and image may be harmed by discussions and disputes regarding two very specific types of research: those of political polls and media measurement. Behind those disputes and bad publicity, one can find poor use of results or wrong

interpretation of results, especially by people who are not users of such research. Both these types of research are particularly sensitive thus similar problems are evident in other countries around the globe.

However, even as we speak, MR agencies, relevant professional associations and governmental bodies are in the process of finding a solution to legitimize and regulate political polls and media measurement in a way acceptable by all parties involved.

Another problem that the Greek MR industry is facing has to do with increasing competition from indirect and often not legitimate MR services.

In general the MR industry is quite mature but also in a somehow transitional phase. There are full-service research agencies undertaking all stages of research. More recent entrants are field-and-tab agencies, mainly regional, that offer primarily fieldwork services.

At the same time, almost all multinational research groups are for many years now represented in Greece, while there are Greek large and smaller-sized agencies. In view of the above, competition is quite hard, but in any case it is direct competition where agencies compete with each other on more or less equal grounds: expertise, adherence to MR codes of practice, etc.

In addition to that, the MR industry currently faces external competition coming from consulting agencies and sectors such as telemarketing, call centers, promotional firms. Such rivals of the MR industry, without having the expertise, the know-how, the means for appropriate sampling, questionnaire building, etc., and MR's ethics codes, provide lower-quality service at a cheaper price.

To this respect, it seems more than ever necessary to familiarize and appropriately educate clients and research users to help them be able to judge their research providers and make better choices.

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The Fine Art of Marketing Research

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?

Fortunately, compared to some years ago, fewer and fewer clients try to quantify results coming from qualitative studies, i.e., by asking, "How many said that?" in qualitative studies or attempt to elicit deep-rooted reasons and explanations behind responses in quantitative studies. This is probably because clients gradually become better acquainted with market research principles and thus have a more clear knowledge of what each type of research can deliver. Also, younger executives are better educated than in the past, since MR courses are nowadays included in almost all relevant university degrees.

On the other hand, an "unreasonable" expectation that has not seemed to improve over time is clients' need to cover too many topics within the context of one study, usually resulting into overlong questionnaires or discussion guides – most of the time at the expense of the project's quality. At that moment, it is the market researcher's role to distinguish the necessary from the unnecessary and alleviate the client's insecurity, but this is not always an easy task!

Finally, the difficulty of balancing cost controls while maintaining equal levels of quality increases each year. First of all, research agencies not only have to face the industry's internal competition rules – the more agencies appear, the harder the competition – but also external competition by agencies such as call centers, telemarketing, consulting agencies, etc.

Clients on the other hand, affected by overall economic conditions, request lower and lower pricing and more favorable terms of payment, a tendency which is more prevalent among local ones, but is evident in international clients as well.

In general terms, clients in Greece are quite well-educated and familiar with market research, acknowledging its role and value. The degree to which, however, information obtained from research is effectively used in strategic decision-making seems to vary depending on the client, and specifically on such parameters as the client's internal structure and organization, and actual participation in the decision-making process.

As a general rule, one can say that long-standing relationships between a research agency and a client are the more effective ones, which allow MR executives to become part of the client's marketing team. Such examples, although not the common practice in our industry, are considerably increasing in the recent years.

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

What needs to be done above all is to place market research in its precise and actual context – both internally among MR professionals and executives and externally among clients.

Recently there seems to be a debate on whether we are consultants vs. data providers or statistical analysts. I think we are neither one nor the other. We are not business consultants in the sense of analyzing in detail the overall economic background, investment economics, business plans, etc. Also, we are not data gatherers in the sense of providing data without taking the responsibility of recommendations and actionable guidelines.

Our role is to learn from a very crucial communication channel between the marketer/advertiser and the consumer. To this respect, MR has an important role in the actual decision-making process, but constitutes only a part of our clients' total business practices and activities.

MR is not panacea, rather it is a vital and helpful tool in the decision-making process, along with

other implementation plans. There are many times when research is used incorrectly or the client has unrealistic expectations and this is why we need to educate clients better on what can be attributed to MR and what cannot.

Clients on the other hand, in order to make maximum use of MR, should allow MR to become a member of the brand team, not on a short-term or occasional basis but long-term, sharing with MR people marketing and communication questions and problems, as well as future plans and aspirations.

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

As everywhere in the world, market research in Greece follows the overall product/service development, market trends and communication activity. To this respect market research in our country is used by almost all industries and services that I can think of. These include traditionally heavily advertised categories and industries such as FMCGs, automotive, food and beverage, but also more recent ones such as telecommunications and IT, financial services and banking, pharmaceuticals.

Media research made its entrance in late 1980s/early 1990s, along with the launching and consequent booming of privately-owned radio stations, TV channels and international and local publications. Political research has a long-standing presence, with increasing investment and dynamic media exposure/support in the years that followed.

The most important development during the last five years is a considerable increase of MR activities on behalf of the public sector in general. Public or semi-public organizations and enterprises have become more and more interested in market research, as part of their privatization or simply in the process of modernization in line with free-market rules.

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In addition to that, many public initiatives and policies include communication support/campaigns, the effectiveness of which needs to be evaluated via MR either on a local or national level.

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

As I mentioned earlier, MR's role and importance is generally acknowledged. More and more businesses realize the enormous risk of taking decisions and proceeding to investments without prior solid investigation. Also, both multinational and local enterprises use continuous research tools in order to regularly monitor the overall market development and their products' positions.

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

Greek research agencies can do things individually but also collectively through the industry's association, SEDEA, which was founded 16 years ago. It has done considerable work in setting the rules and codes of practice of MR in Greece, as well as the industry's promotion both among the general public and among institutional bodies.

I believe that the best way to ensure an agency's good reputation is via top quality work while respecting client's time and budget. Of course, good reputation is built through time.

One of SEDEA's most important contributions to the industry is the creation and implementation of a quality control of data collection system. Based on this, current members are regularly controlled, while candidate members/agencies prove their good practices for a period of one year, prior to entrance.

Are the research departments in the

client companies in Greece growing or shrinking?

Traditionally, individual and well-organized research departments were most often found at large multinational companies. However, in the last decade, along with the increasing use of research, many businesses acknowledge the effectiveness of having among their marketing team employees with a research background who are able to organize and monitor research projects and analyze research results further.

Such businesses come from the advertising sector, the media environment but also from middle-sized businesses both national and international. So as a general trend, clients' research departments in Greece are growing, even if in practice this does not necessarily mean a well-organized department with many executives. Rather, it's often a team of few people.

This development is generally positive in the overall cooperation between MR agencies and clients. One somewhat negative effect for the MR industry per se is that as more and more MR professionals move to the client side, it becomes even harder for MR agencies to find, educate and keep well-trained and valuable executives.

How has globalization of the world economy affected marketing research?

I think I can only speak about Greece's position in the global scenery. What I recently feel is that Greece is gradually gaining ground as an important player in the Balkan region and Northeastern Europe. Many Greece-based enterprises are expanding in Balkan countries, which is probably the reason behind the gradual increase of international research in Greece.

Another relevant aspect is the introduction of euro. For sure, transition to the euro was not easy, especially for consumers, who experienced considerable increases in the cost of living, although all acknowl-

edge the advantages in a wider perspective. One reaction on the business side to that was the need for cost controls from the part of the clients, and costing difficulties for MR agencies that I mentioned earlier. In practice, however, the introduction of euro brings clarity and convenience in costing issues for international studies (which mainly include European countries) while it eliminates the cost of money per se.

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

The majority of clients - more than 90 percent - are local based ones which include a large number of multinational companies - both manufacturers and distributors - as well as purely Greek companies. International clients are mainly research agencies from abroad, subcontracting research in Greece as part of an international project. To a lesser extent they are also international companies conducting research in Greece, and of course the European Commission that I mentioned before. International clients typically come from Europe, notably the U.K., Germany and France rather than the U.S. or other areas of the world.

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

What I anticipate for the future is a "global strategy with a local air." Globalization is a fact, so global marketing approaches are expected, but I do not think that a global marketing approach excludes or conflicts with tailor-made local marketing efforts.

On the contrary I think that the only route for success is to customize global marketing to each specific country's characteristics and this, apart from local market structure and availability, includes local mentality, social background, behavioral rituals and everyday life elements. | Q



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Differences do matter

Having built TNS' first test Internet panel in 1996, I have witnessed the development and rapid evolution of online access panel best practices over the last 10 years. I am often surprised at how little attention some researchers pay to what I consider critical and important quality components of online data collection via access panels. It is important for users of these valuable sample sources to understand the critical differences between well-run, well-maintained panels and glorified e-mail address lists with few quality controls and low response rates.

During a recent visit to one client company and meeting with their analytic research team, I was asked to share some of my knowledge and understanding of how online access panels operate. The request was precipitated by problems that the research team was having with its study data. Having used a number of different online panel suppliers for a variety of projects, the client had begun to encounter inconsistencies and was concerned about the validity of the research findings. The client had assumed that all online panels were actively managed using similar techniques and best practices. Therefore, the client concluded, these sample sources were interchangeable.

I was understandably surprised to discover that these experienced researchers, who depend on the quality of online access panels and ultimately help make multimillion-dollar decisions based on their data, had underestimated the critical factors involved in ensuring the integrity of the panel they used for research.

Often overlooked but important factors for obtaining quality results from panel research

We reviewed the many important components involved in developing, managing and maintaining a quality online access panel. When we were finished, they fully understood that not all online sample sources are created equal. In their previous work they had interchanged mid-process sample from one supplier that had single-digit return rates with another that was able to deliver the entire sample they required in a single, 12-hour period. At the time, it was a convenient move and it helped them get the

results to their brand manager on schedule. However, it also presented risks to the quality of data obtained and therefore, the usability of survey results.

Increasingly, industry experts are speaking out about these risks. Interviewed about trends he saw for the year 2006, Doug Rivers, head of Palo Alto, Calif.-based research firm Polimetrix, said: "The quality of the



By Efrain Ribeiro

Editor's note: Efrain Ribeiro is global head of access panels at the Owings Mills, Md., office of research firm TNS. He can be reached at efrain.ribeiro@tns-global.com.

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information we collect ultimately depends upon the goodwill and cooperation of those who take our surveys. Unfortunately, some online panels are deluging respondents with multiple invitations per week or even per day. The cost of collecting this data this way is very low, but so is the quality. Clients are often not asking their suppliers the right questions: "Where are your panelists recruited? How often are they surveyed and for how long? How many respond?" The Internet

can deliver high-quality data, but it makes a difference how a panel is managed." (*Research Business Report*, December 2005)

These are just some of the considerations an informed user of online access panels needs to take into account. This article addresses several additional factors that are key to ensuring that your respondents truly represent the audience clients want to reach.

Although there are the usual obvious and important elements that most

market researchers attend to regardless of sample source (such as age/sex demographics, geography and race/ethnicity), this article focuses on the often overlooked but very important and interrelated factors related to panel management. These factors impact return rates and in turn, have the potential to adversely affect representivity and data quality.

- Panelist relationship management

Effective panelist relationship management is the foundation of well-managed access panels and involves choreographing all aspects of the panelist life cycle and being mindful of every aspect of each panelist's contact with you - from the point of prospect identification to recruitment to membership termination.

The primary goals of panelist relationship management are to increase the tenure and cooperation of panelists and to promote the ongoing collection of valid information. The means of accomplishing these goals are consistent, positive communication that respects the panelists and addresses their concerns in a timely fashion, combined with rewards (both tangible and intangible) for their contributions. A good managed access panel approach will collect information at multiple points and monitor this information and its relationship to other panel management factors.

Figure 1 provides a schematic of the primary components of the relationship that TNS maintains with the members of its panel and the key elements of panelist relationship management. TNS has a worldwide network of access panels. In the United States, members participate in studies via the TNS NFO panels.

- Cooperation rates

As with any method of research, respondent cooperation rates with access panels are critical. In fact, an original advantage of utilizing traditional (mail and phone) access panels was their superior cooperation rates versus other methods. These provided cost benefits and, equal in importance, they helped reduce potential non-response error and impact on data quality. An actively managed online



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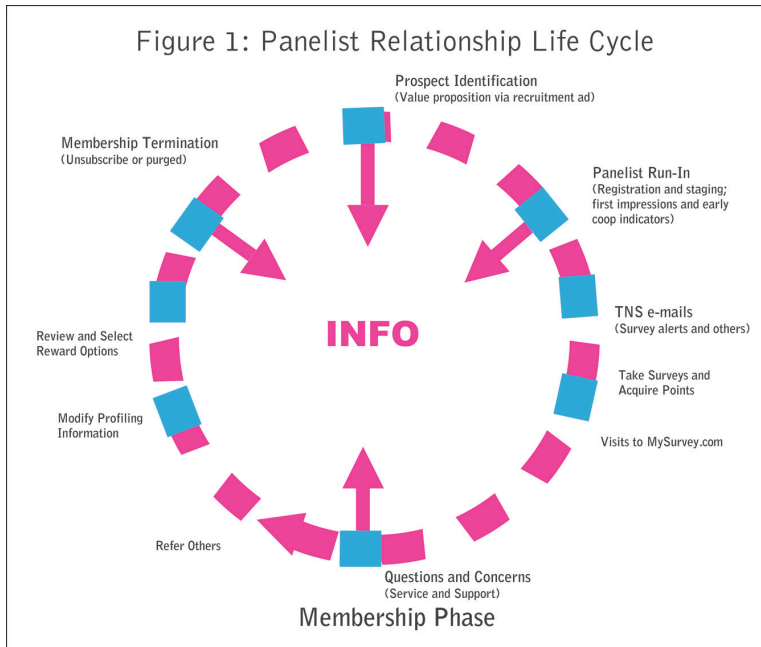
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Figure 1: Panelist Relationship Life Cycle



access panel should be able to achieve cooperation rates in the 40 to 50 percent range through a number of critical strategies. These include: identification and purging of non-active members; a reasonable and fair incentive

program; panelist rapport initiatives, including providing prompt support and assistance when issues arise.

As most of readers know, today many panel suppliers are achieving single-digit cooperation rates.

• Keeping panelist information current

Profiling information enables managed access panels to select samples that are appropriate for the research being conducted. Typically, comprehensive profiling information is collected at or near the time of first registration. However, changes to ownership, health and household composition are quite common, and proactive panel management therefore includes routine collection of updated information. For example, TNS NFO panelists are asked to update most profile information three months after registering and annually thereafter. The three-month initial update allows us to collect information that panelists may have been reluctant to give at first but would be more willing to provide after a trusted relationship has been established. Panelists are also encouraged via our routine communications to notify us of any changes to household composition on an as-needed basis.

It is also vital to keep panelist con-

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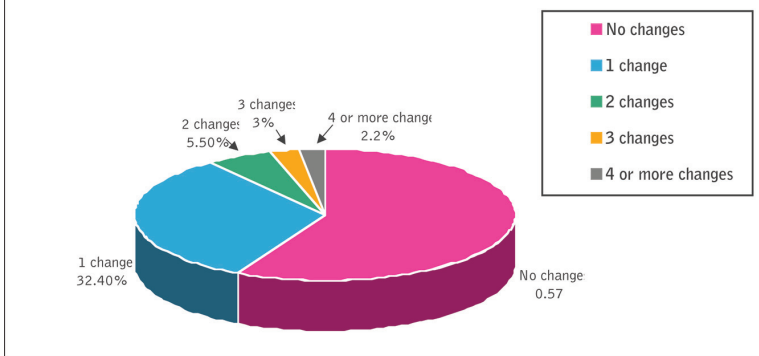
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Figure 2: Frequency of E-mail Address Changes in One-Year Period



tact information current, especially e-mail address, which is apt to change multiple times during the year. A recent TNS study inquiring about the number of changes to primary e-mail address in the past year indicates that over 40 percent of respondents made one or more changes (see Figure 2). Because e-mail is the primary means of contact for most online panels, providing fast and easy ways for panelists to update their e-mail addresses (such as an online information update form) and encouraging panel members to update is essential. Asking panel members to provide a secondary e-mail address to be used if the primary one becomes invalid is another strategy for ensuring continued communication with your panelists.

- Consistent e-mail delivery

You've built your online panel and taken steps to build rapport, keep cooperation rates high and information current, to include current e-mail addresses. Now all you have to do is select the sample, e-mail the survey invitations and you're home free, right? Not exactly.

Unfortunately, online mail is not the same as postal mail in terms of guaranteed delivery. With few exceptions, the post office will deliver all mail given an adequate address and sufficient postage. In the online world, as part of the continuing effort to effectively filter and reduce spam, Internet service providers (ISPs) have the first (and often final) say about whether or not your e-mails reach their intended destination or end up

in the trash.

Recent data indicate that over 20 percent of wanted e-mail never reaches the inbox. Return Path Inc. (a company that provides e-mail monitoring and delivery services) conducted an analysis of 117,761 e-mail campaigns sent between July and December 2005, monitoring delivery rates at the top 28 ISPs and the three most-used corporate filtering systems. They found that non-delivery rates for permission-based e-mails averaged 20.5 percent, with large variations by ISP - from over 40 percent with Excite and Gmail, to less than 10 percent through USA.net, CompuServe, Mac.com and Earthlink (see Figure 3). Non-delivered e-mail is defined as e-mail that is either delivered to the junk mail folder or not at all.

According to a 2005 consumer survey (also conducted by Return Path),

73.4 percent reported that they had e-mail they wanted to receive end up in their junk folder or never arrive at all.

What do delivery rates have to do with sample integrity beyond the potential impact to overall cooperation rates? Consider this example: According to Hotmail, its nearly 31 million unique U.S. users comprise 19.9 percent of the all U.S. Internet users. Suppose you send out a survey today that seeks to measure the U.S. Internet population and Hotmail routes all your survey invitations to the junk folder and/or fails to deliver them at all. You've just lost most of your ability to speak to and hear from almost 20 percent of your desired audience, thereby introducing a non-trivial source response bias.

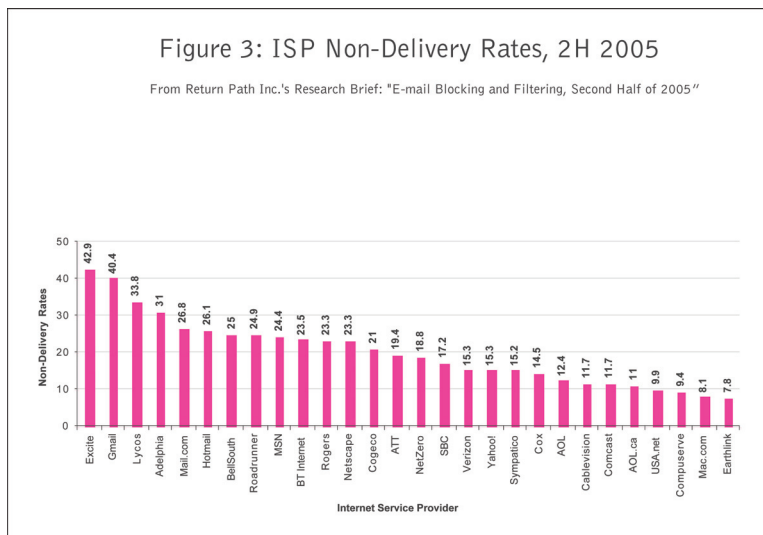
Many access panel companies may not proactively monitor e-mail delivery and therefore, would be unaware of potential bias problems related to e-mail delivery. Additionally, being blind to e-mail delivery issues also means that one cannot judge the efficacy of steps taken to prevent problems or improve delivery rates.

Proactive panel management to ensure quality data includes ongoing attention to several aspects of survey invitation delivery:

- Controlling factors that are known to adversely affect e-mail delivery, including but not limited to e-mail send volume, routine bounce processing, message and subject line content and type of e-mail format. Although attending to these factors takes time

Figure 3: ISP Non-Delivery Rates, 2H 2005

From Return Path Inc.'s Research Brief: "E-mail Blocking and Filtering, Second Half of 2005"



and effort, they are completely within the control of the sender.

— Continuous monitoring to identify and resolve problems quickly. Recommended types of monitoring include blacklist monitoring (are your IP addresses on any major blacklists?); delivery monitoring (do seeded e-mail addresses reach their destination?); open-and-click rate monitoring (do open-and-click rate trends indicate that your survey invitations are being delivered?); and complaint monitoring (are your e-mails being marked as spam or junk by recipients?).

— Keeping current and adhering to current industry standards that promote delivery, such as implementing e-mail authentication methods, segmenting IP addresses depending on type of e-mail sent and obtaining double opt-in permission from your panel members.

— Actively working with ISPs to enhance deliverability, such as subscribing to whitelists, feedback loops or other certification services that enhance e-mail delivery.

— Engaging in an ongoing dialogue with panelists related to e-mail delivery to encourage them to add your domain to their trusted sender list, provide alternate e-mail addresses and to report e-mail address changes promptly.

— Seek and implement non-e-mail methods of survey notification, such as downloadable notification software and encouraging periodic visits to the survey Web site in case a survey is available.

Ensure results

In principle, all managed access panels attend to the often-invisible details associated with panel management. To be effective in practice, however, requires that market researchers implement programs to ensure representative results and high quality data. Because none of the strategies reviewed in this article are one-time efforts and because new challenges present themselves daily, dedicated staff must be allocated to operate and manage these programs and to be on the alert for other factors that may impact data quality.

Over the past five years, e-mail delivery issues and solutions have changed markedly from one year to the next. What works today may not work tomorrow.

