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NOVEMBER 2008

Marketing Research Review

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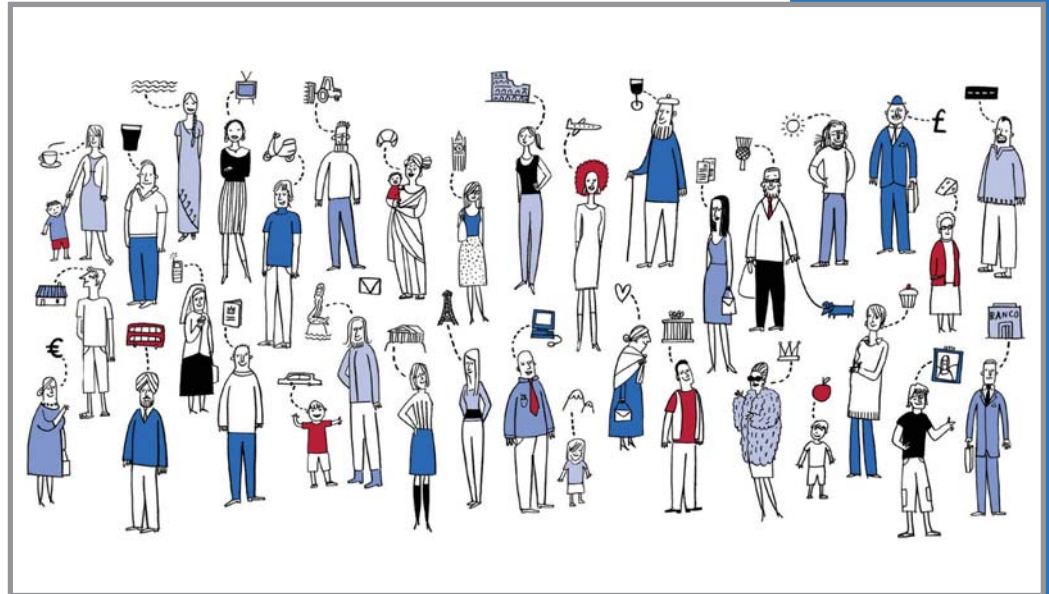
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contents

techniques

- 30 Meeting Western needs in an Eastern setting**
An overview of business-to-business research in China
By Matthew Harrison and Alaric Fairbanks
- 36 Here, brand obits may not work so well**
Effective qualitative research in China requires understanding of customs, cultures and techniques
By Steve Richardson
- 42 From an old order, a new frontier**
Tips on conducting online research in Russia
By Misha Neverov and Robert Schieffer
- 46 A phased approach**
Maintaining qualitative research standardization in spite of cultural differences
By Theresa Schreiber and Daryl Gilbert
- 50 Multiple zones, one approach**
Managing the impact of personnel on international research projects
By Owen Jenkins

- 54 The survey killer**
A look at the impact of boredom on the respondent experience
By Deborah Sleep and Jon Puleston
- 62 Aiming for the best response possible**
A look at four important methodological questions for online research
By Susan Frede
- 68 Let's meet the respondents more than halfway**
Creating the conditions for data quality
By Laura Davies
- 76 Why do they do it?**
Research panels from the panelists' perspective
By Janet Westergaard

columns

- 20 By the Numbers**
How to avoid language problems in international IT research
By Julia Lin
- 24 Data Use**
Measuring and maximizing the ROI of a loyalty program
By Michael D. Lieberman
- 130 Trade Talk**
A global economy, for good or ill
By Joseph Rydholm

departments

- 8 In Case You Missed It...**
- 10 War Stories**
- 12 Survey Monitor**
- 14 Names of Note**
- 16 Product and Service Update**
- 18 Research Industry News**
- 18 Calendar of Events**
- 87 2008 Research Panels Directory**
- 128 Index of Advertisers**
- 129 Classified Ads**

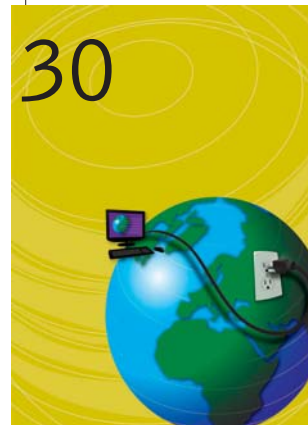


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in case you missed it...

news and notes on marketing and research



Can your DVR improve your marriage?