Even with proactive panel management, some problems and issues cannot be prevented. Therefore, having problem identification and monitoring in place as a second-tier strategy in the programs you develop ensures that issues can be promptly identified to determine the impact

on survey results.

You may ask if it's worth the effort. My experience is that the payoff warrants the time and resources expended. Having systems and resources in place to manage and monitor these critical factors puts you several steps ahead of panel companies that are less conscientious in their approach. As with many aspects of market research, the devil is in the details, but attention to detail pays off in terms of valid results and satisfied clients. | Q

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Regardless of industry, regional economy or geopolitical boundaries, organizations around the world will always research and collect data on markets of interest. To make the research data relevant for the researching organization, panels are often created to provide specific targeted data on key subsegments of a given population. Some organizations develop panels by sending people into the field to conduct targeted surveys, others send out surveys via traditional mail, and others survey target populations via the telephone.

These methods of panel-based market research have been in use for decades, but societal changes have decreased the efficacy of mail and telephone research and other methods used in conjunction with panel research such as mall intercepts have become prohibitively expensive. As the old traditional methods of panel research become less effective and more expensive, online research tools have been created to satisfy the need for rapid, accurate and highly targeted market research.

Despite the fact that online panel research does offer quantifiable time and cost savings, questions remain concerning the validity of online research panels. Questions pertaining to representative samples, duplication and motivation of panelists, and ensuring that panel members are who they claim to be are issues that online panel providers must adequately address to establish long-term credibility with the organizations they seek as customers.

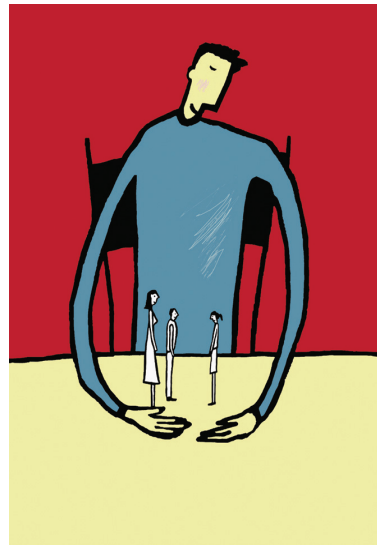
Despite hurdles, companies are embracing panel research

Limited resources

Every organization regardless of size has limited resources to commit to panel research. Although traditional panels provide important market information, methods such as telephone panels or mall intercepts can be prohibitively expensive sources of market information due to labor and travel costs. In the case of telephone panels, depending upon the size and

geographic focus of the study, an organization typically pays five to 100 operators to make calls in a target market that can only be completed in a three-hour frame from 6 to 9 p.m. if the research is being conducted in a single time zone.

Consequently, for the study to collect data in a timely manner, it is in the best interest of the organization conduct research in multiple time zones and hire as many operators as possible at a cost ranging from \$15 to \$20 dollars per completed interview. Complicating matters further,



By Jarad Carleton

Editor's note: Jarad Carleton is an IT consulting analyst at Palo Alto, Calif., consulting firm Frost & Sullivan. This article is excerpted from a Frost & Sullivan white paper provided by Seattle research firm Global Market Insite Inc.



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in order to have a true telephone panel, a qualified list of volunteer panel members is required such that operators call specific people rather than dial randomly from a pre-assigned list of numbers. Since qualified lists are rarely available, companies tend to purchase lists from magazine publishers and other sources at a cost of 5 cents per name. The problem is that a list of 10,000 names may only lead to 100–200 completed

interviews with the desired target population.

In addition, each person called must be screened for desired traits such as ethnicity, income level, education level and other factors that will lengthen the duration of the call and increase the cost of the study. Supplementing the data obtained from a phone or mail panel with mall intercept research methods can lead to a more targeted study, but

costs quickly add up with this technique as well. Expenses such as labor, travel, remote office space and data entry can push costs above \$10 per completed interview, which can be quite expensive if 1,000 interviews are needed for statistical significance.

In almost all organizations, budgetary issues will arise when panel research is an integral part of a market research study. As a result, more organizations have begun actively utilizing outsourcers that specialize in online panels.

Keeping them engaged

One of the more difficult challenges for organizations that conduct primary research on an infrequent basis lies in the management of online panels and keeping panel members engaged through personalized communities. Most organizations are poorly informed regarding the difficulty of these tasks and mistakenly assume that a Web site and Access database are all that is needed to manage a panel.

That assumption couldn't be further from the truth as there is significantly more to online panel management than a simple database and static Web site. There is a considerable amount of work and communication involved with panel management including, but not limited to:

- obtaining a representative mix of people on the panel;
- ensuring that e-mails make it past spam filters and to panel members;
- keeping track of new e-mail addresses;
- checking to ensure that panelists are who they claim to be;
- tracking responses from panel members to ensure questions are answered properly;
- tracking and paying incentives to millions of panelists; and
- answering panel member inquiries in potentially several languages.

There is also the challenge developing a large enough panel such that members don't become exhausted from endless survey requests and quit the panel. Conversely it is also important to avoid underinterview-

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ing panel members, which creates another set of problems including panelists that don't remember volunteering to take surveys, old e-mail addresses, no response to survey requests, and requests to opt-out of the panel.

Attrition of panelists is a tricky problem to solve when the level of contact isn't carefully managed. Unfortunately, proper panel contact management is an expensive full-time project for medium and even large enterprises with resources to devote to the task. Because most companies don't understand the complexities of panel management, it is common for companies to underestimate management costs by 50 to 75 percent as they fail to accurately project the total expenses involved with panel development and management.

In fact, the costs involved to recruit an active panel large enough to support regular research are staggering (to support regular research, a panel of approximately 100,000 persons is required) and typically range between \$250,000 and \$300,000 before research even begins (based on average acquisition cost of \$2.50 to \$3 per person). On top of those costs are additional expenses related to keeping panelists engaged through regular contact or personalized communities, the cost of the technology platform to support the communities, individual profiles, the Web site as a whole, and incentive management. Furthermore, after the panel has been created, panel attrition begins making it necessary to continually recruit additional panelists (again, at a cost of \$2.50 to \$3 per person).

Time constraints

One of the most common problems facing organizations that conduct panel-based market research is that of time constraints. If it takes too long to collect data, the results become skewed with time and informed business decisions cannot be made based on the research. An issue that arises with panel-based research via the telephone is that there is only a three-to-four-hour block of time each day during which an organiza-

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tion can conduct research. Since most studies have a short four-to-seven-day timeline, more resources must be shifted to call center operations which can rapidly consume more research study funds than what may have been budgeted for.

Another issue that interferes with timelines for panel-based research via telephone is that response rates are falling each year as a result of Caller ID and other call-screening technology. Furthermore, studies that require respondents to answer at specific times of the day or that require all of the data to be collected within 48 hours have become increasingly difficult to conduct. Unfortunately, market research requests have become so common that many potential panelists feel inconvenienced or disinterested, leaving organizations with a smaller pool of panelists to choose from. As market research requests continue to saturate the global marketplace, fewer people are willing to make the time to answer marketing questions in the mall or via tele-

phone when offered little or no incentive to participate.

Difficult to manage

As previously mentioned, internal panel development can be costly and difficult to manage even for large multinational firms that have sufficient resources to undertake the demanding task of maintaining a large panel. And in the event that an organization wants to conduct research in multiple countries, it will have to find employees with appropriate language skills and knowledge of privacy laws different countries, which can make panel-based market research even more difficult.

Outsourcing panel development and management to a third party enables the organization to focus on its core competencies rather than on the difficult task of vetting potential panelists and maintaining the long-term interest of the panel through incentives and community building. It also enables the organization to conduct research simultaneously in

different countries without needing to find employees with pertinent language skills and without needing to understand the details of privacy laws in different parts of the world.

Although large multinationals have the ability to navigate issues related to privacy, incentives and community-building, a panel outsourcing company has economies of scale that are difficult to match in areas of quality and price even for a large consumer products organization.

Conducting research via an online panel does require the researching organization to be familiar with issues that lead to panel integrity problems. When a company develops its own online panel or uses one from an unsophisticated market research outsourcer, panel integrity problems can skew the research results.

Examples of panel integrity problems include, but are not limited to:

- respondents who participate in multiple panels;
- respondents who sign up multiple times for the same panel using different e-mail addresses and different mailing addresses;
- respondents who identify themselves as someone they are not, i.e., an executive, of a different ethnicity, a male answering for a female, a 25-year-old female posing as 40-year-old male, etc.

Unfortunately it is impossible to ensure the integrity of all panel participants, but understanding the issues that create panel integrity problems is the critical first step towards ensuring research results are as accurate as possible.

Even more important is the second step, which is having a clear understanding of safeguards that should be put into place to minimize panel integrity problems and make them statistically insignificant.

Safeguarding against panel integrity problems can be a complex task and always requires a multifaceted approach. Although there is little that can be done to prevent a panel participant from enrolling for a panel with another company, it is possible to minimize one person participating

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in multiple panels for a single company. This is possible by creating a system of checks and balances in which it becomes difficult to sign up multiple times and to participate more than once in the same survey.

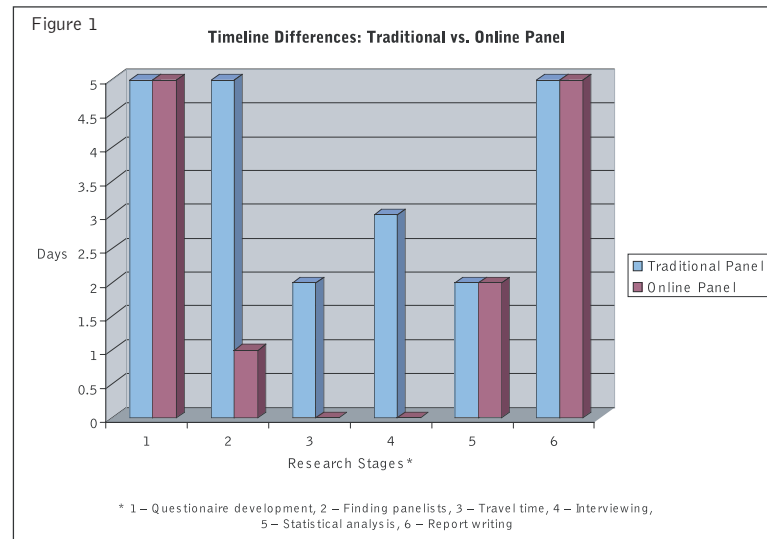
One of the most common methods of subterfuge attempted on the Internet today is when a person signs up for multiple accounts using multiple e-mail addresses. This is not difficult due to the fact that a standard DSL account typically gives a person five e-mail accounts before it becomes necessary to start using accounts with free online services such as Yahoo!, Hotmail or Gmail. This strategy should be countered in five ways:

1. Place limits on the number of surveys that can be completed from a single IP address. This is a highly effective measure for static IP addresses. It is also a useful countermeasure for consumer DSL accounts that have dynamic IP addresses due to the fact that the user will have to log off the DSL line and reinitiate a connection before starting another survey. For panelists who are tech-savvy and understand the problem is with the IP address, the inconvenience discourages them from completing multiple surveys. For panelists who don't understand the basics of Internet technology, this will be a sufficient barrier to prevent taking a survey multiple times.

2. Asking for a mailing address to which earned rewards can be mailed after taking a number of surveys. Some unscrupulous individuals with multiple e-mail addresses and dynamic IP addresses will try to take as many surveys as possible and then try to change all accounts to the same mailing address in order to collect their rewards. When this happens, it is easy to catch and the panelist as well as all of his or her e-mail addresses and mailing addresses can be blacklisted.

3. Time-stamping each response to identify cheaters.

4. Analyze the open-end responses



es to make sure coherent, thoughtful responses were given.

5. Re-survey 10% of the respondents a week later to see if there is continuity in their answers.

Finally, a program should be put into place that collects basic demographic information from each panelist and compares that information to questions in the survey to ensure that the panelist is answering in accordance with who he or she claims to be. One commonly acceptable practice is to have a panelist begin taking a survey without telling them what it is about. The first questions will be basic demographic profiling questions that should fit with the profile they signed up with. If at any time the answers don't correspond with their original demographic profile, the survey ends and the company can review the panelist account to determine if it should be culled.

Reduce time and expense

Online panels enable an organization to significantly reduce the time and expense of research projects by eliminating people in the field, travel costs, and the wait for business-critical study results. The result of this fundamental change in panel research has also changed the manner in which companies compete. By reducing the time and cost needed to compile panel research

data organizations have been able to learn about the markets in which they participate with greater depth and frequency. As a result, organizations now have the ability to respond faster to changes in the market, which is benefiting enterprise and consumers alike.

Figure 1 shows one example of time saved for research that utilizes an online panel for a small study. Many market research studies do not require a nationally representative sample but instead require a sample of people who use a product or service. As a result, most studies want a broad demographic representation such as age, gender or geography of respondent or select group of users and potential users. For those studies that do require a representative sample of respondents, a representative audience implies that the study was able to obtain information from a pool of panelists that closely resemble the demographic composition of the most recent official census along such characteristics as age, gender, or ethnicity, per geographic region examined. This is accomplished by starting with a large and demographically diverse panel of potential respondents, then sending a pro rata percentage of invitations to each demographic group for which representation is required. The percentage of invitations should match

the percentage of this group's representation in the national census.

The last safeguard that ensures proper representation requires demographic quota cells to be defined within the survey so that only the desired number of respondents in each quota cell or demographic sub-group is allowed to complete the survey. All other respondents are locked out. Ensuring that an online panel produces a set of representative responses is a very difficult goal to achieve with a panel that is managed in-house due to the fact that these panels are usually too small to adequately represent an entire population.

When the panel is large enough to obtain a statistically relevant sample, it is very important to establish how sample was taken. Far too often organizations will use a flawed methodology and send out thousands of invites to take a survey without imposing controls to ensure that completed surveys are in fact a representative sample.

Blindly sending out thousands of requests to take a survey will never provide a representative sample because it is impossible to impose quota controls and ensure that target demographics are represented in the raw data.

Furthermore, utilizing online panels increases the complexity of obtaining a representative sample. This is due to the fact that approximately 15 percent of the population in developed countries isn't online and because young women in Canada, the U.K. and the U.S. are power users of the Internet and many have an affinity towards taking surveys for financial incentives. Therefore to obtain a representative sample, it becomes necessary to spend much more time and expense to manage the panel and invest in expensive and sophisticated software tools that allow the organization to impose and enforce sample quotas. Most organizations cannot afford the investment required to collect representative

samples, which is why many companies increasingly rely on panel outsourcing companies that are better equipped to manage and maintain the panels and software necessary for the task.

Embraced panels

Although traditional offline research is still going strong, it is clear that businesses with market research needs have embraced online panel research. For businesses competing in an increasingly global economy, one critical factor is the ability to rapidly obtain accurate information on target markets of interest. Without timely and accurate market intelligence, business decisions pertaining to the direction of a product, service or brand become a guessing exercise with no better than a 50 percent chance of success. Online panel research eliminates a lot of guessing about a market and does so faster and at less cost than traditional offline panel research methods. | Q



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Coordinate and conquer

Market research is much maligned lately. Critics are saying that today's market research produces results that are lacking in insight, synthesis and analysis. That it has become commoditized, relying on tools and techniques selected based on lowest cost. That it is mired in academic disputes over the validity of behavioral vs. attitudinal research. In fact, that it is responsible for the decline in the reputation of the entire marketing function itself.

True or not, the charges will be continually debated and discussed, but I fear that the core issues may be lost in the noise.

A fundamental fact is that quality research (of all types) is - and will continue to be - a key to successful marketing.

What has changed? Well, the world has become much more complex, competitive and fast-paced. New research tools and techniques have proliferated. Information heretofore unavailable can now be located with a few clicks of a mouse. Strategic plans must be revised constantly. Marketing methodologies are themselves evolving rapidly.

Yet most companies have been unable to leverage all the new tools to exploit their full potential to gain a competitive advantage. Why? Because they are mired in traditional views of information and research, restricted by functional boundaries and constrained by budget limitations. And when they look outside, they see service providers mired in the very same problems.

Clearly, there is an opportunity for a new research and decision-making model.

The age of information-based traditional research is over. The functionally-driven, internally-focused, one- or two-dimensional and commoditized research approach must evolve into a new form of business intelligence that can serve a more highly segmented marketplace, and is customer focused and multidimensional (which means using multiple

methodologies and resources to solve a single problem).

The new approach must use much more integrated research programs that can produce relevant data, synthesis, analysis and innovative insight. This suggests that conducting research properly is even more essential than ever before. It is also, I submit, relatively simple to do!

In today's world, a company's ability to perform successful research depends on four factors:

1. Coordinating the research functions.



By Andrew P. Garvin

Integrating research methods for greater insight and ROI

Editor's note: By Andrew P. Garvin is founder and director of Guideline Inc., a New York research firm. He can be reached at 212-645-4500.



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2. Asking the right questions.
3. Using research methodologies in a new, integrated way.
4. Establishing the right relationships with the right research partners.

Coordinating the research functions

In many companies different people in different departments are responsible for different types of research. Competitive intelligence, secondary research, the library, and quantitative survey research functions can be at different ends of the building. This no longer makes any sense.

For example, how can one conduct a survey of global consumer attitudes towards soft drinks without knowing that results of a major syndicated survey were just published in Britain? Or that two soft drink competitors in Europe are engaged in a very public fight?

Centralizing all the research functions – reporting to a key top management executive – can be a better solution, as long as it is highly responsive to the needs of its users.

At a minimum, I advise creating a research council that meets regularly and includes members from all research functions as well as representatives from marketing and top management. This will facilitate the communication necessary to conduct cost-effective research.

One of the critical roles of this council would be to bridge the gap that often exists between marketing people, research people and top management. It would also help coordinate the most typical areas of research needed.

Ask the right questions

Being able to ask the right questions depends on having an understanding of the business background, the immediate issue, problem or decision to be made, and the availability, cost and likely value of all research methodologies that can be used.

Most importantly, those who will use the research results must be active participants in formulating the questions and providing context. There should be checkpoints along the way

to ensure the research process is on track to respond to the end user's question.

Every business issue ultimately boils down to an information problem. We think we have decision problems, but in reality, if we had a sufficient amount of accurate information, all correct decisions would be indicated within that information.

In my experience, to ensure the right questions are being asked, you need:

- A very clear, specific and written description of the problem, opportunity, issue or required decision.
- An informed internal decision on what information is needed, from what sources, using what research methods. This can only be done with a group of people who know what they're talking about.
- Input from outside the company to validate and provide external perspective.

Integrated research: the nine stages to quality results

Too often, a typical approach still is, "Hey let's do a survey" or "We need a focus group" or "We need some competitive intelligence." Followed by, "Get the cheapest quote."

This approach produces the commoditized market research and lack of insight everyone is now complaining about. And it leads directly to the failure of marketing, for which market research is being blamed.

There is, however, a new way to go. It involves adopting a simple process that uses nine common research tasks, approaches and methodologies in an integrated and holistic fashion. It can be applied to virtually any research requirement, with more or less dollars spent on each segment.

While I call them stages, it is important to state that the following are not necessarily sequential steps that must all be performed for every problem. Nor do they require a separation of secondary, qualitative and quantitative research. On the contrary, the idea is to have a coordinated, holistic mix of research solutions that fluidly interrelate with each other and can be combined or separated as appropriate.

Here are the nine stages in a typical, but not required, order:

1. Find out what's out there

Begin by searching for all publicly and readily available information on the topic, using search engines, business databases, trade associations, etc.

This stage is often called secondary research, but in my view the term should be eliminated from the research dictionary. It was generally used to refer to publicly available information like what you could find in a library. But these days, what is publicly available is pretty vague and fluid. When you call the head of the relevant trade association to get his input and advice on where to find the best information, is that secondary research?

The result should be a treasure trove of background information, current data and even current thinking and analysis that, if properly organized, will:

- a. Often give you enough information to avoid spending too much on subsequent stages.
- b. Help shape the questions for the subsequent stages as well as the requests for proposals from outside suppliers.
- c. Possibly provide enough information to stop the whole project right there, or move it in a different direction.

2. Identify and buy published research reports

There are thousands of reports published every year on all kinds of industries and markets. They are usually done by knowledgeable analysts and produced by reputable companies like Frost & Sullivan, Mintel, Packaged Facts, etc.

They can be found in minutes in databases like marketresearch.com. Such databases will often provide reference to key reports on industries and companies produced by Wall Street analysts, multi-client studies and syndicated research, all of which should be included in a quality search.

At a minimum you'll get a good overview and tremendous background, enough information to save

considerable dollars on any custom research and enough insight to help formulate the questions for such further custom research. At a maximum, you'll get enough to know you should stop right there and potentially save millions.

3. Identify and contact experts

The next step is to identify and contact experts in the field. This is now very easy to do using expert network databases like intota.com, or even by searching Google using your topic of interest.

4. Synthesize results in a preliminary industry/market profile

The next stage should be to put together all the research done so far into a brief report (maybe 10-30 pages) with appropriate appendices.

This report can serve several purposes:

- a. Be a briefing for top management.
- b. Offer plans for the next research

steps, based on findings thus far.

c. Be the background document supplied to those, internally or externally, who will actually perform the more in-depth research methodologies that follow.

Now you will be ready for the type of in-depth and primary research that is required.

The next four stages can be done sequentially, independently or all together, but should definitely be integrated, with intelligence from each step feeding the others.

5. Industry, competitor and market assessment

My advice is to focus on the industry and its players first, then the marketplace.