DVR (digital video recorder) owners have ranked the DVR as the second-most essential household technology item, and more than 70 percent report that they cannot live without it, according to a recent study conducted by London research company Consumer Analysis Group on behalf of The NDS group, a Middlesex, U.K., digital technology company. The survey has revealed DVRs as the second-most indispensable item available today, the first being mobile phones. The survey involved 1,012 people from the U.K., U.S., Italy and Australia, age 18-70, who have a DVR at home.

DVR owners watch on average slightly more than four hours of recorded and live television a day, and nearly 61 percent of consumers think that a DVR is much easier to operate than a VCR. Almost 58 percent of DVR owners find they are watching more interesting TV programs, and many respondents with only one DVR are likely to purchase a second one. Eighty-nine percent of Americans, 81 percent of British, 80 percent of Australians and 78 percent of Italians reported that the DVR has improved how much they enjoy watching television.



When asked to rank relative importance of a list of household appliances, apart from the washing machine and the microwave oven, no other household item was deemed more essential than the DVR in today's homes.

Intriguingly, the vast majority of respondents would rather give up their landline phone, dishwasher, radio and MP3 player than their DVR.

The survey also reveals that over 60 percent of DVR owners with a partner felt that having a DVR had improved their relationship. In the U.S., U.K. and Australia, respondents attributed this improvement to having the ability to watch their own programs while sharing their favorites with each other. Surveyed Italians feel that their improved relationship happiness is due to the DVR allowing them to plan their viewing better. More than three-quarters of DVR owners in the U.S., Italy and Australia with families also feel that having a DVR has improved their family relationships, eliminating arguments over TV and allowing for the whole family to join the dinner table. In Britain, around two-thirds of DVR owners felt this way.

Grocery stores evolve via high-tech makeovers

As shoppers across the U.S. scramble to save money, grocery store chains are losing market share to supercenters and warehouse clubs. But Stop & Shop, a Quincy, Mass., grocery store, and Maryland-based grocery chain Giant are fighting back by introducing a new logo, additional products, updated store décor and a handful of high-tech innovations designed to help shoppers feel they're managing their grocery budgets better.

Consumers got their first look at the changes at the Giant store in Bethesda, Md., in August 2008, but the changes will roll out fully at both chains, owned by Dutch retailer Ahold, over the next year. Among the new introductions are expanded private-label offerings, an increased number of fresh prepared foods, including soups, new fresh-flavored rotisserie chickens and more hot and cold side dishes. The store will also offer shoppers a handheld scanner device they can use throughout the store that checks prices, keeps a running total and generates brand-related coupons for products as they shop. The company is also making a bigger investment in convenience: a Delivision kiosk allows shoppers to place deli orders when they enter the store, so they don't have to wait as long in line.

As part of the updates, the company is also testing a family-friendly lane. In many stores, that simply means that the checkout lane is tabloid- and candy-free and offers healthy snacks such as yogurt, animal crackers and bottled water. The company describes the changes as "a further step in Ahold's global strategy to create powerful local consumer brands," adding that it shows the company is "committed to providing great food and meal solutions at low prices every day."

Belly up to the bar TV

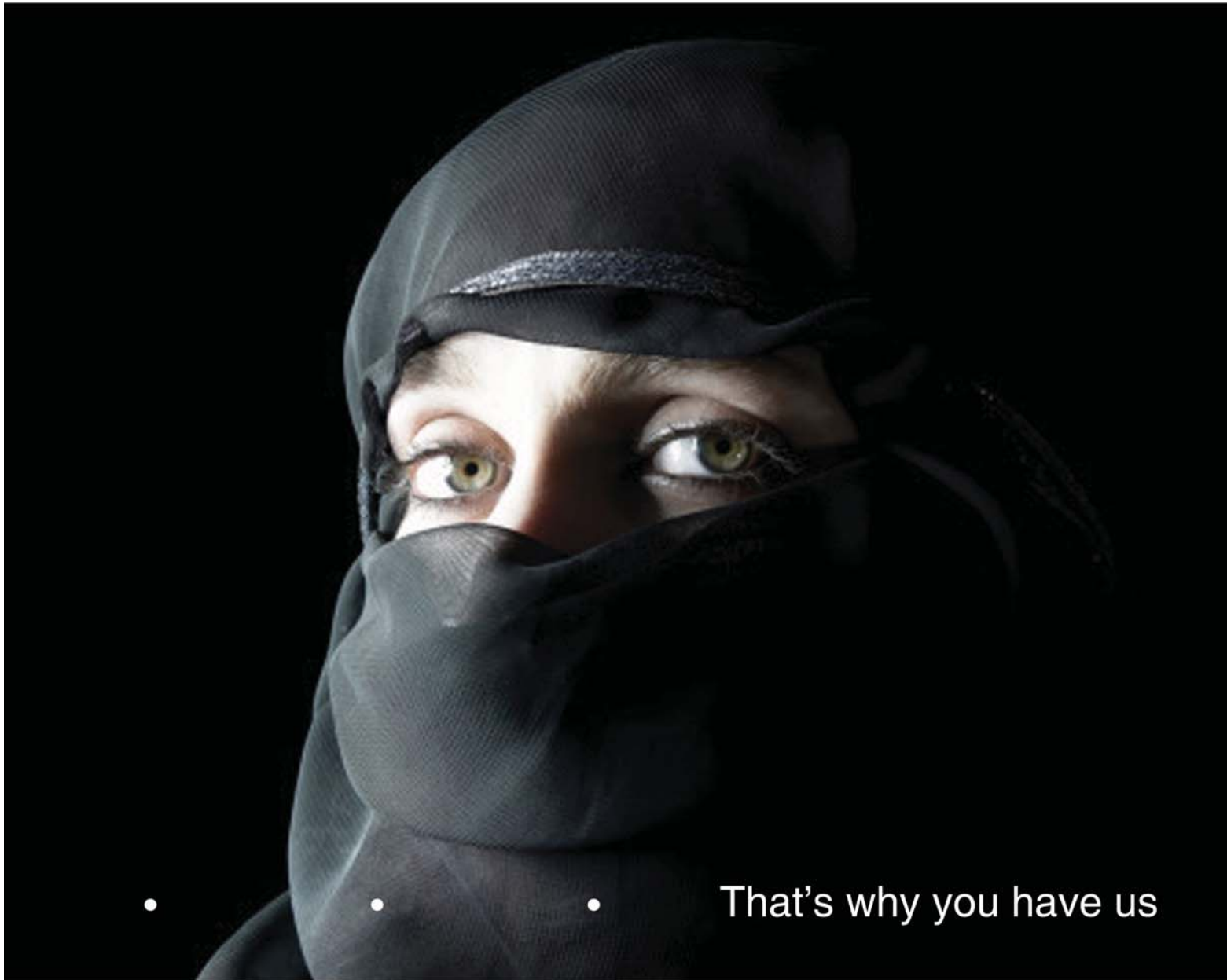
In-bar advertising has traditionally conjured up images of neon-lit signs promoting beverages for sale. The new bar landscape features a wide range of non-endemic brand messages designed to take advantage of the young, upwardly-mobile crowds these establishments attract.

A significant number of American consumers are exposed to bar-based media on a regular basis. More than one-half of U.S. residents age 21+ have been to a bar or lounge in the past month, and 32 percent of adults have been to a bar in the past week, according to New York research company Arbitron's Bar Media Report, which was generated in conjunction with Edison Media Research, Somerville, N.J. Nearly two-thirds (62 percent) of young adult men age 21-34 have been to a bar in the past month; 43 percent have been to a bar in the past week.

Bar visitors may be more difficult to reach through traditional TV ad campaigns because they are more likely than the average adult to watch TV shows on alternative platforms including DVD, Internet download, online (streaming) and video-on-demand. Bar visitors are also more likely to use a DVR (digital video recorder) when they do watch programs on their TV at home. A considerable amount of bar visitors also watch TV outside the home - while at the bar. More than 40 percent of weekly bar visitors have watched TV in a bar in the past 30 days. Half of all young adult men age 21-34 have watched television in a bar in the past month.

Those exposed to bar media are more likely to listen regularly to online radio, subscribe to satellite radio and own an iPod or other MP3 player. Subsequently, bar visitors spend more on digital music purchased through online retailers such as iTunes; 19 percent of all adults age 21+ have purchased music for download; and more than one-quarter of weekly bar visitors have purchased songs and albums online.

Some places are hard to reach



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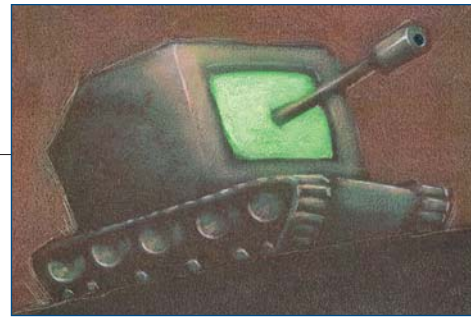
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war stories

true-life tales in marketing research



Editor's note: War Stories is an occasional column in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous anecdotes of life in the research trenches. Send your own (or a colleague's) tales of research-related wackiness to him at artshulman@aol.com. Contributors may remain anonymous.