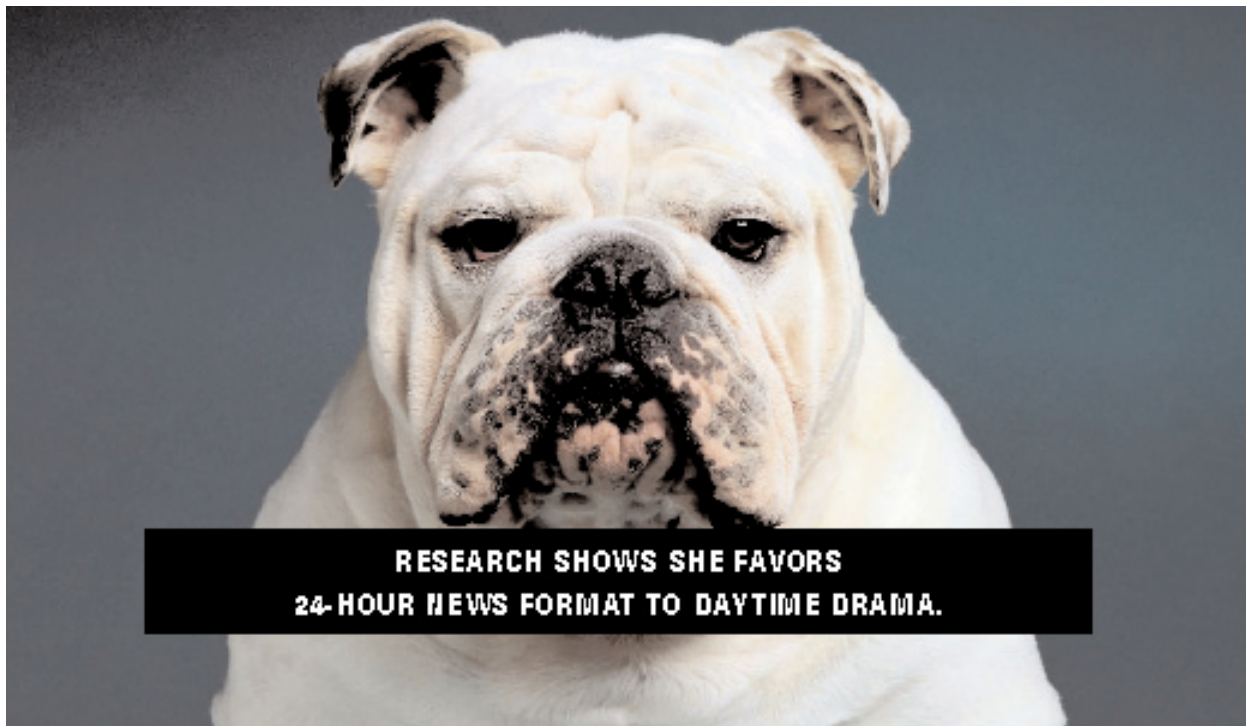
A good in-depth industry and competitor assessment will require combining secondary research with interviews of manufacturers, distributors, wholesalers and retailers, plus solid competitive intelligence obtained ethically and legally.

For trend information, it's wise - okay, essential - to set up an ongoing monitoring or tracking of both the industry and key competitors. This can be done inexpensively via alert services like NetContent's Intellisearch or Dialog's NewsEdge (to name just two). Customized tracking are also available from many research suppliers.

Once the supplier industry structure is understood, then turn to the marketplace - the consumers or end-users of the products or services produced. Again, it's necessary to use a combination of secondary research, syndicated services and panels, information from trade associations and interviews with industry players. You want to get a firm handle on the demographics and characteristics of the buyers, as well as the size of the market.

6. Product development and technology research

This is an often neglected part of a



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research effort. If you are looking at an industry or market you must know what product and technology innovations have recently occurred, and what's likely to emerge in the near future. This is especially important if you are going to survey consumers (see No. 9 below). Interviews with outside experts can be very helpful for this.

7. Benchmarking and best practices

Recently, it has become evident that an understanding of an industry or market is not enough. Successful decision-making also requires knowledge of how you're doing compares to others in the field (benchmarking) and what are the best practices out there and who is performing them.

Good benchmarking studies involve an in-depth comparison of one or more of your own practices or processes with those of competitors. Benchmarking studies can be expensive, as they will normally involve interviews with dozens of sources, including distributors,

wholesalers, retailers, industry analysts and employees.

8. Qualitative market research

The term qualitative market research is most often applied to describe the use of focus groups, so we'll adopt it here, although the term could apply to many of the stages described above.

Focus groups are an essential step in the research process because they provide an opportunity to gain special insight directly from the customers (whether consumers or business executives).

I've so often heard, "Hey let's do some focus groups." Then someone finds out the cost, and suddenly it's "Well, let's do just one." Don't. Better none than only one. My experience suggests at least three.

The reason is that the big danger of focus groups is that they can easily be dominated by one vocal participant who ends up swaying the entire group, thus producing very misleading results.

Nonetheless, the big advantage in doing focus groups is that careful listening can often yield unique insights that no one has thought of, thereby enabling a much higher ROI on subsequent surveys.

9. Quantitative market research

Now we're ready for the last - and usually most expensive - step in the process, which involves full-scale surveys with sampling that make the results sufficiently valid and projectable.

Prior to a big survey, I generally would recommend testing the field by using an omnibus survey and submitting a few key questions.

What type of survey should be done? While the current debate on the merits of attitudinal vs. behavioral research is certainly healthy, as a business and marketing person, I simply choose to do both. Effective and creative marketing programs require knowledge of what customers are actually doing as well as why they may be doing it and what that indicates for the future. In any case, as has been pointed out by others, it's not

the data itself that is so important, it's the insights that should come from people who can understand that data.

Many researchers are gravitating toward the use of Internet surveys because they are generally cheaper and faster and more convenient. True, but caution should be applied because results are potentially not projectable under most circumstances.

The right relationships with the right research suppliers

If you don't have a centralized research capability, then I submit you should no longer think in terms of individual research suppliers and begin thinking in terms of a research agency.

If the old way was to bid it out and select the lowest-cost supplier (or the one whose name is recognized by top management so results have "authority"), my reaction would be it's time to recognize there's a paradigm shift.

I suggest the new way is to develop a relationship with one or just a handful of outside suppliers, partner with them, and insist they take the time to understand your business and the current issue requiring research. Then, they should assist in guiding you through each stage in the research process, indicating how the best ROI can be achieved. A key point here is that a centralized research function working with fewer suppliers can dramatically reduce the time cost of knowledge transfer from one research step to the next.

This means interactions with research suppliers should resemble those with advertising and public relations agencies - thus the term "research agency." Relationships should be ongoing. The research-by-the-project approach would diminish in importance.

It is my prediction that while single-focus, niche research suppliers will continue to exist, larger research firms will begin to provide an integrated approach and position themselves more as agencies than suppliers.

I even think we'll soon be seeing research firms getting ongoing retainers just for maintaining a partner relationship, with individual engagements priced lower to compensate. | Q

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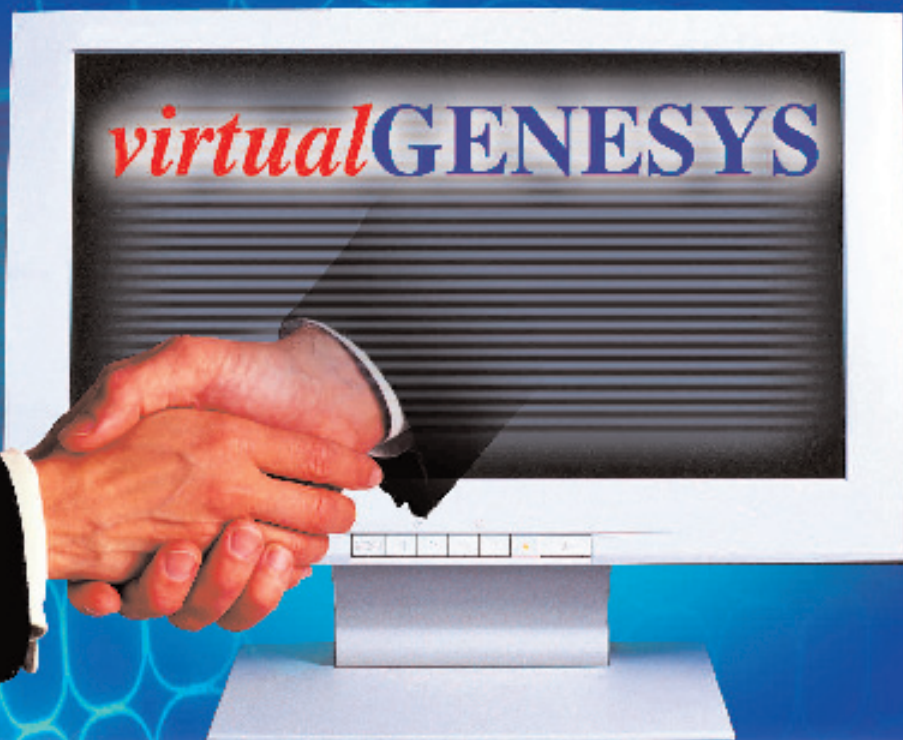
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Searching for undiscovered jewels

Research firms and companies from other verticals have been offshoring their back-office operations for many years now, especially call center work. The combination of inexpensive English-speaking labor, well-developed technical infrastructure and a wealth of subcontractors looking to service the growing outsourced call center industry have made India and the Philippines convenient and competitive locations of choice.

Yet there are other undiscovered offshoring location jewels amongst the 100+ countries of the world with native English-speaking populations. Peoples of many of these countries continue to view back-office employment, including call center positions, as career opportunities at favorable wages. Their governments and telecommunications companies are prepared to bend over backwards to make an enterprise work and work profitably. Research firms just need to know how to look for them.

In most cases, these countries are undiscovered because they don't have subcontractors offering up prepackaged solutions. As a result, research firms also need the business acumen and capital to recognize and exploit a good opportunity.

Building a subsidiary, joint venture or new firm in another country is a daunting proposition for many smaller U.S. companies.

However, it is not as overwhelming as it might seem at first blush.

Most of the technical and financial expertise required for country and site selection is identical to that for opening a similar facility domestically. It is the non-technical and management considerations that require a slightly different perspective and a high degree of anthropological savvy.

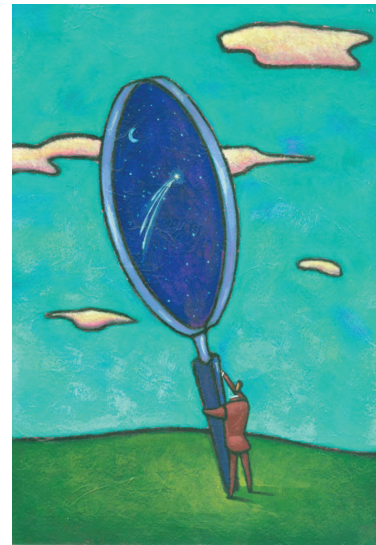
Six categories

There are six key categories to keep in mind when selecting an offshore site for your business operation. These categories apply to virtually any business, whether in the research industry or otherwise.

They are:

- normative labor and cultural practices;
- technology and infrastructure;
- business environment;
- government and legal infrastructure;

A guide to offshoring back-office operations



By Karl Feld

Editor's note: Karl Feld is vice president of Johnston, Zabor, McManus Inc., a Durham, N.C., research firm. He can be reached at kfeld@jzm.com.

Creating Connections

In this high-tech world, it's easy to forget that face-to-face interaction is still one of the best ways to learn about people's experiences and impressions. Even though technology is playing an increasing role in data collection, we know it will never replace direct conversations with customers in a focus group setting.

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- time zone.

Each of these categories has a number of important factors considered below.

- *Normative labor and cultural practices*

Perhaps the most important and often least well-examined element of starting an overseas operation is a thorough review of a prospective country's culture as it impacts labor. Employees are the heart of any business. This is especially the case for back-office functions. For an overseas operation to succeed it must understand and accommodate local labor practices in its business model from the design stages.

Naturally, the standard items examined at home should be reviewed when considering an overseas location. These include benefits, shift length, vacation, labor pool size, etc. The things to look for beyond these standards include degree of unionization and labor-based political activity. Also important is a close examination of the culturally unique relationship between wage rates and education, work behaviors and accents. For respondent- or customer-facing work, accent can be especially important and can impact assessments of labor pool size and unit cost calculations.

It is important to carefully explore the cultural norms around behaviors related to the tasks to be performed as well. Gender or class relationships to the work impact labor pool size and productivity. Some subjects are considered taboo for discussion or involvement in many cultures and might hamper your production capabilities if not carefully considered in advance. For the call center business, normative telephone behavior for people in this culture may impact labor and productivity, especially discussing sensitive subjects.

Then there are issues of trans-

portation. How do people in the appropriate income and class level get to work? Your location selection must accommodate for normative travel or you should be prepared to provide options. Second and third shifts may require special arrangements for both travel and to overcome cultural practices, especially across genders. Weather can be a significant travel factor as well, especially in countries where the practice is to shut down in heavy rains, etc.

A close examination of the hidden labor costs is required. There may be normative perks not required by law that the labor pool will demand. A careful look at informal compensation practices in this context is particularly important.

Finally, for telephone work there is also the relationship between the accent of the interviewing pool and the social norms of target respondents. Though there is little documented research on the subject, most call center operations people will attest to the positive and negative impact of various accents on cooperation rates in various respondent populations, increasing or decreasing study costs. Satisficing on the part of particular populations in response to different accents may also occur, calling into question reliability of the data collected. As a result, the impact of accent on the work to be executed must also be considered.

- *Technology and infrastructure*

Technology is the linchpin of most of today's research back-office functions. Many of the factors to consider in this category are just like those at home, including cost and redundancy of connectivity, reliability of power supply, multiplicity of vendors for all services, vendor service response time and sophistication, and lease and rental rates for equipment and office space of sufficient quality.

The unique and notable categories which will be completely dif-

ferent include the costs for connectivity service and redundancies. Experience has demonstrated that the labor versus connectivity equation is reversed in Third World locales, with the unit production cost of connectivity exceeding that for labor. This makes connectivity one of if not the most important cost factor in choosing a location. In many instances host governments have monopolies over connectivity utilities which can make service, price and redundancy problematic.

Office technologies are similar. Explore whether purchasing and servicing locally supplied equipment would be more cost effective than shipping U.S. materials to the host site. That answer isn't always clear-cut and can be confounded by issues of government tax legislation, electric current standards and service turnaround times and sophistication.

- *Business environment*

Examining the business environment of another country requires a careful look at a variety of elements beyond the standard factors considered in a domestic location. Of course a review of the number and business models of competing firms in the local job market, an examination of local transportation infrastructure and crime, and a review of success of other similar firms in the location go without saying.

Political stability and tension is an important factor to consider if the country has a national or site-specific history of unrest. It is important to consider this element in the context of the location being examined. Often the violence reported in U.S. news is localized and doesn't reflect the state of the entire country. Sometimes it does. U.S.

Consular services will often not make this distinction when providing guidance. Catastrophic occurrences are also a consideration. Putting a 365/24/7 facility in a hurricane, earthquake or typhoon zone may be a mistake.

Banking systems, insurance stan-

dards, inflation and exchange rates are also areas for consideration. While offshore businesses can provide favorable cost differentials, it is important to see how much of that difference is a result of the exchange rate. Exchange rates as well as host country inflation can also erode cost savings depending on the structure of the business chosen and how revenue is handled. Local insurance and banking standards may not provide sufficient protection or may be overly burdensome. In some cases subsidiaries or target country firms may be required to hold profits in local currencies.

Some overseas locations provide unique opportunities for financial support as well. Often tax incentives are available to foreign investors from host governments. In some cases our own government or third parties provide support, seed money or in-country services in kind to help new businesses get started.

Conversely, some locations and governments officially and legally constrain foreign businesses once established. Some allow for full repatriation of profits and repatriation of capital while others do not. Some allow for foreign majority ownership and some do not. In some locations corruption and bribery in the commercial sector is the standard in doing business. These are other factors to examine in advance.

- *Government and legal infrastructure*

Some of the best business opportunities lie in countries with the worst-designed or most restrictive government and legal infrastructure. U.S. firms need to closely examine local practices and decide what is tolerable and what is not. This category is one rife with unique things to consider.

Accounting standards vary across the globe. The target country may have accounting standards and requirements which significantly

differ from our own and will impact company accounting. Understanding the costs and benefits of compliance is important.

Data privacy laws are similar. Since most research back-office activities manipulate personal data an understanding of these laws (or lack of them) and related treaties with other countries is crucial to location selection. Some are too restrictive to make research or other personal data driven operations feasible. Others don't provide enough protection to make clients confident.

A thorough review of the legal system and its practicability is also wise. Insurance coverage maybe available, but how hard is it to enforce a claim? An examination of the degree to which government corruption pervades the legal system is important as well. For example, a government that controls the telephone company and the court system may or may not spell disaster for resolving service disputes in a



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timely fashion. A court system controlled by organized labor could prevent prosecution of employees and thus circumvent workplace discipline.

Perhaps most important is taxation. Many host governments will waive or bend taxation rules for foreign investors. Others have social systems and taxation requirements which erase the profitability of the overseas move or restrict foreign ownership to a minority constraining profit-taking.

In many countries semi-formal government bribery is a standard form of doing business. By all means understand this hidden cost in the target country and decide what is acceptable and what is not.

- *Preexisting host country network*

Having a network of native, reliable and business-savvy contacts in the target country can make the entire process of start-up more efficient. The savings in time, hidden costs due to cultural missteps and eliminating the need to support a large, in-country start-up team can be significant. In-country, joint venture partners can serve this function.

The U.S. Foreign Commercial Service (USFCS) and many host governments provide formal services designed to provide exactly this type of support, either free of charge or for a small fee. While these services tend to have “canned” programs for businesses from a particular industry, U.S. firms who take control of agenda setting can get a high return out of utilizing these services and shave months off implementation timelines. The host country services also tend to be highly politicized, so it is important to understand the interrelationships of government officials, political leaders and business interests when using these services as they may color the information received.

- *Time zone*

Often overlooked but extremely

important is the difference in time zones. Depending on the back-office function to be outsourced, time zone may be only a minor consideration or it may have a significant impact on cost and service delivery. Labor which must work second and third shift or weekends because of time differentials may require additional pay and company benefits, driving up costs. Connectivity charges may vary depending on time of day used in the host country. Conversely, it may be possible to achieve savings by using first-shift overseas labor for work traditionally requiring second- and third-shift time slots domestically. If locating in Asia is an option, businesses can take advantage of the international date-line as well and have work completed “yesterday” though it is actually done same-day. This sounds a bit confusing, but it can actually be done.

All of these factors can be subordinated as shown here.

Normative labor and cultural practices

- Work habits/behavioral norms
- Culture-task fit (sensitive subjects/gender issues)
- Vacation and absenteeism norms
- Night/weekend work habits
- Level of education associated with acceptable English skills
- Labor pool size in location
- Wage rate for target labor pool
- Unionization/political activism
- Labor legislation (benefits, shift length, vacations/holidays/sick leave)
- Normative employer behaviors

Technology and infrastructure

- Rental/lease rates in location
- Quality of available facilities at location
- Availability and reliability of local supply and repair contractors
- Cost of local supply and repair contractors
- Reliability and redundancy of power supply
- Cost of redundant power supply
- Reliability and redundancy of long distance telephone service
- Compatibility of equipment with domestic standards
- Cost of telecommunications/data service
- Historical average response time of telecommunications/data carrier to service

calls

- Number of telecommunications/ data carriers
- Government versus commercial ownership of telecommunications/ data carriers
- Bandwidth and type of Internet/ data infrastructure
- Reliability and redundancy of Internet/data infrastructure

Business environment

- Number and size of firms competing for labor in location
- Short-term historical growth of business competing for pool in location
- Reliability and nature of employee transportation in location
- Political stability and tension in location
- Historical short-term rate of catastrophic occurrence in location
- Historical crime rates in location
- Rates and nature of non-government corruption in location
- Protection/security of banking system
- Insurance standards and availability
- Historical long-term exchange rate fluctuation
- Historical short- and long-term inflation rates

Government and legal infrastructure

- Data privacy legislation
- Government corruption in business
- Insurance standards and enforcement
- Accounting standards
- Levels of business taxation
- Practices restrictive to private business
- Special legal and tax status for foreign-owned business
- Realized degree of legal protection
- Legal resources for prosecution of employees/contractors
- Restrictions on private/foreign ownership of property
- U.S. government support programs (benefits and restrictions)
- Degree of embassy/USFCS support (benefits and restrictions)
- Host government or local government involvement (benefits and restrictions)
- Degree of host or local government involvement (benefits/restrictions)
- Third-party support programs/ investment (benefits/restrictions)
- Degree of third-party involvement (benefits/restrictions)

Pre-existing host country network

Time zone

Reasoned approach

This can seem a little overwhelming. The key to successfully navi-

gating the various issues is to use a reasoned and methodological approach to narrowing options. If used as a sieve, the various categories and factors can be quite effective in taking many choices and narrowing them down to a few, highly refined options which can be explored with in-country visits. In-country visits should only be made when options for a final decision have been selected, making the in-country visit investment the penultimate action to a go/no-go decision. The six categories are used as sequential layers of the sieve ordered by their significance to the business operation(s) being considered for the location. In addition, a top layer is added to the sieve comprised of only those two or three factors deemed most important to driving the business decision to offshore. For example, a survey research call center selection model might rate labor cost and accent along with telecommunications expenses most highly, with other factors following. So in this case a sieve design as shown here might be most appropriate.