Diane Trotta of Trotta Associates was planning to conduct a research project in France and sent an e-mail to prospective subcontractors there requesting costs for recruiting female cat owners. The question she received back from one of her contacts was, "Suppose the owner does not know if the cat is a female or male?"

Gary S. Martin of Savitz Research Solutions reports that several years ago he was conducting a focus group on a new wireless security concept in which the discussion touched on everything from burglary to fire detection. At one point, the facility's fire alarm went off. Martin opened the door to see what was going on and smelled smoke. He got all of the clients out of the back room and respondents and clients walked down three flights of stairs to safety. By the time they got outside, multiple fire trucks were there and firemen were racing into the building.

Martin gathered all of the respondents together and the clients stood to the side. The respondents asked if, with all the activity going on around them, they should continue the session

on the front lawn. Martin actually considered it for a second before dismissing the idea.

That's when a member of the client company came over, along with his executive management team, and asked, "What do you normally do in these situations?"

Martin drew a blank but he eventually ended up rescheduling the group. The facility did not charge for the reinvasion of the original respondents and every respondent except one showed up for the makeup session.

Now Martin says he knows what to "normally" do.

Doug Schorr of Schorr Creative Solutions had just wrapped up some insightful focus groups for a fast-food client, clearly talking to the primary demographic for his client: young men ages 18 to 24. The running joke, found among respondents across several markets, was that this particular restaurant was great after a night of partying and smoking (not cigarettes).

As Schorr left the facility and was walking through the parking garage he reached a beat-up old van that seemed to belong in a Cheech and Chong movie. The van's large sliding side door opened and out wafted a cloud of pot smoke, followed by a laughing respondent from one of the recently-ended groups. The fellow more or less tumbled from the vehicle, higher than a kite. He looked at Schorr and said that all of the talk of food and smoking in the focus group created an urge that he just couldn't pass up.

Sometimes clients from other countries are not fully in touch with their business in the United States, as Michael Stanat of SIS International Research learned. His client, a foreign manufacturer of an unusual-looking, unconventional vacuum cleaner, wanted his firm to conduct an observational study in retail outlets to gauge actual purchase behavior.

The first problem was that the product was sold only over the Internet (Stanat's firm finally determined this after trying to locate retail outlets selling the product). The second was that even if the product had been sold at retail outlets, market share was so low that finding someone who was actually shopping for the product would have been very costly.

Once this was explained to the client, the nature of the project was changed. Stanat's firm was assigned the task of observing the actual "normal" use of the product in the homes of consumers who'd purchased the item. The client expected that consumers purchased the vacuum because of its versatility, as was the case in the home country, and he wanted to determine consumers' perceptions of the product's effectiveness in vacuuming sofas as well as floors. The only problem was that once interviewers managed to find buyers who'd let them into their homes, these customers clearly used the product only for vacuuming carpets and floors. Unlike in the home country, no one used it to vacuum sofas. So much for the client's expectations! | Q

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Wireless customers dissatisfied playing the waiting game

Wireless phone customers who call their provider when experiencing a problem are waiting on hold longer than in the past to speak with a service representative, according to the J.D. Power and Associates 2008 Wireless Customer Care Performance Study, Volume 2, conducted by Westlake Village, Calif., research company J.D. Power and Associates. Now in its sixth year, the semi-annual study examines wireless carrier customer care service in three areas: telephone calls with a service representative and/or automated response system; visits to a retail wireless store;



and via the Internet. Within each contact method, processing issues such as problem-resolution efficiency and hold-time duration are also measured.

The study finds that the average amount of time wireless customers spend on hold before speaking with a customer service representative in 2008 is 4.4 minutes, up 34 percent from the average hold time in 2003 (3.3 minutes).

“As customers try new and increasingly complex wireless phone services and products, such as play-

ing MP3 files, capturing still pictures or video or downloading ring tones, they are more likely to call their provider for support,” says Kirk Parsons, senior director of wireless services at J.D. Power and Associates. “Customer care centers and service representatives are under pressure to handle the increase in inquiries, while still trying to understand and resolve the customer’s issue on the initial contact. This can potentially increase the number of transfers and the hold times for customers. With an increase in hold times, providers run the risk of decreasing customer satisfaction and losing customers to other providers, as switching levels are 83 percent higher among customers who are put on hold, compared with those who are not.”