Cost of Labor, Dialect and Accent, Telecommunications Expenses
Technology and Infrastructure
Business Environment
Labor and Cultural Practices
Government and Legal Infrastructure
Time Zone
Pre-Existing Host Country Network

Undiscovered jewels

The key to finding undiscovered jewels is to put enough of the right raw material into the sieve in the first place. Many of the most unlikely places show up as viable, competitive options undiscovered by the competition when included in a sweeping review of locations with native-English speakers. With 100+ coun-

tries to choose from, there are numerous locations with untapped potential.

To highlight the extent of the opportunities, it is important to keep in mind that offshore locations, just like domestic locations, should be considered at the city, county or other appropriate labor pool level. Many countries have subpopulations of native English speakers, although the national language may not be

English. Many excellent locations are eliminated at various stages of the process if consideration is made only at the national level or limited to the capital city. Dig deeper. While this adds the complexity of considering multiple locations within each country, the undiscovered opportunities are there waiting to be uncovered by firms rigorous enough to do more than superficially scratch a country's surface. | Q

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Hmm...let me think about that

Steven J. Hellebusch's By the Numbers column in the April 2006 issue of *Quirk's* ("Total unaided awareness?") provided a good primer on the subject of brand awareness measures and some of the issues of measuring it under alternative data collection modalities - e.g., telephone or in-person interviews vs. online or mail surveys. The purpose of this article is to expand upon those thoughts and to raise several other issues which should be considered when building a tracking study questionnaire.

- *What does data cleaning do to unaided brand awareness?*

The prior column correctly explained that unaided measures are those which compel a respondent to recall a brand name on their own, without any assistance from the interviewer or questionnaire. As such, unaided questions are asked in an open-ended fashion, e.g., "What brand(s) come to mind when you think of ready-to-eat cereals?"

Hellebusch also noted that all unaided questions should necessarily be asked before one starts to probe with aided questions (such as, "Have you ever heard of a ready-to-eat cereal called Honey Nut Cheerios?") to assess total brand awareness as the sum of the unaided and aided measures.

Here's the problem or issue to be considered. When one asks an intermediary question to assess unaided advertising awareness (e.g., "What brand(s) of ready-to-eat cereals have you seen advertised in the past three months?"), that probe, by itself, is a form of aiding that will jog someone's memory to expand their recall of brands.

That is not necessarily bad. But, when data are cleaned to give unaided brand awareness credit to a brand that had not been recalled by a respondent until probed about advertising, it really changes the definition of the data. The cleaned data no longer reflect unaided brand awareness in a pure sense.

- *What do multiple mentions do to tracking sensitivity?*

Many years ago my colleagues and I observed that many survey participants tend to be lazy in answering unaided questions. While they might name two or three or four brands in a category, they



By Norman B. Leferman

Enhancing awareness tracking studies

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rarely name all of the brands on an unaided basis that they are capable of remembering. For this reason, it is not uncommon for interviewer administered questionnaires to continue probing for “Any other brands?” or “What other brands of ready-to-eat cereal can you name?”

However, despite these instructions, interviewers and respondents get tired or frustrated by these challenges and rarely result in survey

participants naming all the brands on an unaided basis that they can name.

In product categories that only have a few brands this is not a particular problem. However, for categories like ready-to-eat cereals or shampoos, there are not only dozens of brands, but there are also many line extension products (e.g., Cheerios, Honey Nut Cheerios, MultiGrain Cheerios, Frosted Cheerios, Berry Burst Cheerios, Team Cheerios, etc.).

Without good and complete interviewer probing, newer products can't be found on the unaided brand awareness radar screen at all. As such, tracking studies that are built around assessing brand progress via unaided brand awareness are doomed to failure no matter how much is being spent on advertising.

Combine this with the differential probing skills of changing crews of interviewers and it is sometimes likely that unaided awareness can go down rather than up simply because the interviewers in Wave I did a better, more complete job of probing than the interviewers administering the Wave II survey.

One solution that some researchers have adopted is to report unaided brand awareness data on a share-of-mentions basis. In so doing, any differences in probing skills are seemingly washed away. But are they?

Let's say that in results from Wave I we found that the average respondent offered the names of six brands of ready-to-eat cereals on an unaided basis, but that in Wave II the average participant only named five brands. On a theoretical basis where all people using the newest brand in the category would name it on an unaided basis, the new brand should have the same (or greater) share of mentions in Wave II as it did in Wave I.

However, if people name brands on an unaided basis with any kind of relationship to how much they have heard about brands in their

lifetime, then any new brand is at a distinct disadvantage from an unaided brand awareness perspective. So, if the Wave I group of interviewers got consumers to name more brands than the Wave II team, a new brand would have had a lesser chance to get mentioned, at all. No amount of data manipulation (e.g., analysis of share-of-mentions) can help.

- *The effects of advertising and other forms of exposure on measures of unaided brand awareness are cumulative.*


If interviewers do a great job of eliciting multiple mentions of brands from their respondents it is likely that they will get people to remember brands which may no longer be on the market. To some extent that is a direct result of the fact that the remembered brand may have been around for a long time and or supported with advertising for many years. When a new product gets introduced it must truly do something outstanding to get recognized and remembered. Even more, it must supplant an established brand from the forefront of the mind.

As such, the introduction of a new product to a very established product category must “turn the world upside down” to be mentioned in a survey, particularly if the interviewers don't do an adequate job of getting people to mention all of the brands that they can think of.

Even though there is a forgetting/decay curve for unaided brand awareness that means that people will forget brands that are not advertised or promoted, a long-established brand may continue to foster more unaided brand awareness mentions than a newcomer to the category.

- *Choose the sensitive metric and ask that question first.*

If the purpose of a tracking study is to measure progress against some goals, then the researcher would be well advised to make sure that the selected metric is both sensitive and



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meaningful.

It has been a common practice in many tracking studies to always ask questions in a certain order based on a theoretical model that trial and usage of a brand follow brand awareness. As such, many, if not most tracking study questionnaires use the following sequence:

1. Measure unaided brand awareness
 - a. Collect first brand mentioned
 - b. Probe for other unaided mentions
2. Measure brand trial
 - a. Collect brand used most often
 - b. Probe for other brands used recently (in unaided fashion)
 - c. Probe for other brands ever tried (also in unaided fashion)

It is only after those “important” data have been collected that surveys probe for advertising awareness and collect aided measures:

3. Measure unaided ad awareness
4. Probe for aided brand awareness
5. Probe for aided, ever trial
6. Probe for aided ad awareness

And, as Hellebusch noted, it is a common practice to edit responses backwards during data processing so that a brand name that has been volunteered in response to the unaided ad awareness is given credit for unaided brand awareness, even though it may have been omitted when brand awareness was being sought.

Perhaps we would circumvent some of the data editing issues and eliminate some of the cloudiness of tracking data if we simply changed the order of the questions to focus on the sensitivity.

— Let’s ask unaided ad awareness first. This would focus the respondent’s attention on what has been seen or heard advertised recently and would, thereby, deemphasize recall of brand names that have not been advertised in years. For the advertiser and their agency, putting this measure first in a survey enhances their chances of seeing the needle move.

— Let’s ask about brand usage

next. This would require that a brand that is currently being used in the home has more awareness presence than one that happens to be most prominently remembered because it has spent the most dollars on advertising over the life of the brand.

— Then, lastly, ask for unaided mentions of other brands. Since each of the foregoing questions has been asked in an open-ended fashion we have not violated our ability to come up with a true measure of unaided brand awareness and we have not pestered the respondent ad nauseam to keep naming brands. Moreover, we may have also ensured that each interviewer has done a better job of eliciting multiple brand mentions.

The following sequence would be better and more sensitive to tracking changes in the marketplace:

1. What, if any, brands of shampoos have you seen or heard advertised in the past x months? (PROBE) What other shampoos have you seen/heard advertised in the past x months?
2. What one brand of shampoo do you tend to buy most often?
3. What, if any, other brands of shampoos have you bought in the past x months? (PROBE) What other shampoos have you bought in the past x months?

4. What, if any, other brands of shampoos can you name? (PROBE) What other shampoos can you name?
5. (FOR EACH UNNAMED BRAND ASK) Have you ever seen or heard of a shampoo called (BRAND)?
6. (FOR EACH UNNAMED BRAND ASK) Have you ever bought a shampoo called (BRAND)?
7. (FOR EACH UNNAMED BRAND ASK) Do you recall seeing or hearing any advertising for a shampoo called (BRAND)?

This sequence also reduces the need for data editing.

While there are likely some purists reading this article who feel that asking the ad awareness question first might bias what respondents report to be their most-often brand, we feel that the absolute bias is more than compensated for by improved tracking data.

Moreover, if the bias is a function of increasing ad awareness, then advertisers should also be happy to see an increase in brand preference even if it does not directly translate into sales.

Taken together, we hope that the issues and suggestions raised here not only improve the sensitivity of future tracking studies, but also contribute to better interviewing and enhanced levels of respondent cooperation. | Q



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TV viewing on the rise

New York-based Nielsen Media Research reported that average American television viewing continues to increase in spite of growing competition from new media platforms and devices such as video iPods, cell phones and streaming video. During the 2005–2006 television year, which ended on September 17, 2006, traditional in-home television viewing continued to hold its own with audiences and even gained among technology-savvy teenagers.

The total average time a household watched television during the 2005–2006 television year was 8 hours and 14 minutes per day, a three-minute increase from the 2004–2005 season and a record high. The average amount of television watched by an individual viewer increased three minutes per day to 4 hours and 35 minutes, also a record. Meanwhile, during prime time, households tuned to an average of 1 hour and 54 minutes of prime time television per night, up 1 minute, and the average viewer watched 1 hour and 11 minutes, which was the same as last year.

Although teenagers typically drive the consumption and development of new media platforms, teens age 12–17 viewed 3 percent more traditional television during the full day than in the 2004–2005 television year. This increase was driven primarily by teenage girls, who increased their Total Day viewing by 6 percent. Increases among teenage girls were particularly high during early morning (6:00 a.m. to 9:00 a.m.) and late night (11:30 p.m. to 2:00 a.m.) viewing, which were up 12 percent and 6 percent, respectively.

Younger children age 2–11 also watched more television during 2005–2006, increasing their Total Day viewing levels by 4 percent. Viewing

by children increased 3 percent during prime time, 5 percent during early morning and 6 percent during late night.

During 2005–2006, African-American and Hispanic Total Day viewing levels increased 4 percent and 3 percent, respectively, with significant increases among children and teenage girls. African-American viewing among children age 2–11 and teen girls age 12–17 increased 10 percent and 9 percent, respectively, while viewing among Hispanic children and teenage girls increased 14 percent and 6 percent, respectively.

“These results demonstrate that television still holds its position as the most popular entertainment platform,” says Patricia McDonough, senior vice president of planning policy and analysis at Nielsen Media Research. “At this point, consumption of emerging forms of entertainment, including Internet television and video on personal devices seems not to be making an impact on traditional television viewing.” For more information visit www.nielsen-media.com.

Seekers of weight loss info sated by the Web

According to a study of consumers’ use of the Internet as a resource for researching weight loss information, 60 percent of those investigating weight loss now utilize the Internet to find condition-specific information, including options for healthy eating/nutrition and details on specific weight loss programs and diets. Additionally, more than half (53 percent) report visiting a Web site specifically for information on weight loss drugs.

Nearly half (43 percent) of respondents to the survey by comScore Pharmaceutical Solutions, Reston, Va., reported a high level of satisfaction with online weight loss resources. Likely a result of consumer satisfaction, many weight loss Web sites are attracting large numbers of visitors. According to data from comScore Media Metrix, three of the most popular weight loss-related Web

sites each drew more than 3 million unique visitors in July 2006: AOL Diet and Fitness (4.0 million), eDiets.com (3.2 million), and WeightWatchers.com (3.1 million).

Not surprisingly, nearly all researchers (95 percent) also utilize more traditional offline resources when researching their condition. While general weight loss information is sought both online and offline, the study found a clear distinction between the types of information that researchers prefer to receive online versus offline. The study concluded that weight loss researchers turn to the Internet when seeking information requiring very specific details and when seeking resources that engage them in managing their condition.

For example, 62 percent of weight loss researchers look for information on specific programs and diets online, while a lower 51 percent of researchers look to offline resources for this information. When seeking information on weight loss drugs, 39 percent of researchers turn to the Internet, likely a result of an abundance of TV and print ads that promise more specifics at associated Web sites. In comparison, only 24 percent of researchers use offline resources to find information on weight loss drugs. Additionally, when researchers look for details on specific treatment options, 27 percent use the Internet, while 19 percent rely on offline information sources.

More than twice as many rely on the Internet versus offline resources for weight management tools – including interactive applications such as body fat calculators and calorie counters. In fact, nearly half (46 percent) of researchers head online to take action related to their weight loss quest – utilizing tools to track their progress and chart their course, while less than half as many (22 percent) seek such information offline.

Importantly, the comScore study found online information about weight loss is important in matters of compliance and persistency. Forty-four percent of online weight loss researchers consider online informa-

tion to be extremely/very influential in helping them to stay compliant with weight loss programs. Further, nearly one-third (30 percent) found online information to be influential in helping them to stay compliant with their weight loss medication.

More than one-third (39 percent) of researchers reported that the use of online resources had influenced them to learn more about a particular drug for weight loss and 35 percent were influenced by online information to speak to a doctor about weight loss programs. More than one-quarter (27 percent) consider information found online to be influential in prompting them to speak to their doctor about a particular weight loss drug.

The study also concluded that online resources have a measurable influence on future actions. Nearly 40 percent of researchers indicated they are extremely/very likely to speak to their doctor about weight loss options as a result of weight loss information they read online. Further, 25 percent reported they were likely to specifically ask their doctor to prescribe a weight loss drug they had researched online, and 21 percent indicated they would ask their doctor to switch weight loss medication. Roughly one-third cited their likelihood to use a free coupon obtained online for a prescription weight loss medication. For more information visit www.comscore.com.

Stop the presses: newspaper Web sites contribute to audience growth

Scarborough Research, New York, has found that the online-exclusive audience of newspapers – or the audience that visits a newspaper’s Web site but does not read the printed edition – can account for 2 to 15 percent of a publication’s integrated newspaper audience – or the combined print/Web site audience. This represents a gain of hundreds of thousands of readers for many papers in larger markets.

Scarborough Research has issued a white paper on its integrated news-

paper audience metric (available for download at www.scarborough.com/newspaper-study/INA-WhitePaper.pdf). The white paper draws upon Scarborough’s newspaper audience information in the top 25 local U.S. markets and interviews with industry executives to examine the potential of online newspaper audiences. The paper identifies several key factors that contribute to audience growth online, including unique Web site content, high local-market Internet penetration, heavy cross-promotion, and integration of the Web site into the core newspaper business.

“With all of the negativity the newspaper industry has been subject to, we are pleased to report that our analysis finds a positive story headline: newspapers are successfully extending their audience online. Newspaper Web sites are attracting people that may not read the printed paper, resulting in audience growth overall,” says Gary Meo, senior vice president, print and internet services, Scarborough Research.

Scarborough introduced the integrated newspaper audience metric last year to quantify the combined local-market reach of printed newspapers and their Web sites. As more consumers turn to the Internet for news and information, newspapers continue to be focused on extending their brands – and growing their audiences – online.

“One of the most pronounced success factors that emerged from our conversations with industry executives is that integration contributes to the success of newspaper Web sites,” says Meo. “At the newspapers we spoke with, their Web sites are an integral and essential part of the business strategy to grow audience. For these newspapers, the integration of the Web site into the company’s overall business is a key factor.”

The analysis also examined the demographic characteristics of the integrated newspaper audience. Newspaper Web site audiences are educated, affluent and young, dispelling a common misperception that young people are not engaged by

newspaper content.

Integrated newspaper audience is the combined net reach of a newspaper’s weekly print and online audiences. The data in this report is from the Scarborough Local Market Studies, Release 2 2005 (12 months), in the top 25 markets. For more information visit www.scarborough.com.

Passion drives arts and crafts hobbyists

A study by Baltimore marketing firm Vertis Communications found that 34 percent of adults get involved in because they feel passionate about their projects. Vertis’ Customer Focus 2006: Arts and Crafts study also found that 22 percent of adult arts and crafts hobbyists are involved in arts and crafts because it is cheaper to make something than to purchase it at a store.

“When consumers feel passionate about their activities, they are more likely to invest time and money; marketers need to understand who these consumers are and how to approach them,” says Jim Litwin, vice president of market insights at Vertis.

In addition to finding the purchasing trends of arts and crafts consumers, the study also revealed how much consumers spend on materials. For example, hobby-item shoppers have spent approximately \$227 within the last 12 months on ceramics, sewing, knitting and woodworking materials. On the other hand, arts and crafts shoppers have spent \$170 on fabric, yarn, painting items and scrapbooking materials within the same time frame.

The Vertis Customer Focus 2006: Arts and Crafts study, which surveyed respondents via the telephone and Web, also revealed the following:

- 34 percent of women 18-34 and 33 percent of men 18-34 are passionate about their hobbies and projects, compared to 31 percent of women 35-49 and 39 percent of women 50 and older who also feel passionate about their arts and crafts projects.
- 24 percent of men 18-34 and 23 percent of men 50 and older say they

get involved in arts and crafts projects because it is cheaper to make something versus purchasing at the store.

- 32 percent of men 35-49 get involved in arts and crafts projects by assisting their children with their school, camp or group projects, compared to 30 percent of women 35-49 who also assist their children.

- 20 percent of women 18-34 have spent \$21-\$50 on arts and crafts materials including frames, fabric, yarn, paper craft products, painting items and scrapbooking in the past 12 months, while 15 percent of women 18-34 have spent \$201 or more.

- 19 percent of women 35-49 and 16 percent of women 50 and older have spent \$21-\$50 on arts and crafts in the past 12 months.

- Additionally, 12 percent of men and 12 percent of women 35-49 have spent \$201 or more on arts and crafts materials in the past 12 months.

- 10 percent of women 35-49 have spent \$101-\$200 on arts and crafts materials within the past 12 months.

According to the study, 11 percent of men 50 and older spent \$101 or more on hobby items such as ceramics and woodworking materials, compared to 2 percent of men 50 and older who have spent \$1-\$20 within the past 12 months. In comparison, 11 percent of women 18-34 have spent \$1-\$20 on hobby items within the last 12 months, compared to 7 percent who have spent \$101 or more. Nine percent of women 35-49 have spent \$21-\$50 on hobby items, compared to 7 percent of men 35-49. However, only 6 percent of women 35-49 have spent \$101 or more on hobby items within the last 12 months, while 10 percent of men 35-49 have spent the same amount in the same period. For more information visit www.vertisinc.com.

Consumers say in-store media works

As marketers seek new ways of increasing ROI by reaching and influencing consumers, in-store media becomes a viable alternative,

How Do Each Of The Following In-Store Promotions Influence You To Buy Certain Brands Or Products? (Percent Influenced Or Greatly Influenced By Media; In Rank Order)

In-Store Media	% Of 18+
Product Sample	52.4%
Product Labels	43.2%
Shelf Coupons	39.5%
Special Displays	35.5%
Store Loyalty/Card	33.1%
Coupon on Register Tape	28.4%
In-Store Events/Contests	28.1%
Parking Lot/Sidewalk Events	18.2%
Floor Graphics	12.5%
In-Store TV	10.9%
In-Store Radio	7.5%

according to the Simultaneous Media Usage (SIMM) survey by BIGresearch, Columbus, Ohio. BIGresearch surveyed 15,167 consumers in June and July 2006 and found product sampling topped the list as the most influential of in-store options, followed by reading product labels and shelf coupons. BIGresearch has been measuring the influence of In-Store media over the last four years through SIMM surveys of over 135,000 consumers.

“The store is a medium of communication. Customers consume

in-store media. They are not merely exposed. The old type of marketing was to slip in gross rating points as a surrogate for purchasing. Today consumption of media means the media has relevance and influence on a purchase decision,” says Joe Pilotta, vice president of research at BIGresearch.

“Even though in-store TV and radio trail with only 10.9 percent and 7.5 percent of respondents saying they’re influenced, it is still very significant when taking that number as part of overall weekly store traffic,” says Pilotta.

However, the figures differ when analyzed by BIGresearch’s Media Consumption Clusters. The clusters categorize consumers into eight unique clusters using media behavior only.

The message is clear: one in-store medium does not fit all. Special displays rank second with Active Explorers and fifth with Independents. Product labels are second with Independents and third with Active Explorers. The Independents’ intensity of influence is lower across the in-store media in comparison to the average consumer and the Active Explorers. For more information visit www.bigresearch.com and click on “Complimentary Top Line Findings.”

Independents vs. Active Explorers (In Rank Order)

Independents		Active Explorers	
Product Sample	42.6%	Product Sample	66.3%
Read Product Labels	36.8%	Special Displays	50.7%
Shelf Coupons	30.4%	Read Product Labels	50.3%
Store Loyalty/Card	26.1%	Shelf Coupons	49.9%
Special Displays	25.5%	Store Loyalty/Card	44.9%
Coupon on Register Tape	22.4%	In-Store Events/Contests	37.2%
In-Store Events/Contests	20.6%	Coupon on Register Tape	36.8%
Parking Lot/Sidewalk Events	13.2%	Parking Lot/Sidewalk Events	24.2%
Floor Graphics	8.9%	In-Store TV	18.2%
In-Store TV	8.2%	Floor Graphics	16.9%
In-Store Radio	5.6%	In-Store Radio	10.6%

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Product and Service Update

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teamed with Rochester, N.Y., research firm Harris Interactive and marketing and communications agency Witeck-Combs Communications Inc. to conduct a survey to examine the preferences of GLBT travelers – and to contrast their preferences with heterosexual travelers. The study will examine GLBT preferences, attitudes, spending patterns and behaviors regarding destination and recreational choices for leisure travel (domestic and international), contrasting those findings with opinions of heterosexual adults.

The study will help to identify the print, online and broadcast media sources that are influential in GLBT individuals' research and planning for leisure travel and will evaluate their awareness and attraction to gay-friendly destinations, lodging, cruise lines, airlines, car rental companies and travel providers. The national online survey will be conducted among approximately 2,000 self-identified U.S. GLBT adult travelers (ages 21 and older) who have taken at least one leisure trip within the past 12 months. In addition, another 500 U.S. general-population adult travelers will be surveyed. In addition to the lead partners, this research also is sponsored in part by the Albuquerque Convention and Visitors Bureau, Canadian Tourism Commission, Florida Keys and Key West (Monroe County Tourist Development Council), Greater Miami Convention and Visitors Bureau, Greater Philadelphia Tourism Marketing Corporation, Hilton Hotels Corporation, Las Vegas Convention and Visitors Authority, and VISIT FLORIDA. For more information visit www.tia.org.

RelevantView adds card sort to online capabilities

Research company RelevantView, Westport, Conn., has introduced RelevantView Card Sort to allow researchers to assess online how users group concepts, attributes and information together.

RelevantView's Card Sort technology enables respondents to drag and drop text, symbols, diagrams and images, grouping items into categories. Elements to be sorted, such as concepts, brands, text, images or attributes, are grouped in one area. A second area contains the categories into which items can be dragged and dropped. Categories can continually be rearranged throughout the process. Users can then be probed further using standard questions for additional insight.

RelevantView Card Sort can be used to improve concept, text and graphic ranking; display lengthy attribute lists in a user-friendly format; and perform multiple sorts in a short period of time. RelevantView Card Sort also includes magnifying glass and shuffle-through features. For more information visit www.relevantview.com.

New research unit focuses on Arab consumers

Maktoob Research is a dedicated commercial research unit from Dubai-based Internet portal Maktoob.com that will use an online consumer database to help marketers understand Arab audiences. Maktoob Research has a database of over 600,000 Arab consumers between the ages of 20–45, including thirty-something Saudi women, Emirati business professionals and young North African trendsetters. Maktoob.com's network in over 30 countries will enable Maktoob Research to execute projects in the UAE, Saudi Arabia, Kuwait, Jordan and Egypt as well as in markets that are more difficult to reach with the traditional research methods, such as Sudan, Algeria and Iraq. For more information visit www.maktoob-research.com.

Ciao panel segments respondents on media preferences

Munich-based research firm Ciao has launched a global media panel which will allow clients to target survey respondents based on their preferences for various media including

television, radio, newspapers and magazines. The media panel has been built across Ciao's global proprietary online access panels via in-depth profiling of media consumption. Profiles include frequency of media consumption by type, as well as consumption of national newspaper and magazine titles, and television and radio stations. Currently, the media consumption panel covers 21 countries: Australia, Austria, Belgium, Brazil, China, Denmark, France, Germany, India, Italy, Japan, Mexico, Netherlands, Norway, Poland, Portugal, Spain, South Korea, Sweden, Switzerland and the U.K. for more information visit www.ciao-group.com.

Two new forecasting products from ARSgroup

Research firms ARSgroup, Evansville, Ind., and BASES, Covington, Ky., have teamed to incorporate the trial-building potential of ad copy into new product forecasts. Results of the ARS-BASES research are designed to allow marketers to measure advertising's effect on new product sales prior to launch and adjust their plans accordingly. ARS-BASES' two-year joint research and development effort involved parallel testing advertising videos for a broad range of new products. Standards were applied to the design, testing and analysis to insure that the data would be useful for forecasting. The results indicated that ARS Persuasion Scores, which measure advertising's trial-building potential, can be used to adjust volume forecasts.

Separately, ARSgroup announced the launch of its ARS Impact product suite, a series of online solutions designed to help global advertisers measure a brand message's potential to drive sales and to give them clear answers as to what can make a creative message stronger. ARS Impact products evaluate advertising messages across a variety of consumer touchpoints to help companies to go to market with confidence.

The ARS Impact suite was designed to dimensionalize consumer thoughts, feelings and intended actions and provide an understanding of the sales effectiveness of brand messages in relation to past and current performance and with respect to the competition. The suite includes the flagship product ARS Impact TV as well as complementary products ARS Impact Print, ARS Impact Radio, ARS Impact Video, ARS Impact Outdoor and ARS Impact Net. For more information visit www.arsimpact.com.

Arbitron defines radio stations' suitability for beer ads; tests PPM system for tracking audiences of unencoded stations

Arbitron Inc., New York, now offers its Arbitron 21+ AQH Audience Composition Report, a Web-based audience information service providing advertisers, agencies and radio stations with ratings information that clearly defines whether the audience to a particular radio station meets the beer industry's guidelines for advertising.

The Beer Institute has established guidelines to limit beer advertising on radio to stations and dayparts on which 70 percent or more of the audience is 21 years of age and older. The Web-based system profiles the age 21+ average quarter-hour audience composition of individual stations for standard dayparts, as well as hour-by-hour.

Data for the 21+ AQH Audience

Composition Report will release at the same time as Arbitron respondent-level data. This will help beer marketers ensure compliance with the 70 percent standard and enable them to make appropriate schedule adjustments.

Any subscriber to the Radio Market Report in any Arbitron Radio Metro will have free access to the service.

Separately, the firm is field testing the addition of an audio-matching capability to the Portable People Meter (PPM) electronic ratings system which would allow the PPM to track audiences to radio stations that choose not to encode their signals. The dual-function meter is capable of identifying a radio station using two methods of detection using existing Portable People Meter hardware. First, a dual-function PPM can detect inaudible codes in the audio of stations that are equipped with the Arbitron PPM encoder. In addition, a dual-function PPM can also collect audio signatures for any radio station, which are later matched to signatures collected by an in-market monitoring system. Arbitron's current test is designed to calibrate radio listening estimates produced by audio matching to the estimates produced by the PPM encoding system for the same set of stations. Arbitron also successfully downloaded updated versions of audio-matching software into the current-generation PPMs that are in the hands of the 50 former PPM panelists who are participating in the dual-function field test. Delivered through household phone lines, the software upgrade demon-

strated that Arbitron could remotely convert encoding-only portable meters to dual-function audience meters. For more information visit www.arbitron.com.

Kinesis Survey gets an update

Kinesis Survey Technologies, Austin, Texas, has released Version 4.0 of its survey creation software. Kinesis Survey is designed to enable a market researcher to construct, launch and analyze a Web or wireless survey. This latest edition of includes new features such as: point-and-click randomization and anchoring of rotational concepts, rotational groups and nested rotations; multilingual support (including Unicode for Asian languages); a translator function for online translation and automatic insertion of programming code to foreign-language studies; crosstabulation features including customizable banners and statistical testing; batch downloading of charts and graphs to Excel; auto-programming of some types of validation; automation of some advanced JavaScript functions, such as dynamic sum; and a Survey Robot for testing conditional logic on complex surveys. For more information visit www.kinesisurvey.com.

Vertis service taps research to develop marketing campaigns

Baltimore marketing firm Vertis Communications has introduced DataDrivenDesign, an approach to targeted communications that uses market intelligence and consumer

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research to better understand purchase plans and trends. The DataDrivenDesign approach applies data gathered from Vertis Communications' proprietary research to develop targeted campaigns that speak to consumers on a personal level. Using the DataDrivenDesign approach, analysts identify consumers with the highest potential to purchase products or services by examining transaction data, geographical location, direct mail response and mailing lists. Armed with this data, Vertis Communications profiles consumers to determine high-potential habits. These consumers are further segmented into groups with similar demographics, lifestyles and behaviors. For more information visit www.vertisinc.com.

Companies team to offer panel of disabled mystery shoppers

GfK Mystery Shopping, New York, and Butler New Media, Conyers, Ga., have announced a joint venture that will provide GfK clients access to Butler's Ability Mystery Shopping Panel. Utilizing the Ability panel of disabled consumers, GfK Mystery Shopping sends a variety of disabled undercover shoppers into stores nationwide to assess customer service and sales personnel performance. Participant information on service-animal usage, disability type as well as various demographic data such as age, race, sex and marital status is available. Store evaluations are based on salesmanship, service and presentation toward these individuals. The GfK service provides companies the opportunity to determine how their employees communicate with shoppers with disabilities when these individuals are sent to specific store locations posing as customers. For more information visit www.ability-panel.com or www.gfkamerica.com.

New Web site offers consumer electronics info

Participants and subscribers to the

Arlington, Va.-based Consumer Electronics Association's (CEA) Market Activity Reports and Analysis (MARA) program will receive access to a new Web site with enhanced tools and features, such as customizable and downloadable reports, charts and access to historical data.

CEA's MARA program is a source for factory-to-dealer sales in the consumer electronics (CE) industry. The MARA program is a three-step process: first, manufacturers submit their data to CEA; second, all data is aggregated and projected to represent the total industry; third, CEA distributes total industry data to participants and subscribers. Individual company market shares are never revealed. MARA data also serves as the foundation for CEA's bi-annual industry forecasts.

Existing MARA categories include accessories, blank media, digital imaging, home and portable audio, home display technologies, mobile television technologies, video products, satellite radio and telephone. For more information visit www.ce.org or contact a member of CEA's market research staff at mara@ce.org or 703-907-7763.

Online panel comes with free survey creation software

Common Knowledge Research Services, Dallas, announced that its Your2Cents Survey Creator software is available free with use of the Your2Cents Online Opinion Panel. Powered by Kinesis Survey Technologies, Your2Cents Survey Creator is equipped with everything needed to design and program online surveys from a user's desktop or laptop without any additional hardware or prior programming experience. Survey questions and responses can automatically be generated from Microsoft Word or another text document without adding complex instructions or tags. Its menu-driven, user-friendly format accommodates complex survey designs. For more information visit www.commonknowledge.com.

Two new products from ESRI

Redlands, Calif.-based ESRI is shipping BusinessMAP Financial, a new, industry-specific version of its BusinessMAP database mapping software. Packaged with data from ESRI and datasets specifically designed for the financial services industry by RPM Consulting, a financial services data provider, BusinessMAP Financial provides a range of data and interactive features. BusinessMAP Financial, available for Windows 2000, XP Home or XP Professional, includes the following datasets: ESRI's current-year estimates and five-year projections of population, age and income; lifestyle/lifestage segmentation data from the Community Tapestry LifeMode summary groups; branch locations, assets, deposits, loan and deposit potential from RPM Consulting's BranchInfo and MarketBank data; asset, loan and other credit union data from the National Credit Union Association; Dunn & Bradstreet Business Listings; and street-level map data from North America from Tele Atlas.

With BusinessMAP Financial's data and mapping features, users can conduct ring studies, drive-time analysis and demographic analysis to: visualize where customers are concentrated relative to service locations, ATMs and competitors; understand the demographics and market potential to strategically offer products and services by market area; and query databases geographically to target mail campaigns. For more information visit www.esri.com/bmapfinancial.

ESRI also announced that its ArcGIS Business Analyst desktop software will include ESRI's 2006/2011 segmentation, demographic, business and shopping center data. This updated data in ArcGIS Business Analyst will help companies, agencies and organizations perform accurate marketing analyses faster and more efficiently.

The 2006 data updates to ArcGIS Business Analyst 9.1 will include: segmentation data from Community Tapestry down to the census-tract level; business data for approximately 11 million U.S. businesses, from infoUSA (vintage January 2006); and shopping center data for 4,200 major U.S. shopping centers, from Directory of Major Malls (vintage January 2006). For more information visit www.esri.com/ba.

Briefly

Financial services company Experian, Fort Lauderdale, Fla., is now offering Experian Research Services Online, an online market research service that integrates information from Experian's database with market data from Simmons Market Research. Experian Research Services Online accesses Experian's pool of online respondents to create online samples for market research. For more information visit www.experian.com.

Edison, N.J., research firm Schlesinger Associates has opened new qualitative facilities in Phoenix, Ariz., and Rosemont, Ill. Schlesinger Associates Phoenix is located in the Camelback region of Phoenix. Schlesinger Associates O'Hare is located five miles from the O'Hare International Airport. For more information visit www.schlesingerassociates.com.

London-based Research Now has created an online research panel of Hungarian consumers. For more information visit www.researchnow.co.uk.

The new Social Marketing research service from New York-based JupiterResearch uses best-practice analysis and consumer and executive surveys to provide marketers and site owners with recommendations on how to profit from the use of consumer-generated content, blogs, podcasts and other emerging media tools. For more

information visit www.jupiterresearch.com.

Fresno, Calif., research firm Decipher Inc. is now offering the Survey Change Management System, a hosted application for clients who want to collaboratively make edits and provide feedback to their online surveys. In addition to making text changes directly in the online survey, clients can add and view programming instructions and access previous versions of the programmed survey. For more information visit www.decipherinc.com.

London research firm EMS has upgraded its facilities, opening three new studios, including a large one capable of housing two cars or seating up to 100 respondents. The facilities include wireless Internet access and eye-tracking and are also at street level and are handicap-accessible. For more information visit www.ems.eu.com.

BuzzBack Market Research has released its newest market research report, Teen 101: Exploring Teen Lifestyles and Nutrition, the first in a new series of studies exploring the lifestyles of today's teens. Over 500 teens and young adults (ages 13-24) were surveyed about their lifestyles,

including Internet activity, text-messaging activity, exercise, diet and attitudes toward leading a healthy lifestyle. For more information visit www.buzzback.com.

State College, Pa., research firm Diagnostics Plus is now offering a free white paper, Benchmarking Loyalty, Satisfaction, Customer Security and Net Promotion Among Manufacturing Firms, on its Web site at www.diagnosticsplus.com/loyalty/. It illustrates techniques that businesses can use to assess how vulnerable or loyal their customers are, based on a study measuring customer satisfaction, loyalty and vulnerability across 65 manufacturing companies using the firm's Business-to-Business Benchmarking System (B3).

Research firm G & S Discovery, Carmel, Ind., has launched NaviGRANT, a data-filtering engine that finds, tracks and analyzes biomedical research grant trends. The subscription-based online tool uses a proprietary search algorithm to compile information on life science grants and funding trends. NaviGRANT is available via subscription. For more information visit www.navigrant.com.

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Research Industry News

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Seattle-based **Global Market Insite Inc.** has acquired **Media Intelligence**, a London interactive media survey firm.

ClickTracks Analytics Inc., Santa Cruz, Calif., has been acquired by Wilmington, Del.-based technology provider **J.L. Halsey**. Halsey will contribute to the acceleration of ClickTracks product development, marketing, sales and support capabilities. ClickTracks will operate as an indirect wholly-owned subsidiary of J.L. Halsey.

Alliances/strategic partnerships

Knowledge inForm Inc., Quincy, Mass., has partnered with Australia-based **Insight Marketing Systems (IMS)** to provide enterprise content management consulting services to complement IMS' Research Reporter, an information management software system for market research professionals. Knowledge inForm and Insight Marketing Systems will provide a complete enterprise content management implementation process. Knowledge inForm will conduct the initial information audit, aid in the software customization process and craft the software launch strategy. Insight Marketing Systems will install and customize Research Reporter, as well as consult on the software launch strategy.

Seattle-based **Global Market Insite Inc.** (GMI) and Chicago research company **Technomic** have formed a strategic alliance under which GMI will provide consumer sample for Technomic's Restaurant Occasions Ongoing Tracking program, which provides analysis on how consumers choose the restaurants they visit.

Germany-based firms **GfK MACON**, **GfK PRISMA** and **GfK Regionalforschung** have joined forces to work together under the

name GfK GeoMarketing. The four key areas at GfK GeoMarketing comprise consultancy and appraisal services, market data, digital maps and geo-marketing software. The company has approximately 80 employees.

Association/organization news

The American Marketing Association (AMA) has officially endorsed the Marketing Research Association's Professional Researcher Certification (PRC) program. AMA joins the Advertising Research Foundation, Council of Marketing and Opinion Research, Interactive Marketing Research Organization, Marketing Research Institute International and the Burke Institute as endorsers of the program.

An international jury announced the winners of four **ESOMAR** prizes at the closing session of the 59th ESOMAR Congress in September. The ESOMAR Excellence Award for the best paper presented at an ESOMAR event during 2005 and 2006 is a new award which is given to papers of the highest quality that demonstrate a concrete contribution to the decision-making process while sustaining ESOMAR's best practices. With a prize value of EUR 4,000, the award went to "The heart transplant - consumers at the heart of your business" by Kristin Hickey and Derek Leddie, the Leading Edge (Australia), and David Jenkinson, Carlton & United Beverages, Australia. The paper focused on how the traditional role of consumer research within large organizations acts as a barrier to marketing innovation, passion and the financial momentum of its brand portfolio. It proposed a new approach which replaces the traditional "brand-centric" business approach with a "consumer-centric" one.

Three awards, in different categories, were also granted to the best papers presented at the ESOMAR Congress 2006. The winners of these three awards will be added to the shortlist for the ESOMAR Excellence Award for the best paper presented at an ESOMAR event during 2006 and

2007. Worth EUR 2,500, the Fernanda Monti Award for the best paper overall at Congress 2006 went to "Cognitive neuroscience, marketing and research" by Graham Page, Millward Brown (U.K.) and Jane Raymond, University of Wales-Bangor (U.K.). This presentation addressed what cognitive neuroscience really means for marketing - assessing the relevance of cognitive neuroscience techniques such as brain imaging to market research. Academic scientists' perspectives were combined with marketing practitioners' views. The presentation also detailed the implications of key findings from cognitive neuroscience for marketing and the research industry, and discussed the role cognitive neuroscience's techniques should have in market research.

The award for best case history, carrying a prize value of EUR 1,500, went to "Playing the Egg game - increased value in the customer experience" by John Jennick, Egg (U.K.) and Gary Schwartz, FIRM, (U.K.). This paper described how Egg measures the customer experience across key moments of truth in the consumer lifecycle. The presenters demonstrated the correlation of agreement with value statements to customer satisfaction within key business functions and Egg contact centers, and how this translates to increased value to Egg's business.

Also valued at EUR 1,500, the award for best methodological paper went to: "Right here...right now...Location-specific mobile research" by Andrew Till, Flavio Souza, Japan Market Intelligence (Japan) and Steve Mele, Adidas, Japan. This presentation described a framework for the use of mobile research, supported by case studies conducted in Japan for Adidas. The approaches illustrated how mobile phones provide marketers not only with a viable survey platform but also with the means of recruiting samples at specific locations such as events in retail channels.

Samantha Marlowe, director of West Coast sales and client services for **SQAD**, a Tarrytown, N.Y., media cost forecasting firm, has been named

board member to the **Media Research Council of Los Angeles**, a non-profit organization for media professionals.

Awards/rankings

Research software firms **Perseus Development Corporation**, Braintree, Mass., and **WebSurveyor**, Herndon, Va., which were combined under a newly formed holding company funded by Austin Ventures, were selected as a winner of the CRM Rising Star award by the editors of *CRM* magazine. The prize honors the companies who are seen as "raising the bar in customer-centric solutions and initiatives." The joint company has been recognized for its efforts to gain more market share and raise industry awareness for Web survey and enterprise feedback management solutions.

Chicago-based **C&R Research** has been top rated by the first-ever Market Research Supplier Quality and Value survey, conducted jointly by Prevision Corporation and *Inside Research*. This survey taps into the opinions of corporate research buyers. The all-industry survey was conducted from January to March 2006 among senior research buyers representing more than 250 medium to large firms who rated satisfaction with their own research suppliers in 2005 based on six attributes: overall satisfaction, data quality, service quality, on-time delivery promised, relative cost and value for money. C&R Research received the highest composite score in the overall satisfaction category. Specifically, C&R Research earned the best rating in data quality, service quality and value for the money, with 100 percent of surveyed clients expressing satisfaction with C&R Research in these attributes.

Australia-based research software firm **QSR International** has been named a Microsoft Gold Certified Partner.

Seattle research firm **Global Market Insite Inc.** ranked No. 93 on the Inc. 500 ranking of the fastest-

growing private companies in the country, with three-year growth of 895 percent.

New accounts/projects

Destiny Media Technologies Inc., Vancouver, B.C., announced that Seattle research firm **Global Market Insite Inc.** will use Destiny's Clipstream Video for testing movie trailers online.

DIRECTV Inc., New York, and **TNS Media Research**, New York, have entered into an agreement to launch audience measurement services that will focus on DIRECTV interactive subscriber households. DIRECTV will use TNS Media Research's audience measurement capabilities to better understand consumer consumption of the various programming and interactive services it offers. TNS Media Research will use aggregated and anonymous clickstream data from a sample based on 250,000 DIRECTV customers to provide audience and navigation metrics on viewing and interactive activity.

Reed Exhibitions has chosen **Consumer Opinion Services**, Seattle, to conduct surveys with attendees of the Global Gaming Expo in Las Vegas on November 14-16 using a handheld PDA device.