Forty-nine percent of wireless customers have contacted the customer care service center for assistance within the past year, an increase from 47 percent reported six months ago. Additionally, among customers who contacted the service department, 34 percent did so due to service/equipment issues.

Verizon Wireless ranks highest in wireless customer care performance with an index score of 103, followed by Alltel (102), T-Mobile (100) and AT&T (97). Specifically, customers report that Verizon Wireless performs particularly well in resolving problems in one contact.

The study also finds several key wireless customer care patterns: among customers who contact their provider, 75 percent do so by telephone while 24 percent do so by visiting their provider’s retail store. E-mail/Internet interactions account for only 1 percent of customer contacts. The average number of reported phone contacts needed to resolve a customer inquiry is 1.76, down from 1.91 contacts in the last reporting period. Customers who visit the provider’s retail store for service inquiries

report waiting an average of seven minutes before speaking with a representative. For more information visit www.jdpower.com.

Future homebuyers likely to be young and minority

The housing boom of 2004-2005 led to a bust that’s worse than most expected. Home prices are still falling, foreclosures rising and homeownership rates are starting to drop. Still, a study from Chicago research company Mintel projects golden opportunities in this dismal market: young adults and minorities. Mintel’s mortgage report suggests echo Boomers (currently aged 13-30) and Hispanic, Asian and black Americans could be key to the real estate market’s turnaround.

“As home prices fall, we see more first-time buyers stepping up,” says Susan Menke. “Those who couldn’t afford to buy during the housing boom - and now have nothing to sell - are taking advantage of lower prices. Lenders should focus on first-time buyers, especially echo Boomers and minorities, to pump life back into the mortgage market.”

Homeownership rates are rising fastest among young adults and minorities. In 2007, nearly 25 percent of Americans under age 25 owned a home, up substantially from 16 percent in 1990. Likewise, 51 percent of Hispanic, black and Asian-Americans owned homes in 2006, a notable rise from 44 percent in 1995.

The study revealed that more young adults and minorities plan to buy a house in the next five years. Though just 23 percent of the general population plans to buy, 38 percent of adults age 18-24 and 39 percent of those 25-34 say they will. Across age groups, more Asians (42 percent), blacks (37 percent) and Hispanics (30 percent) say they will buy a home in the next five years than whites (20 percent).

continued on p. 80

QUALITY PROJECT MANAGEMENT REQUIRES A QUALITY EDUCATED STAFF

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names of note

Jan Bleyaert has resumed her role as owner and president of *Capture Research* in Boston. Bleyaert was previously employed by *Morpace Inc.*, a Farmington Hills, Mich., research company.

Promodata, an Oakbrook Terrace, Ill., research company, has recognized **Linda McKnight**, vice president of operations and client services, for her 25 years of service to the company.

New York research company *TNS North America* has appointed **David Kieselstein** as CEO.

MarketTools, a San Francisco research company, has named **Scott Arnold** president and CEO. **Amal Johnson** has been elected as the chairman of the board of directors.

Jigsaw Research, London, has hired **Hazel Fletcher** as director and **Danielle Malone** as research director.

Paris-based research company *Ipsos* has hired **Brian Smith** as vice president in its media, content and technology division, based in San Francisco. Additionally, **Giorgio Caporusso** has been named general manager.

G & S Research, Indianapolis, has hired **Erin Horner** as a director of client services.

Swift Research, Wetherby, U.K., has added **Joey Flynn** to its automotive research team.

Annette Landesman has joined *EMI Surveys*, a London research company, as a sales executive.

Experian Consumer Research, New York, has promoted **Mel Mason** to global CIO and appointed **Nico van der Westhuizen**, **Holger Dittombée** and **Martin Rossak** as market heads in its Decision Analytics division of the Nordic and

Baltic region, Germany and Central Europe, respectively.

Scott Hanson has been promoted to vice president at *Decision Analyst Inc.*, an Arlington, Texas, research company.



Hanson

Yorke

McCallum Layton, a Leeds, U.K., research company has hired **Heather Yorke** and **Mark Cutter** as senior research executives and **Greg Hill** as a data processing executive.



Cutter

Hill

Travelx Global Business Payments, a Washington, D.C., payment services provider, has appointed **Debbie Brown** to its global management team as global vice president of marketing.

Donald Stuart has returned to *T3i Group*, a Parsippany, N.J., research consultancy, as a market research specialist based in the firm's Cherry Hill, N.J. office.