The conferences and institutions participating in college football's Bowl Championship Series have extended their contract with **Harris**

Interactive, Rochester, N.Y., for four years. The agreement, which goes

through the 2010 BCS bowls, keeps the Harris Interactive College Football Poll as part of the BCS Standings for the next four seasons. The Harris Poll made its debut last season. This year's BCS Standings will include the Harris Interactive College Football Poll, USA Today Coaches' Poll and six computer standings - Jeff Sagarin, Anderson and Hester, Richard Billingsley, Colley Matrix, Kenneth Massey and Dr. Peter Wolfe.

New companies/new divisions/relocations/expansions

The principals of seven consulting firms in Europe, North America and Latin America have formed a group consultancy, **gravitas**, which offers specialist consulting advice, coaching and mentoring to senior management in market research companies. The new group has offices in the United States (Connecticut, New York, New Jersey and Arizona), the United Kingdom (London), Germany (Hamburg) and Argentina (Buenos Aires) and plans to add partners in Asia-Pacific in the near future. Member firms are: **Cambiar**, **Transition Strategies**, **Lev & Berlin**, meaning **ltd.**, **Bill Pegram & Co.**, **synygis ltd.**, **Watermann Agens GmbH** and **JGG Consulting**. Personnel includes: Simon Chadwick, William "Jay" Wilson, Lock Collins, Steve Sherrill, Michael Mitrano, Duane Berlin, Tim Macer, Bill Pegram, David Cahn, Lars Watermann and Jorge García-González. The group's Web site is www.gravitas-partners.com.

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Researcher Angus Reid has opened **Angus Reid Strategies**, a full-service strategic market research consultancy that will emphasize the use of online research solutions. The company recently opened offices in Vancouver, Calgary and Toronto and expects to open U.S. offices in the coming months. Reid's venture will use the software technology of sister company Vision Critical.

Tulsa, Okla., research software firm **StatSoft** has opened an office in Oslo, Norway.

Technology market research firm **ABI Research** has opened a new Asia-Pacific regional headquarters in Singapore.

Stamford, Conn.-based **FocusVision Worldwide** has opened a Chicago-area office in Buffalo Grove, Ill., to provide sales and technical support.

London research firm **ToLuna PLC** has opened a New York office. The new office will act as the hub of U.S. and Canadian operations be headed by Holly Williams, who has been named general manager, ToLuna North America.

London-based **Research Now** has opened a San Francisco office and expanded its New York office. The San Francisco office will act as Research Now's North American service delivery hub with the team both selling and delivering services in the Pacific time zone.

Research book publisher **Paramount Market Publishing Inc.** has moved to 950 Danby Road, Suite 136, Ithaca, N.Y., 14850.

Company earnings reports

Paris-based research firm **Ipsos** reported first-half 2006 revenue of EUR 407.7 million, an increase of 26.7 percent on the first half of 2005.

Harris Interactive, Rochester, N.Y., released its financial results for

the fiscal fourth quarter and fiscal year ended June 30, 2006. Revenue for the fourth quarter of FY2006 set a new record of \$60 million, up 11 percent when compared with \$54.2 million of revenue from the same period a year ago. U.S. revenue was \$46.8 million, up 11 percent from \$42.3 million reported for the FY2005 fourth quarter. European revenue was \$13.2 million, up 11 percent from the \$11.9 million of revenue reported for the same period a year ago. Unfavorable foreign currency exchange rates had a negative impact of \$0.1 million on revenue for the quarter.

Global Internet revenue for the fourth quarter of FY2006 was \$33.9 million, up 11 percent from last year's fourth quarter Internet revenue of \$30.5 million. U.S. Internet revenue was \$30.2 million, up 11 percent when compared with \$27.1 million in the fourth quarter of FY2005. European Internet revenue was \$3.7 million, up 7 percent from the \$3.4 million of Internet revenue reported in the same period last year. For the quarter, Internet revenue comprised 56 percent of consolidated revenue, 64 percent of the U.S. revenue and 28 percent of the European revenue.

Operating income for the fourth fiscal quarter of 2006, which included \$1.4 million of restructuring and non-cash stock-based compensation costs, was \$4.2 million or 7 percent of revenue, up 47 percent when compared with operating income of \$2.9 million, or 5.3 percent of revenue last year. Operating income for fourth fiscal quarter of 2005 included \$1 million in restructuring and severance but did not include any stock-based compensation costs.

Net income for the quarter increased 189 percent to \$3.3 million, or \$0.05 per diluted share, as compared with net income of \$1.2 million, or \$0.02 per diluted share for the fourth quarter of fiscal 2005. Sales bookings for the quarter were \$47.9 million, flat with the \$47.8 million booked in the same period a year ago.

Revenue for the fiscal year ended June 30, 2006 was \$216 million, up 10 percent from the \$197 million of revenue reported in fiscal year 2005. U.S.

revenue was \$170.1 million, up 13 percent from the \$149.9 million a year ago. European revenue was \$46 million, down 1 percent compared with \$46.5 million in fiscal 2005. Unfavorable foreign currency exchange rates had a negative \$1.8 million impact on revenue for the fiscal year.

Global Internet revenue for fiscal year 2006 was \$125.4 million, up 15 percent from last year's \$109.3 million. U.S. Internet revenue was \$112.2 million, up 15 percent when compared with the \$97.7 million in fiscal 2005. European Internet revenue was \$13.2 million, up 14 percent from \$11.6 million in fiscal 2005. For the full fiscal year, Internet revenue comprised approximately 58 percent of consolidated revenue, 66 percent of U.S. revenue and 29 percent of European revenue.

Fiscal year 2006 operating income, including restructuring, severance and non-cash stock-based compensation costs of \$3.7 million, was \$14.3 million, or 6.6 percent of revenue, up 58 percent when compared with operating income of \$9 million, or 4.6 percent of revenue for the last fiscal year. Fiscal year 2005 operating income included \$2.8 million of restructuring and severance, but did not include any stock-based compensation costs.

Net income for the fiscal year was \$9.5 million or \$0.15 per diluted share, up 498 percent when compared with net income of \$1.6 million (including a \$3 million mostly non-cash loss from discontinued operations), or \$0.03 per diluted share for fiscal 2005. Total sales bookings for fiscal 2006 were \$218.6 million, up from the \$184.1 million of sales bookings reported in FY2005.

London-based **TNS** reported results for the six months ended June 30, 2006. Revenue was £480.5m, up 4.5 percent from 2005. The adjusted operating profit was £41.7m. Adjusted earnings per share were 4.9 pence.

Aegis unit **Synovate** reported first-half 2006 revenues of £182.3 million, up 25.9 percent from the first half of 2005. Profit grew by 27.6 percent to £118.5 million.

Names of Note

continued from page 10

and **Dana Stanley** have been named vice president of client development. Five additional U.S. team appointments were announced: **Clare McHatton** (client development manager, relocated from Research Now's London office to San Francisco), **Matt Dolen** (client development manager, San Francisco), **Heather Radcliffe** (client development manager, New York), **Liz Bull** (project manager, relocated from Research Now's London office to New York) and **Ted Truong** (project executive, San Francisco). In the London office, **Chris Dubreuil** has been named client development director, and **Paul Botje** chief operating officer, along with other new recruits to the London team, including client development managers **Viktor Bergh**, **Nicky Robertson**,

Amber Murphy and **Lindsay McLaughlin**.

TVG Marketing Research & Consulting Dresher, Pa., has named **Lana Limpert** vice president and a member of its qualitative research team.



Limpert

Zalesky

Chet Zalesky, founder and president of Atlanta research company CMI, has been named to *Catalyst* magazine's 2006 Top 50 Entrepreneurs Portfolio. Business professionals in the Catalyst Top 50 are recognized as those who are

leading Atlanta's best-performing small to mid-sized companies with 2005 revenues between \$5 million and \$200 million.

Mary Shea has been appointed general manager of sales to head Chicago research firm *Mintel Group's* U.S.-based sales and client services teams and oversee *Mintel's* subscription business in the Americas.

Maritz Research, St. Louis, has named **Mark Rein** director, strategic consulting, for the retail group.

Lulu Intan has joined Jackson, Miss., marketing firm *Godwin Group* as senior marketing research analyst.

Carlson Hotels Worldwide, Minneapolis, has named **Kevin Hanstad** vice president of customer research and insights.

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The newly merged *Perseus Development Corporation* Braintree, Mass., and *WebSurveyor* Herndon, Va., announced additions to its management team. Joining the company in new roles are **Andrew Keenan**, chief financial officer; **George Kanuck**, senior vice president of sales; and **Su Doyle**, chief marketing officer.

Los Angeles-based housing provider *Oakwood Worldwide* has named **Rebecca Tann** vice president of marketing. Marketing research will be among her new responsibilities.

London-based research firm *TNS* has named **Michelle Griffin** regional human resources director for its Asia-Pacific, Latin America, Middle East and Africa region.

MORPACE International Inc., Farmington Hills, Mich., has named **Lisa Berry** vice president.



Berry

Morawski

Vancouver research firm *Angus Reid Strategies Corporation* has named **Ed Morawski** president. He will be based in the Toronto office.

Arby's Restaurant Group Inc., Atlanta, has named **Cheryl Barre** chief marketing officer for Arby's and president of Arby's Franchise Association. Barre will lead all strategic brand marketing efforts including consumer insights and research.

Portland, Ore., research firm *Doxus* has named **Dale Schreiner** and **Thomas Hoover** research directors.

Houston-based insurance firm *AIG American General* has named **David O'Leary** executive vice president of strategic marketing and business development. Marketing research will be among his new responsibilities.

Boston research firm *Reactions & Opinions Inc.* has named **Jim Caro** senior vice president of marketing and sales.

Jeff Spitzer has joined *Universal Survey Center*, New York, as senior account executive. He is based in the firm's new Portland, Ore., office. Senior Account Executive **Ashley Bowden** has relocated to the firm's new Tampa, Fla., office.

At the Naperville, Ill., *Millward Brown* office **Cindy Akins** has been named vice president, North American human resources, and Heath Greenfield has been promoted to vice president. **Tim Kelsall** has joined Millward Brown North America, New

York, from the London office as vice president, copy testing and creative development.

Netherlands-based information firm *VNU Group B.V.* has named **David L. Calhoun** chairman of the executive board and CEO.

Gongos Research, Auburn Hills, Mich., has named **Katherine Ephlin** senior project director.

New York research firm *TNS* has named **Rob Wengel** executive vice president, client services, and **Nancy Narraway** corporate vice president, marketing.

Montreal-based *Voxco* announced that President and CEO **Mario Mrvica** is leaving the company. Founder **Raymond Cyr** has been named CEO and **Louis Lessard** has been named chairman of the board and CFO.

The Life Cycle Institute of the Catholic University of America, Washington, D.C., has named **John Zogby** as its first senior fellow. Zogby is president and CEO of Washington, D.C., research firm *Zogby International*.

New York research firm *Questus* has added several new employees: **Rebecca Hill** and **Melissa Moorcroft** have been named account director. **Jefferson Mayfield** and **Maria Navarro** have been named project manager. **Craig Gottlieb** and **James Testa** have been named director of business development.

Media, Pa., research firm *ICR* has named **Edward J. Hass** vice president advanced research methods and named **David F. Ireland**, **Roberto A. Fois**, **Melinda B. Shorr** and **John DeVries** vice president client services.

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2006

Research Panels



Directory

Welcome to the second annual directory of research panels. This directory was compiled by contacting those firms we identified as having research panel services. The directory contains 150 firms, who collectively offer over 330 panels. The company listings, which begin on the next page, include the company's contact details, as well as a roster of the panels they have available. For most firms we have included the size of the panel as well as how they survey the panel members (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 124, lists the name of the panel and company and the page number where the contact information can be found.

Do you know of a panel that is not listed? Please e-mail Steve Quirk, steve@quirks.com, to have it added to our database.

Copyright 2006 Quirk's Marketing Research Review

Codes

To search for panels by industry or audience, please use the cross-index section on page 124.

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

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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
 James Sotzing, President
 Panel Titles:
 Affordable Samples Online Business Panel
 Size: 900,000 Type: Online
 Affordable Samples Online Consumer Panel
 Size: 2,000,000 Type: Online

The OTHER, better value sampling company in Connecticut, founded in 1991, providing representative online consumer (2.0M) and business (900K) 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 opposite page)

all global

Zetland House
 5-25 Scrutton Street
 London EC2A 4HJ
 United Kingdom
 Ph. 44-20-7729-1400
 info@allglobaltd.com
 www.allglobaltd.com
 Eva Laparra, Director
 Panel Titles:
 All Global Online
 Size: 75,000 Type: Online

Amplitude Research, Inc.

One Boca Place
 2255 Glades Rd., Suite 324A
 Boca Raton, FL 33431
 Ph. 877-225-7950
 sales@amplituderresearch.net
 www.amplituderresearch.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@amrinteractive.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.

(See advertisement on p. 71)

Authentic Response

A Div. of Return Path, Inc.
 304 Park Ave. S., 7th Floor
 New York, NY 10010
 Ph. 212-905-5500
 jeff.mattes@authenticresponse.net
 www.authenticresponse.net
 Jeff Mattes, Vice President
 Panel Titles:
 Authentic Response Panel
 Size: 4,000,000+ Type: Online

AutoPacific, Inc.

2991 Dow Ave.
 Tustin, CA 92780-7219
 Ph. 714-838-4234
 dhall@autopacific.com
 www.autopacific.com
 Panel Titles:
 AutoPacific Vehicle Owners Panel
 Size: 7,500 Type: Online

B&N Marketing PanelWizard BV

Westerkade 15-5
 9718 AS Groningen
 Netherlands
 Ph. 31-50-3171-777
 info@bnmarketing.nl
 www.bnmarketing.nl

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

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: 16,000 Type: Online
 LatinoEyes.com
 Size: 5,000 Type: Online
 Omnibus
 Size: 16,000 Type: Online
 TeensEyes.com
 Size: 10,000 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

Canadian Viewpoint, Inc.

Hillcrest Mall
9350 Yonge St., Suite 206
Richmond Hill, ON L4C 5G2
Canada
Ph. 905-770-1770 or 888-770-1770
info@canview.com
www.canview.com
Panel Titles:
Canadian Viewpoint Consumer Panel
Size: 140,000+ Type: Online
Canadian Viewpoint Physician Panel
Size: 5,000 Type: Telephone, Online

CarbonView

1061 E. Indiantown Rd., Suite 300
Jupiter, FL 33477
Ph. 866-340-7204
justineo@carbonview.com
www.carbonview.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
CarbonView Panel
Type: Online

**ChildResearch.com**

175 N. Main St.
Branford, CT 06405
Ph. 203-483-4301
info@childresearch.com
www.childresearch.com
Steve Burch, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Childresearch.com Panel
Type: Online

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(See advertisement on p. 52)

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
Size: 800,000
Ciao's Health Panel

Circle 1 Network

131 W. Seeboth St.
Milwaukee, WI 53204
Ph. 414-271-5437
sally.schmidt@circle1network.com
www.kidscom.com
Sally Schmidt, Research Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
Kidscom Club
Size: 450,000 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

ClickIQ

820 Minnesota Center
7760 France Ave. S.
Bloomington, MN 55435
Ph. 952-224-0810
greigm@clickiqinc.com
www.clickiqinc.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
ClickIQ Consumer Panel
Size: 500,000 Type: Online
ClickIQ Small Business
Size: 25,000 Type: Online

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To search for panels by industry or audience, please use the cross-index section on page 124.

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

**Common Knowledge Research Services**

16200 Dallas Pkwy, Suite 140
 Dallas, TX 75248-6897
 Ph. 800-710-9147 or 972-732-7323

getinfo@commonknowledge.com

www.commonknowledge.com

Steven R. 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+ Type: Online

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+

Your2Cents Small Business Owners

Size: 150,000+ Type: Online

Your2Cents VideoGamers

Size: 120,000+ Type: Online

Your2Cents4Teens

Size: 60,000+ Type: Online

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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 Pulse, Inc.

725 S. Adams Rd., Suite 205
 Birmingham, MI 48009
 Ph. 800-336-0159 or 248-540-5330

cpi@consumerpulse.com

www.consumerpulse.com

Richard Miller

Proprietary Panel Mgmt.: Yes

Panel Titles:

Consumer Pulse Online - Blended Consumer Panel

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

Proprietary Panel Mgmt.: Yes

Panel Titles:

PharmaField Research

Size: 100,000 Type: Online

The Consumer Research Panel

Size: 75,000 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

Consumerscan International

Integra

1681 Chestnut St., Suite 310

Vancouver, BC V6J 4M6

Canada

Ph. 604-731-2600

info@integrate.ca

www.consumerscan.ca

Panel Titles:

ConsumerScan

Size: 70,000

Creative Marketing Research Ltd.

Pegasus 9, Orion Court

Great Blakenham

Ipswich, UK IP9 0LW

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

Specialists Respiratory Nurses Panel

Cross-Tab Marketing Services

171-B, Mittal Tower, 210 Nariman Point
 Mumbai 400021

India

Ph. 91-22-22022043

sales@cross-tab.com

www.cross-tab.com

Ashwin Mittal, Director

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

CyberEdge

407 Martin Luther King Jr. Way

Oakland, CA 94607

Ph. 510-419-0800

webmaster@cyberedge.com

www.cyberedge.com

Panel Titles:

VizSim/VR Vendors Panel

Datatelligence Online

(A Div. of Cunningham Research Group)

3 Signal Ave.

Ormond Beach, FL 32174

Ph. 386-677-5644

panel@cunninghamresearch.com

www.datatelligence.com

Panel Titles:

Datatelligence Online

Size: 500,000 Type: Online

Datatelligence Consumer Package Goods

Size: 500,000 Type: Online

Datatelligence Pre-Recruit

Size: 100,000 Type: Telephone

Datatelligence Teen & Youth Panel 12-24

Size: 200,000 Type: Online

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and reporting

Decipher, Inc.

5250 N. Palm Ave, Suite 220

Fresno, CA 93704

Ph. 800-923-5523

sales@decipherinc.com

www.decipherinc.com

Proprietary Panel Mgmt.: Yes

Decipher is a marketing research service provider specializing in online survey programming, and data collection and management efficiencies.

(See advertisement on p. 47)

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jthomas@decisionanalyst.com
www.decisionanalyst.com
Jerry W. Thomas, President/CEO
Proprietary Panel Mgmt.: Yes
Panel Titles:
American Consumer Opinion®
Size: 6,000,000 Type: Online
Contractor Advisory Board
Size: 25,000 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: 125,000

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, technology advanced, 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. 99)

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+

Dialego AG Market Research Online

Friedrichstrabe 69-71
52070 Aachen
Germany
Ph. 49-241-978-280
info@dialego.de
www.dialego.de
Proprietary Panel Mgmt.: Yes
Panel Titles:
Dialego German Access Panel
Size: 1,000 Type: Online
Dialego UK Access Panel
Size: 65,000 Type: Online

Digital Research, Inc.

201 Lafayette Center
Kennebunk, ME 04043-1853
Ph. 207-985-7660
jane.mount@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


DM2-DecisionMaker®

2000 Clearwater Drive
Oak Brook, IL 60523
Ph. 800-323-4958
info@dm2decisionmaker.com
www.dm2decisionmaker.com
Proprietary Panel Mgmt.: yes
Panel Titles:
Expert DecisionMaker Panels

DM2-DecisionMaker® (DM2), a division of Reed Business Information, has formed a strategic alliance with Harris Interactive Service Bureau (HISB), a division of Harris Interactive® (Nasdaq:HPOL), to co-develop new B-to-B online expert decision maker panels. HISB's extensive online research expertise empowers DM2's database of millions of sourced professionals in more than 25 industries - including manufacturing, information technology, electronics, construction, financial services and life sciences - to deliver the best source for quality online business research. (See advertisement on p. 103)


DMS Research

1305 S. State Hwy. 121, Suite 290
Lewisville, TX 75067
Ph. 800-409-6262
DMSemail@aol.com
www.dms-research.com
Panel Titles:
Auto Research Panel
Type: Online
B2B Insights Forum
Type: Online
Opinion Place
Type: Online
SurveySpree
Size: 1,500,000 Type: Online
Tu Opinion Latina (Hispanic Panel)
Size: 24,000 Type: Online
Wired Panel

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. 57)

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
Hank Parish, VP Sales
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

Embrain.co.,ltd

7th Floor, Ilheung Building
126-1 Chungmuro 4GA, Chung-Gu
Seoul 100-014
South Korea
Ph. 82-2-3444-4000
webmaster@panel.co.kr
www.embrain.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Embrain Panel
Size: 200,000 Type: Online

E-Poll Market Research

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 Kalaniewai 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. 800-20-EMAIL
info@e-rewards.com
www.e-rewards.com/researchers
Kurt Knaption, Executive Vice President
Proprietary Panel Mgmt.: Yes
Panel Titles:
e-Rewards B2B Panel
Size: 1,000,000 Type: Online
e-Rewards Consumer Panel
Size: 2,400,000 Type: Online

e-Rewards Research, Inc. (ERI), the online sample quality leader, provides the highest level of service through its 2,400,000+ 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 on opposite page)

e-Rewards. The leader in online panel quality.

As a quality leader, e-Rewards Market Research can help you maximize the value of e-research. We offer 15 points of quality that set our panels apart, including industry-leading response rates, better panel retention, an invitation-only membership and the most segmentation options available. Our panels are proven to perform. e-Rewards Market Research. Put our commitment to quality to work for you.

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- 40+ business profile dimensions
- Balanced representation
- 25-35% survey response rates
- Quick, dependable delivery



The industry's most responsive consumer panel.

e-Rewards Consumer™ Panel

- Over 2 million consumers
- 300+ profile dimensions
- Exceptional targeting ability
- Normalized sampling
- Low-incidence study delivery
- 15-25% survey response rates
- Fast and accurate results



For more information on e-Rewards Market Research or for a custom quote, visit e-rewards.com/researchers or call 1-888-20-EMAIL today!



Codes

To search for panels by industry or audience, please use the cross-index section on page 124.

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

eSample Solutions

(U.S. & Canada Headquarters)
 Suite A - 1221 Elevator Road
 Saskatoon, SK S7M 3X1
 Canada
 Ph. 306-931-0984
 info@esamplesolutions.com
 www.esamplesolutions.com
 Brad Hogan, Sr. Internet Sample Cnslt.
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 eSample B2B Panel (U.S./Canada)
 Size: 3,000,000+ Type: Telephone, Online
 eSample Consumer Panel (U.S./Canada)
 Size: 14,000,000+ Type: Online
 eSample Healthcare Patient Panel
 (U.S./Canada)
 Size: 500,000+ Type: Telephone, Online
 eSample Hispanics
 Size: 100,000+ Type: Telephone, Online
 eSample International Panel (200+ Countries)
 Size: 7,000,000+ Type: Mail, Telephone, Online
 eSample IT Professionals
 Size: 100,000+ Type: Telephone
 eSample Medical Professionals Panel
 (U.S./Canada)
 Size: 200,000+ Type: Telephone, Online
 eSample Speciality Panels
 Size: 1,000,000+ Type: Telephone, Online
 eSample Youth & Teens
 Size: 500,000+ Type: Online



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)

Facts International Ltd.

Facts Centre, 3 Henwood
 Ashford, Kent TN24 8FL
 United Kingdom
 Ph. 44-123-363-7000 or 800-1695343
 facts@facts.uk.com
 www.facts.uk.com

FGI Research

400 Meadowmont Village Circle, Suite 431
 Chapel Hill, NC 27517
 Ph. 919-929-7759
 info@fgiresearch.com
 www.fgiresearch.com
 Heather Woodward
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 SmartPanel for Businesses
 Size: 500,000 Type: Online

Field Work Scandinavia

Boks 9143, Gronland
 Christian Krohgs gate 1
 0133 Oslo
 Norway
 Ph. 47-22-95-47-00
 info@fieldwork.no
 www.fieldwork.no

FirstHand Research

20199 Logging Creek Trail
 Grantsburg, WI 54840
 Ph. 715-488-2237
 bmorrow@firsthandresearch.com
 www.firsthandresearch.com
 Proprietary Panel Mgmt.: Yes

**Focus Forward**

1717 Swede Rd., Suite 203
 Blue Bell, PA 19422
 Ph. 610-279-8900
 www.focusfwd.com
 Panel Titles:
 Focus Forward Online Panel
 Type: Online

Focus Forward Online has the national panel for your next project. By using a double opt-in method of acquiring panelists, we guarantee the integrity of the Focus Forward Online Panel. Our panelists are excited to be part of your study and share their views! (See advertisement on p. 89)

Focus on Food

6679 Peachtree Industrial Blvd., Suite M
 Norcross, GA 30092
 Ph. 770-300-0168 or 888-300-0467
 cari@focusonfood.com
 www.focusonfood.com
 Proprietary Panel Mgmt.: Yes

Focus World International, Inc.

146 Hwy. 34, Suite 100
 Holmdel, NJ 07733
 Ph. 732-946-0100
 gary@focusworldint.com
 www.focusworldinternational.com
 Proprietary Panel Mgmt.: Yes

Focusscope, Inc.

1100 Lake St., Suite 60
 Oak Park, IL 60301
 Ph. 708-386-5086
 krooney@focusscope.com
 www.focusscope.com

Gang & Gang, Inc.

Resonance Research
 209 Essex St. on Derby Square
 Salem, MA 01970
 Ph. 978-740-4474
 lduncan@gang.net
 www.gang.net
 Leanne Duncan
 Panel Titles:
 Resonance Online Household Panel
 (U.S./Canada)
 Size: 250,000 Type: Online



sample
 panels
 research

Since 1995, researchers have called on Esearch.com for their online panel needs

Esearch.com, Inc.
 online fielding support for research
 esearch@esearch.com
 http://www.esearch.com
 310.265.4608



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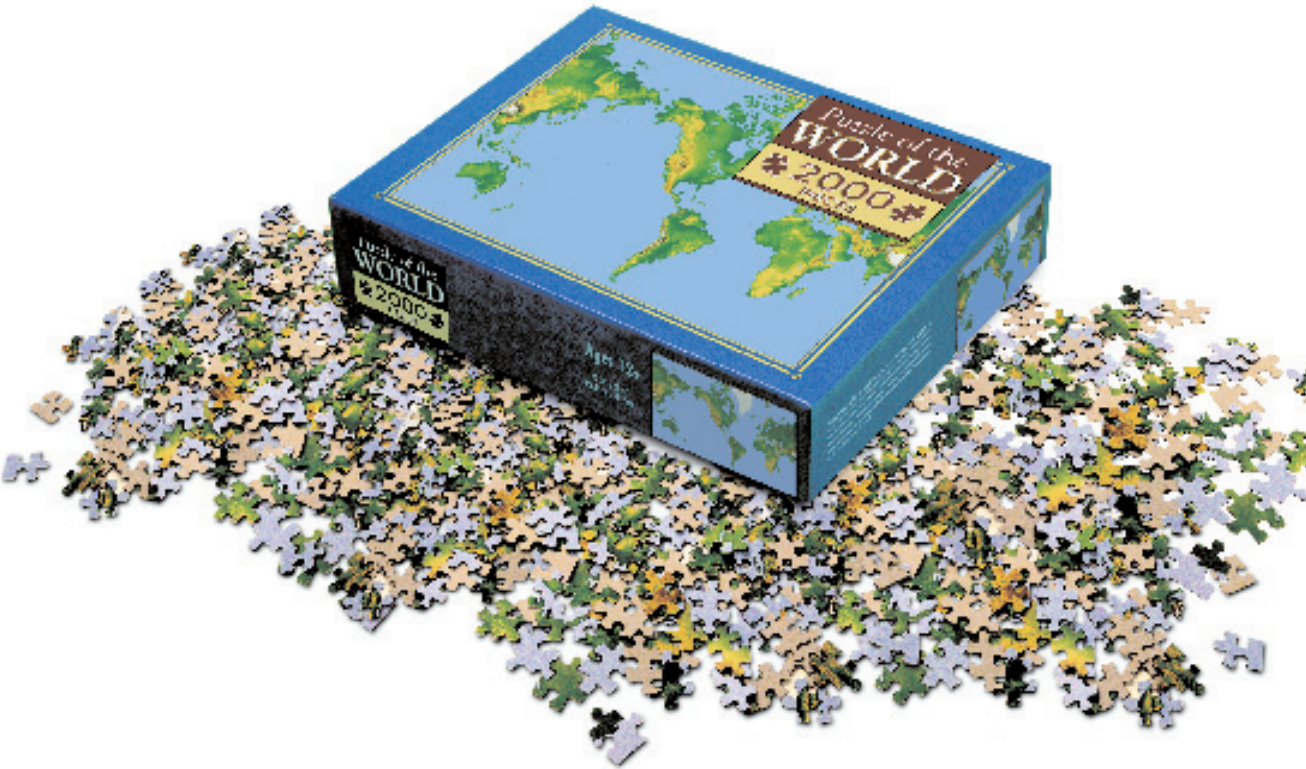
Expert
DecisionMaker
Panels™



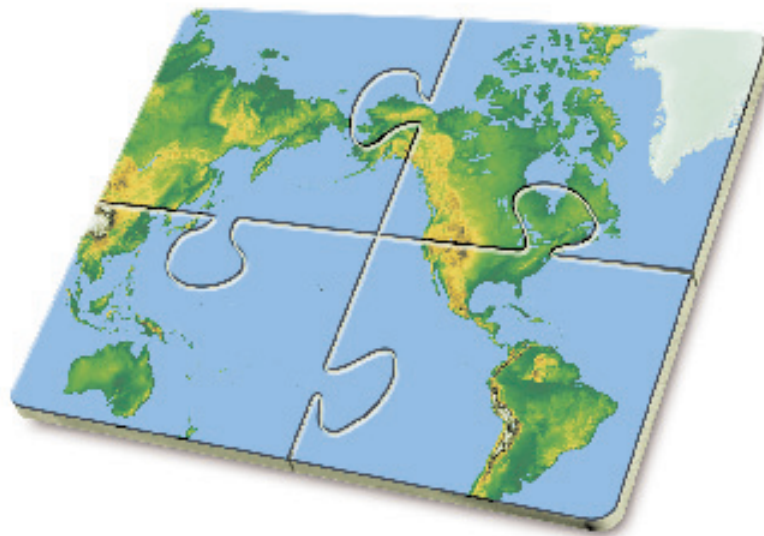
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www.dm2decisionmaker.com

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1 866 296 3049
www.greenfield.com



Codes

To search for panels by industry or audience, please use the cross-index section on page 124.

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/Dec. Makers
 Size: 25,000+ Type: Online
 Your2Cents Online Opinion Panel
 Size: 3,750,000 Type: Online
 Your2Cents Physicians/Health Care Prof.
 Size: 500,000+
 Your2Cents Small Business Owners
 Size: 150,000+ Type: Online
 Your2Cents VideoGamers
 Size: 120,000+ Type: Online
 Your2Cents4Teens
 Size: 60,000+ Type: Online

Quality research never relies on a "one-size-fits-all" approach. Recognizing the variation in quality and coverage of the Internet resources available, we've assembled a number of "best-in-class" approaches - whether it's household panels, youth panels, minorities, or other targeting variables - and utilize our time-honored, multi-sourced approach to provide a solution tailored to your particular Internet project.

(See advertisement on p. 71)

GfK NOP LLC

75 Ninth Ave., 5th Floor
 New York, NY 10011
 Ph. 212-240-5403
 info@gfkamerica.com
 www.gfkamerica.com
 Panel Titles:
 NOP Consumer Online Panel
 Type: Online

Globalpark GmbH

Kalscheurener Str. 19A
 50354 Hurth
 Germany
 Ph. 49-2233-7933-6
 uleinert@globalpark.de
 www.globalpark.org.uk

**GMI (Global Market Insite, Inc.)**

2835 82nd Ave. S.E., Suite S100
 Mercer Island, WA 98040
 Ph. 206-315-9300
 info@gmi-mr.com
 www.gmi-mr.com
 Sean Case, Managing Director, Sales
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 GMI African American Panel
 Size: 143,000 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: 796,000
 GMI Medical Panel
 Size: 1,000,000 Type: Online
 GMI Pre-Natal/New Parent Panel
 Size: 1,101,000 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

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 x 7 x 365 customer service in 37 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 opposite page & p. 55)

goZing

A Greenfield Online Company
 16501 Ventura Blvd., Suite 250
 Encino, CA 91436
 Ph. 818-255-7600
 www.gozing.com
 Panel Titles:
 GoZing Cash Survey
 Type: Online

Grace Market Research, Inc.

3864 Clayton Ave.
 Los Angeles, CA 90027
 Ph. 323-660-2483
 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: 5,400,000 Type: Online
 Greenfield Online Leisure Activities Panel
 Size: 202,000 Type: Online
 Greenfield Online Mom's & 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 managed the Greenfield Online panel, one of the largest, most robust demographically diverse panels in the world. We offer multiple channels of communication to provide our clients survey respondent access. This unsurpassed connection to respondents is coupled with advanced research technologies and survey designs.

(See advertisement on pp. 104-105)

Codes

To search for panels by industry or audience, please use the cross-index section on page 124.

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

**Harris Interactive®**

Corporate Headquarters
 135 Corporate Woods
 Rochester, NY 14623
 Ph. 877-919-4765 or 585-214-7412
 info@harrisinteractive.com
 www.harrisinteractive.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Harris Poll Online
 Type: Online
 Harris Interactive Chronic Illness Panel
 Type: Online
 Harris Interactive Gay, Lesbian & Bisexual
 Type: Online
 Harris Interactive Physician Panel
 Type: Online
 Harris Interactive Technology Decision Makers
 Type: Online
 Harris Interactive Teen Panel
 Type: Online

In an increasingly chaotic and competitive world, Harris Interactive can provide clarity and confidence. We leverage innovative market research solutions to help our clients to understand the drivers of decision making and to strengthen their enterprise equity. By focusing on the dynamics involved in making choices - especially why those are made - we can help our clients make better choices too. Specifically, we advise why people make the decisions they do and how our clients can best influence those decisions. Harris Interactive is proud to have been recognized for the value of its work on seven David Ogilvy Award-winning campaigns.
 (See advertisements on p. 7)

Hotspex Inc.

2345 Yonge St., Suite 800
 Toronto, ON M4P 2E5
 Canada
 Ph. 416-487-5439
 sales@hotspex.com
 www.hotspex.biz
 Panel Titles:
 Hotspex Global Panel
 Size: 4,000,000+ Type: Online

**[i.think inc.]**

i.think inc.
 2811 McKinney Ave., Suite 350
 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. 59)

Illuminas

10th Floor, Chinachem Hollywood Ctr.
 1 Hollywood Rd.
 Central Hong Kong
 Hong Kong
 Ph. 852-2533-4608
 jensen.wong@illuminas-global.com
 www.illuminas-global.com

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
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Informa Rsch. Svcs. Mystery Shopper Panel
 Size: 80,000 Type: Mail, Telephone, Online

Insight Counts

1718 Lake Grasslands West
 Gallatin, TN 37066
 Ph. 615-822-5860
 darlahall@insightcounts.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
 Consumer Link Focus Groups
 Size: 10,000
 Consumer Link Home Use Tests
 Size: 10,000 Type: Telephone, Online
 Consumer Link Product Testing Research
 Type: Telephone, Online

InsightExpress, LLC

1351 Washington Blvd.
 Stamford, CT 06902
 Ph. 877-329-1552 or 203-359-4174
 sales@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 Online Panel
 Type: 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

JRA: Global Healthcare Research Services

J. Reckner Associates, Inc.
 587 Bethlehem Pike, Suite 800
 Montgomeryville, PA 18936-9742
 Ph. 215-822-6220
 GHR03@reckner.com
 www.reckner.com
 Susan Phillippe
 Panel Titles:
 JRA Healthcare Professionals Panel
 Size: 200,000+ Type: Telephone, Online
 JRA Physicians Panel
 Size: 315,000 Type: Telephone, Online

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: 15,000 Type: Online

AN ANSWER TO THOSE WHO WORRY ABOUT THE ACCURACY OF ONLINE RESEARCH

KNOWLEDGEPANELSM

As marketers and policy makers turn increasingly to online research to support crucial decisions, evidence is emerging that demonstrates weaknesses in the "opt-in" method used by nearly every consumer Internet panel. Data presented at a recent conference showed the same opt-in online panel fielding the same questionnaire during two different weeks produced vastly different findings.

KnowledgePanelSM from Knowledge Networks is different. No other consumer Internet panel can say that

- it is truly representative of the offline population—roughly 1/3 of all the people in the U.S.
- its results can be projected with statistical validity to broader population groups
- it prevents "professional respondents" from joining
- it mitigates the biased results of volunteers who are especially interested in a particular topic

The care we take in recruiting and managing KnowledgePanelSM accounts for its remarkable consistency; when one of our clients fielded the

same concept test on KnowledgePanelSM twice—with two weeks in between—the results were statistically identical (see table).

This makes KnowledgePanelSM the most reliable online resource for such crucial marketing tasks as estimating true incidence levels, sizing markets and opportunities, and obtaining publishable findings for peer-reviewed journals.

For more information about KnowledgePanelSM, or to request our *Decision Maker's Guide to Online Research*SM, contact Patricia Graham at (312) 416-3660 or pgraham@knowledgenetworks.com.

KNOWLEDGE NETWORKS.
THE CONSUMER INFORMATION
COMPANY FOR THE 21ST CENTURY.



www.knowledgenetworks.com

know@knowledgenetworks.com

New York | San Francisco | Chicago | Cincinnati | Boston | New Jersey

COMPARISON OF WAVE 1 AND WAVE 2 LEVELS FOR IDENTICAL CONCEPT TEST SURVEYS ON KNOWLEDGEPANEL (JUNE 2006)

	AVERAGE		CONCEPT 1		CONCEPT 2		CONCEPT 3		CONCEPT 4	
	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2
"Top two box"	45.8	46.2	49.8	50.5	47.5	49.6	43.5	44.8	36.4	35.0

Codes

To search for panels by industry or audience, please use the cross-index section on page 124.

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

**Knowledge Networks**

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

Knowledge Networks delivers quality you can use - superior methodologies, design, and analysis that give 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 p. 109)

Knowledge Networks, Inc./Statistical Rsch.

Ashley Business Park, Bldg. G
 570 South Ave. E.
 Cranford, NJ 07016
 Ph. 908-497-8000
 info@knowledgegenetworks.com
 www.sri.knowledgegenetworks.com
 Panel Titles:
 KnowledgePanelSM
 Size: 40,000 Type: Online
 (See advertisement on p. 109)

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

Lightspeed Research

180 Mt. Airy Rd., Suite 100
 Basking Ridge, NJ 07920
 Ph. 908-630-0542
 us@lightspeedresearch.com
 www.lightspeedresearch.com
 Lynnette McCarthy, Mktg. Mgr., N. America
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Lightspeed Mobile/Telecommunications
 Type: Online
 Lightspeed Consumer Panel
 Size: 1,000,000+ Type: Online
 Lightspeed Family/Kids
 Type: Online
 Lightspeed Financial Panel
 Type: Online
 Lightspeed Health Care
 Type: Online
 Lightspeed Hispanic Panel



Luth Research
 1365 Fourth Ave.
 San Diego, CA 92101
 Ph. 619-234-5884
 jepstein@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 opposite page)

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 InsightsTM
 Size: 160,000 Type: Mail, Telephone,
 Online

Market Reader ProTM

5741 Memorial Rd.
 Germansville, PA 18053
 Ph. 610-760-2697
 mooneagle@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
 Lynn C. Kelly, President
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Coporate Employee Benefits Forum
 Size: 300+ Type: Online

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.**

150 Spear St., Suite 600
 San Francisco, CA 94105
 Ph. 415-957-2200 or 888-396-6014
 sales@markettools.com
 www.markettools.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 ZoomPanel
 Size: 2,500,000+ Type: Mail, Online

MarketTools is the defining provider of on-demand market research and the leading innovator of online market research. MarketTools combines the premier technology platform for data collection, reporting and analysis, industry-leading research expertise, and a best-in-class panel of over 2.5 million individuals worldwide to deliver deeper market understanding and interactive insight. The company provides a full spectrum of high-quality, highly accessible market research capabilities to leading businesses and organizations worldwide. Through ZoomerangTM, the company offers the leading self-service platform for online research. (See advertisement on p. 9)

MarketVision Research[®]

10300 Alliance Rd.
 Cincinnati, OH 45242
 Ph. 513-791-3100
 tmcullen@mv-research.com
 www.mv-research.com
 Jon Pinnell, President
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Viewpoint Forum
 Size: 125,000 Type: Online

Mars Research

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

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INVOLVED COMMUNITY.

***Because when you value
time, response rates go up.***



It's simple: reward people for their time and effort, and they'll reward you with loyalty and involvement. That's why SurveySavvy pays respondents cash incentives for every survey they complete. And it's why we pay members for the involvement of people they introduce to us through our patented referral system, too. This unique, proprietary approach has helped us build a diverse online community of loyal, active members with consistently high response rates. See how SurveySavvy's rewards can work for you. Call 800-465-5884.

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luthresearch.com • (800)465-5884

Codes

To search for panels by industry or audience, please use the cross-index section on page 124.

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

MediaTransfer AG Netresearch & Consulting

Beim Strohhaus 31
 20097 Hamburg
 Germany
 Ph. 49-40-6696-250
 info@mediatransfer.de
 www.b2b.mediatransfer.com
 Dr. Thomas Rodenhäusen, Board Member/Spokesman
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 IDOP (Interactive Dynamic Online Panel)
 Size: 250,000 Type: Online

Medimix International

Medimix-Fieldaccess
 35 N.E. 40th St., Suite 200
 Miami, FL 33137
 Ph. 305-573-5220 or 888-MEDIMIX
 bizdev@medimix.net
 www.medimix.net
 Panel Titles:
 Healthcare Professionals Worldwide
 Size: 700,000 Type: Online

MI3 Market Intelligence

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

Millward Brown, Inc.

535 E. Diehl Rd.
 Naperville, IL 60563-7723
 Ph. 630-505-0066
 info@us.millwardbrown.com
 www.millwardbrown.com

**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 & Entertainment Panel
 Type: Online
 Mindfield General Consumer Panel
 Type: Online
 Mindfield Health Ailment & Condition
 Type: Online
 Mindfield Health/Beauty Aides Brand Panel
 Type: Online
 Mindfield Homeowner and Lawncare Panel
 Type: Online
 Mindfield Mothers - Children and Teen Panel
 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

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 (See advertisement on opposite page & p. 21)

The Minter Group

Suite 26/12-14 Waratah Street
 Mona Vale
 Mona Vale, NSW 2103
 Australia
 Ph. 61-2-9979-5277
 gminter@minter.com.au
 www.minter.com.au

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

A MarketVision Research Co.
 25109 Detroit Rd., Suite 330
 Cleveland, OH 44145
 Ph. 440-892-8555
 nmmwest@nmminc.com
 www.nmminc.com
 Panel Titles:
 Online eVAL
 Type: Online

Nextplora S.p.a.

Viala Gian Galeazzo, 3
 20136 Milan
 Italy
 Ph. 39-02-831-1131
 come@nextplora.com
 www.nextplora.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Nextplora Business Panel
 Type: Online
 Nextplora Consumer Panel
 Size: 22,000 Type: Online

NJW Research

42 Catharine 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

Nooro Online Research

1 Yonge Street, Suite 1801
 Toronto, ON M5E 1W7
 Canada
 Ph. 866-657-8753
 shane@nooro.com
 www.nooro.com
 Shane McChesney, President
 Proprietary Panel Mgmt.: Yes

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Codes

To search for panels by industry or audience, please use the cross-index section on page 124.

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

NovaTest

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



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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

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 janet.savoie@onlinesurveysolutions.com
 www.onlinesurveysolution.com



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OpenVenue e-Research Solutions

3080 Yonge St., Suite 3035
 Toronto, ON M4N 3N1
 Canada
 Ph. 800-599-7938 ext. 228
 cireland@openvenue.com
 www.openvenue.com
 Cathy Ireland
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Canadian B2B Panel
 Size: 100,000+ Type: Online
 Canadian Consumer Panel
 Size: 400,000+ Type: Online

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Codes

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

Opinion Search

21800 Melrose, Suite 12
 Southfield, MI 48075
 Ph. 248-358-9922 or 800-358-9919
 info@opinionsearchusa.com
 www.opinionsearchusa.com
 Joanne Levin



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Opinion Search Inc.

160 Elgin Street, Suite 1800
 Ottawa, ON K2P 2P7
 Canada
 Ph. 800-363-4229 or 613-230-9109
 jniwa@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 cross-tabulation. Our Consumer Panel has over 80,000 profiled par-

ticipants 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, 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

The People Panel

(A Div. of Marketing Evaluations, The Q Scores Company)
 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

Persuadable Research Corporation

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

Polimetrix

364 University Ave.
 Palo Alto, CA 94301-1715
 Ph. 800-988-6076 or 650-462-8000
 sales@polimetrix.com
 www.polimetrix.com
 Panel Titles:
 PollingPoint
 Type: Online

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 info@pulse-group.com
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Australia Netherlands Malaysia

Precision Research Inc.

5681 W. Beverly Lane
Glendale, AZ 85306-1879
Ph. 602-997-9711
jmuller@precisionresearchinc.com
John L. Muller, President/CEO
Proprietary Panel Mgmt.: Yes
Panel Titles:
Custom Panels
Type: Mail, Telephone, Online

Profile Marketing Research, Inc.

4020 S. 57th Ave., Suite 101
Lake Worth, FL 33463
Ph. 561-965-8300
profile@profile-mktg-res.com
www.profile-mktg-res.com



Pulse Group

Canna Block, Suite A, Cyberview Lodge Resort
Persiaran Multimedia
Cyberjaya 63000
Malaysia
Ph. 603-8318-3573
kym.wong@pulse-group.com
www.planet-pulse.com
Kym Wong, Chief Marketing Officer
Proprietary Panel Mgmt.: Yes
Panel Titles:
www.planet-pulse.com
Size: 2,000,000 Type: Telephone, Online

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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

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Type: How members are surveyed (mail, telephone, online)

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 New York, NY 10018
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quote@researchnow-usa.com

www.researchnow-usa.com

Proprietary Panel Mgmt.: Yes
 Panel Titles:

Australian Online Panel

Size: 100,000 Type: Online

Austrian Online Panel

Size: 5,000 Type: Online

Belgium Online Panel

Size: 3,000 Type: Online

Czech Online Panel

Size: 5,000 Type: Online

Danish Online Panel

Size: 20,000 Type: Online

Dutch Online Panel

Size: 15,000

English Online Panel

Size: 300,000 Type: Online

Finnish Online Panel

Size: 10,000 Type: Online

French Online Panel

Size: 110,000 Type: Online

German Online Panel

Size: 110,000 Type: Online

Greek Online Panel

Size: 5,000 Type: Online

Hungarian Online Panel

Type: Online

Irish Online Panel

Size: 30,000 Type: Online

Italian Online Panel

Size: 80,000 Type: Online

Mums Online Panel

Size: 20,000 Type: Online

Norwegian Online Panel

Size: 5,000 Type: Online

Polish Online Panel

Size: 25,000 Type: Online

Portuguese Online Panel

Size: 10,000 Type: Online

Russian Online Panel

Size: 35,000 Type: Online

Spanish Online Panel

Size: 110,000 Type: Online

Swedish Online Panel

Size: 20,000 Type: Online

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Research Solutions Ltd.

P.O. Box 82081

Highland Park

Auckland

New Zealand

Ph. 64-9-538-0500

jon@resolutions.co.nz

www.researchsolutions.co.nz

Panel Titles:

Healthtracker

Size: 500

ResearchByNet

1220 Sheppard Ave. E., #100

Toronto, ON M2K 2S5

Canada

Ph. 800-461-3924 or 416-493-6111

info@researchbynet.com

www.researchbynet.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

Resolution Research & Marketing, Inc.®

625 E. 16th Ave., Suite 202

Denver, CO 80203

Ph. 800-800-0905

mary@re-search.com

www.ResolutionResearch.com

Panel Titles:

Resolution Research College & Consumer

Type: Telephone, Online

Resolution Research IT/B2B

Type: Telephone, Online

Resolution Research Medical

Type: Telephone, Online

Resolution Research Mothers

Type: Telephone, Online

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: 8,500 Type: Online

Momconnection.com

Size: 8,000 Type: Online

Surveycafe.com

Size: 100,000 Type: Online

RestaurantInsights.com

111 Stonemark Lane, Suite 109

Columbia, SC 29210

Ph. 803-798-6373

fred@restaurantinsights.com

www.restaurantinsights.com

Fred Efrid

Panel Titles:

RestaurantInsights.com Consumer Panel

Size: 3,000,000

P. Robert and Partners S.A.

International Marketing Research

Avenue de Lonay 19

CH-1110 Morges

Switzerland

Ph. 41-21-802-84-84

pmohn@probert.com

www.probert.com

Rockhopper Research

428 Humboldt St.

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www.rockhopperresearch.com

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United Kingdom

Ph. 44-20-7903-7000

andrew.nelson@ronin.com

www.roninfocus.com

Anron Richter, Bus. Dev. Manager

Proprietary Panel Mgmt.: Yes

Panel Titles:

RONIN Healthcare International Panel

Size: 150,000 Type: Telephone, Online

RONIN IT International Panel

Size: 250,000 Type: Telephone, Online

Sample Czar, Inc.

940 N. Orange Dr., Suite 120

Hollywood, CA 90038

Ph. 323-325-9465

dlowell@sampleczar.com

www.sampleczar.com

Douglas Lowell, President

Panel Titles:

Sample Czar Business

Type: Online

Sample Czar Consumer

Type: Online

Sample Czar Hispanic

Type: Online

Sample Czar Kids/Teens

Type: Online

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 Zanolopoulo, President

Proprietary Panel Mgmt.: Yes

Panel Titles:

Readers Panels - Publication Specific-

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Type: How members are surveyed (mail, telephone, online)

Specpan

6640 Intech Blvd., Suite 100
Indianapolis, IN 46278
Ph. 866-SPEC PAN
sales@specpan.com
www.specpan.com
Panel Titles:
Building & Construction Industry
Professionals
Size: 13,000 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.

66 E. Ninth St., Suite 1407
St. Paul, MN 55101
Ph. 651-228-7250
cmorgan@strategicdirectionsgroup.com
www.strategicdirectionsgroup.com
Panel Titles:
Boomer & Their Elders
Size: 25,000 Type: Mail



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One Post Rd.
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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)
www.Mielipidemaailma.com (Finland)
Type: Online
www.Mondodiopnionie.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

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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

Synovate

222 South Riverside Plaza
Chicago, IL 60606
Ph. 312-526-4000
us@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
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 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
Type: Online

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@techtarg.com
www.techtarg.com
Toby Cogan, Market Research Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
TechTarget IT Research Panel
Size: 500,000 Type: Online

The Gallup Panel

901 F Street N.W.
Washington, DC 20004
Ph. 877-242-5587
sarah_van_allen@gallup.com
www.galluppanel.com
Sarah Van Allen
Proprietary Panel Mgmt.: Yes
Panel Titles:
The Gallup Panel
Size: 50,000 Type: Mail, Telephone, Online

**Think Virtual Fieldwork**

205 Worth Ave., Suite 201
Palm Beach, FL 33480
Ph. 203-354-4544
ray@thinkvirtualfieldwork.com
www.thinkvirtualfieldwork.com
Proprietary Panel Mgmt.: Yes

At Think Virtual Fieldwork we are dedicated to providing high-quality, online data collection services, including sample management, hosting and programming, online data delivery and superior customer service to marketing researchers. Our goal is to make online data collection simple and easy for you. (See advertisement on Inside Back Cover)

TNS

100 Park Ave., 4th Floor
New York, NY 10017
Ph. 212-991-6000
rob.wengel@tns-global.com
www.tns-global.com
Rob Wengel
Panel Titles:
TNS NFO Baby Panel
Size: 200,000 Type: Mail, Telephone, Online
TNS NFO Chronic Ailment Panel
Size: 1,000,000 Type: Mail, Telephone, Online
TNS NFO Hispanic Panel
Size: 65,000 Type: Mail, Telephone, Online
TNS NFO Investor Panel
Size: 400,000 Type: Mail, Telephone, Online
TNS NFO Occupation & Industry Panel
Size: 400,000 Type: Mail, Telephone, Online
TNS NFO Panel
Size: 1,500,000 Type: Mail, Telephone

TNS Hong Kong

12A/F Sun Hung Kai Centre
30 Harbour Rd.
Wanchai
Hong Kong
Ph. 852-2116-8888
office.hk@tns-global.com
www.tns-global.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
6th dimension™ Access Panels
Size: 347,000 Type: Online
6th dimension™ Access Panels China
Size: 60,000 Type: Online
6th dimension™ Access Panels Hong Kong
Size: 25,000 Type: Online
6th dimension™ Access Panels Japan
Size: 30,000 Type: Online
6th dimension™ Access Panels Korea
Size: 60,000 Type: Online
6th dimension™ Access Panels Malaysia
Size: 10,000
6th dimension™ Access Panels New Zealand
Size: 121,000 Type: Online
6th dimension™ Access Panels Taiwan
Size: 188,000 Type: Online
6th dimension™ Access Panels Thailand
Size: 10,000 Type: Online

ToLuna USA, Inc.

419 Lafayette, 2nd floor
New York, NY 10003
Ph. 646-723-4595
holly.williams@toluna.com
www.toluna.com
Holly Williams, Vice President
Panel Titles:
ToLuna Panel
Size: 1,100,000+ Type: Online

Tragon

365 Convention Way
Redwood City, CA 94063-1402
Ph. 800-841-1177 or 650-365-1833
info@tragon.com
www.tragon.com
Rabia Bhimla

Untiedt Research GmbH

Denkmalstrabe 2
45529 Hattigen
Germany
Ph. 02324-98-33-91
info@untiedt.de
www.untiedt.de
Panel Titles:
ArchitektenTrend: 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:
Virtual Surveys
Size: 50,000 Type: Online

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Codes

To search for panels by industry or audience, please use the cross-index section on page 124.

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

VISIONCRITICAL™

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858 Beatty St., 7th floor
 Vancouver, BC V6B 1C1
 Canada
 Ph. 604-647-1980
 vancouver@visioncritical.com
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 Jason Smith, Sr. V.P. Sales & Marketing
 Proprietary Panel Mgmt.: Yes

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 (See advertisement on pp. 51, 53)



Western Wats - Headquarters

701 East Timpangogog Pkwy., Bldg. M
 Orem, UT 84097
 Ph. 801-373-7735
 contact@westernwats.com
 www.westernwats.com
 Panel Titles:
 Opinion Outpost ePanel
 Type: Online

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 (See advertisement on p. 65)

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 London SE1 2BH
 United Kingdom
 Ph. 44-20-7252-1118
 info@w1-research.com
 www.w1-research.com
 Panel Titles:
 WorldOne's European IT Panel
 Size: 25,000
 WorldOne's Global Pharmacists Panel
 Size: 9,500 Type: Online
 WorldOne's Global Physician Panel
 Size: 85,000 Type: Online
 WorldOne's Global Veterinarian Panel
 Size: 5,000 Type: Online



online opinion panel

Your2Cents Online Opinion Panel

(Common Knowledge Research Services)
 16200 Dallas Pkwy., Suite 140
 Dallas, TX 75248-6897
 Ph. 800-710-9147
 getinfo@commonknowledge.com
 www.commonknowledge.com
 Steven R. 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+ Type: Online
 Your2Cents IT Prof./Tech. Users/Dec. Makers
 Size: 25,000+ Type: Online
 Your2Cents Online Opinion Panel
 Size: 3,750,000 Type: Online
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 Your2Cents Small Business Owners
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 (See advertisement on opposite page & Insert)

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 Sweden
 Ph. 45-70-27-22-24
 info@zapera.com
 www.zapera.com
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 AEldresagen (DaneAge Association)
 Type: Online
 Danmarks Radio (Broadcasting Union)
 Type: Online
 Dansk Metal (Metal Workers' Union)
 Type: Online
 Mandag Morgen (Mondag Morning Weekly)
 Type: Online
 Zapera.com Denmark Panel
 Size: 41,000 Type: Online
 Zapera.com Estonia Panel
 Size: 4,000
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 Zapera.com Medical Panel Denmark/Sweden
 Size: 251 Type: Online
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 Size: 40,000 Type: Online



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150 Spear St., Suite 600
 San Francisco, CA 94105
 Ph. 800-316-0662 or 415-957-2000
 sales@zoomerang.com
 http://info.zoomerang.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 ZoomPanel
 Size: 2,500,000+ Type: Mail, Online

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 (See advertisement on p. 9)



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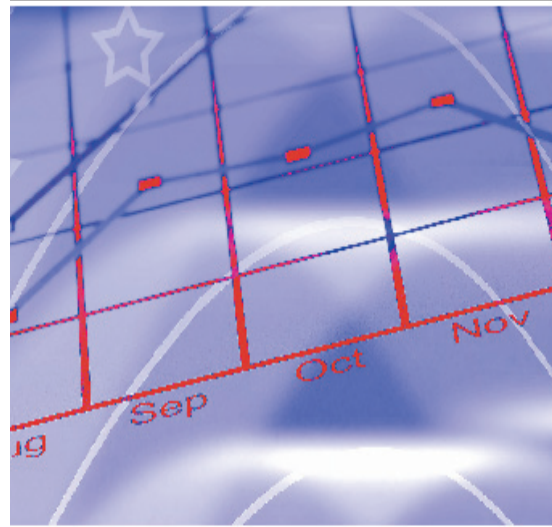
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Trade Talk

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global consumer and market knowledge at Procter & Gamble, said she knows that client-side companies put pressure on research suppliers to lower cost and increase speed but she never thought that those aims would come at the expense of data quality.

Image problem

One discussion thread focused on the industry's image - or lack thereof - positing that cooperation rates might improve if the public knew more about what marketing research is, how it functions as a way for consumers to make their needs and preferences heard by business, and how, though it may have the word marketing in it, it is not the same as telemarketing.

To that end, there was talk of a wide-ranging ad campaign - a la the "Got milk?" ads - to help brand marketing research and make the public aware of its value and their role in the process. But such a program would take money, lots of money, and conference panelists who have served on industry organizations recalled in detail the extreme difficulty of raising even nominal sums to fund past industry efforts such as the Your Opinion Counts campaign.

In other random observations:

- Bob Groves, director of the center for survey research at the University of Michigan, said response rates are poor indicators of data quality. The industry should really focus on the mechanisms that secure cooperation, he argued.

- John Zogby, president/CEO of Zogby International, said the industry has spent too much time fighting those who are trying to find new ways to reach people.

- Simon Chadwick, a partner in research firm Cambiar, bemoaned the state of survey quality, calling it "dire" and citing the value of efforts such as the EXPLOR awards, which are often given to companies that have tried to make research more engaging.

- Larry Mock, formerly with P&G and now president, strategic development and go-to-market at StrataMark Dynamic Solutions, said that client-side companies have an opportunity to use the attention they pay to listening to consumers as a marketing/branding opportunity. He also said that everyone in the industry, whether vendor or client, needs to sit in the respondent's seat to experience the research process from their perspective.

- Tracy Hampton, senior vice president research services at Visa, said it's critical for the industry to consider how respondents want to be contacted and take that into consideration. But that raises the question of how to marry different methods and still get comparable data. Indeed, as Michelle Salazar, vice president, global brand and business research at McDonald's, said, new methods/technologies may be helpful in engaging consumers but they pose a problem for companies that have longstanding tracking studies. A switch to a new approach not only takes time but also may make years of historical data less valuable once continuity is lost.

Group effort

All involved - the organizers, the speakers and the attendees who fired pointed questions at those on the dais - deserve thanks for bringing the conversation out into the open. It's good that every industry faction was represented because it will take a group effort to find solutions to cooperation-related problems.

While some of the factors affecting response rates are out of the industry's control, not all of them are, and I think the industry should certainly take charge in the areas that it does control, namely by rigorously imposing limits on survey length (and being honest with consumers about completion times - don't tell them a survey should take them 15 minutes when you know it's likely double that), working hard to make participating in research as fun and interesting as possible,

repeatedly thanking respondents for their time, and seizing every opportunity to communicate research's valuable role in giving consumers a direct influence on the products and services they use.

Take ownership

In the past, the task of handling these types of thorny issues understandably fell squarely on the shoulders of the industry associations. But one of the main takeaways of the Chicago conference was a wide agreement that the process of dealing with the problem must be a joint effort of client-side researchers and research vendors - a gratifying outcome. I was happy to see the client and vendor camps take ownership, as I think the associations are sometimes leaned upon too heavily when it comes to solving the industry's woes.

I realize the association ranks are made up of those very same research clients and vendors but my hunch is that a client/vendor-led effort might have more impact or capture more awareness than one that's solely association-driven. I think there is a sizable portion of the research-using marketing community who feel that associations only deal with arcane topics and therefore may tune out what the industry bodies have to say. But if, for example, a marketing or consumer insights exec from Well-Respected Large Company X started talking about respondent cooperation in a public forum, those people might be more inclined to listen.

Further, it only makes sense for the practitioners to take the lead. For they are the ones hiring the vendors and writing and commissioning the surveys that respondents choose to complete or not complete. They need to be aware of (and be made aware of) the issues surrounding respondent cooperation and work with their vendors and their peers (and their industry's associations) to find solutions to cooperation-related problems before it's too late. | Q



A cooperative effort on cooperation

If the first step toward solving a problem truly is admitting there is a problem then the research industry took a giant leap a few months ago.

At a conference on the topic of declining respondent cooperation at Chicago's venerable Drake Hotel in late September, researchers from client companies, vendor firms and industry organizations gathered to exchange viewpoints on the problem and determine how to fight its effects.

Bob Lederer, founder and president of RFL Communications Inc. – publisher of the *Research Business Report* and its associated newsletters – and his staff organized the two-day event along with the Council for Marketing and Opinion Research (CMOR) and conference coordinator IIR.

The highlight was a morning-long panel discussion, moderated by Lederer, among over 30 industry representatives, including client-side, providers and research association heads. Some of the companies/organizations represented included McDonald's, Procter & Gamble, CBS, Visa, IBM and General Motors; ACNielsen, Arbitron, NPD

Group, IRI and GfK; the Council of American Survey Research Organizations, the Marketing Research Association, CMOR and the Advertising Research Foundation.

While there were differing assessments from the panelists on the scope of the problem, all were in agreement about its causes: Caller ID and other call-screening technology; the increase in cell phone-only households; lengthy, boring surveys; harried consumers tired of being bombarded by media 24/7, etc.

Some on the client side, especially those using a lot of online research or those who conduct highly focused research in specialized markets, said they really weren't too concerned about response rates. Others said they used a mix of methods to get to the right respondents, so they weren't that concerned about respondent cooperation overall.

Many panelists spoke of a kind of don't ask/don't tell situation, in which they suspected clients were too busy to think about the effects of declining cooperation and vendors were too afraid to broach the topic for fear of raising data quality

issues and possibly losing business as a result. Arbitron's Owen Charlebois called on vendors to simply be professional, likening the research firms to doctors, who are duty-bound to do the best job for their patients. If there are data quality issues related to cooperation rates, vendors shouldn't wait for the clients to discover problems before dealing with them.

None of the above

In an era of declining response rates, vendors commented on the increasing difficulty of meeting clients' calls for "better, faster, cheaper" research when those demands may result in research that meets none of the above criteria. Declining cooperation rates can compromise data quality and necessitate leaving studies in the field longer due to the difficulty in completing interviews, which brings associated cost increases. Research firms are somewhat insulated on the last point, as they can simply pass costs related to declining cooperation on to clients. But that can only go so far, and if data quality suffers, then the issue becomes much more serious. Kim Dedeker, vice president,

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