MarketCast, a Los Angeles research company, has hired **Henry Piney** as a managing director.

GMI, a Seattle research company, has hired eight new staff members: **Maritza Chott**, manager, revenue accounting; **Tom House**, senior database engineer; **Giuseppe Mancuso**, account manager; **Jack McGuire**, panel manager; **Emilyne van der Beken**, office manager; **Jessie Saal**, account manager; **Jolie Huang**, programmer; and **Bruce Wang**, account executive.

Roger Green and Associates Inc., a New Hope, Pa., research company, has hired **Deni Deasy Boekell** as vice president, client strategist, and **Michael J. Epstein** as associate director, research.



Boekell

Epstein

Chris Goodwin, **Tim Laake** and **Jim Linz** have been named partners at *Directions Research*, Cincinnati.

InsightExpress, a Stamford, Conn., research company, has appointed **Ashley Rusk**, **Stephanie Kung**, **Staci Cohen**, **Sherman Low** and **Jeremy Saz** as project managers on its digital media measurement team.

Steven M. Smith has been hired as executive vice president, survey operations, at New York research company *Arbitron Inc.*

M/A/R/C Research, Irving, Texas, has named **Pam Koenig** account manager and promoted **Ken Keith** to senior manager, online and emerging research technology.

continued on p. 86

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product and service update

New portal to help identify government opportunities

Northern Light, a Cambridge, Mass., research company, has launched a portal designed to help companies identify sales opportunities with federal, state and local governments throughout the United States. The SinglePoint Government Opportunities Edition indexes an array of government buying intention announcements, reports and news stories from research sources specializing in government procurement. Government-specific sources include Centurion Research Solutions, EagleEye, Infobase Publishers and FedBizOps.gov.

Powered by Northern Light's search engine, SinglePoint Government Opportunities Edition provides a search index of targeted government RFIs, RFPs and contract awards. Also included in the search index are 85,000 reports from 20 IT market research firms such as Datamonitor, Forrester and Frost & Sullivan, and 20,000 stories daily from 6,000 Northern Light Business News sources such as *The New York Times*, *The Wall Street Journal* and *The Washington Post*. When users find opportunities or documents that they wish to explore, they can click through directly to the opportunity and associated research at the provider's site or directly to the document on the publication's site, if the desired material is from Northern Light Business News.

SinglePoint features MI Analyst – an automated meaning extraction application designed for market intelligence, market research and product research – which is designed to speed and improve a researcher's ability to analyze reports from internal and external sources, identify the strategy issues and suggest the business implications of the analyzed content. Another option, SinglePoint Connects, is a series of Web 2.0 capabilities designed to enable users to collaborate online in a variety of

ways within the portal environment. As a result, users can find, annotate and share documents in a single user interface, while the portal's authentication system enforces the business and copyright rules on document dissemination. SinglePoint Government Opportunities Edition is available from Northern Light. Pricing starts at \$96,000 per year. For more information visit www.northernlight.com.

Nielsen expands mobile and out-of-home services

New York researcher The Nielsen Company has expanded its suite of out-of-home media measurement services to cover the \$1.3 billion advertiser-based video network business. The new service, Nielsen On Location Media, is designed to provide syndicated reporting for advertiser-backed video networks in health clubs, gas stations, hotels, retail outlets, amusement parks, arenas, on airplanes and other commercial locations, which are estimated to have combined revenues of \$1.3 billion.

Networks that have committed to syndicated reports from Nielsen On Location Media include IdeaCast Health Club TV, which covers advertising in health clubs across the U.S.; Gas Station TV, a provider of TV at the pump in U.S. cities; The Hotel Networks, which is extending its Nielsen partnership to provide sponsored video-on-demand content and advertising in more than 1 million hotel rooms; Arena Media Network, a national sports and entertainment media company; Buzztime, which offers interactive entertainment distributed in restaurants, sports bars and pubs throughout North America; OnSpot, a digital high-definition network with screens in Simon Malls; and IdeaCast Airline TV, which delivers advertising and entertainment content to passengers through seat-back TV screens.

The Nielsen On Location Media reports will be distributed to all interested Nielsen agency clients for use in

planning, buying and evaluating the medium. The reports are intended to define standard Nielsen's metrics for location-specific video networks; establish report formats that will be common to all Nielsen measured networks; bring dynamic measurement with updated reporting; and provide analytics to support analysis, planning, buying and post-buy evaluation of location-specific video networks.

Additionally, Nielsen has partnered with Integrated Media Measurement Inc. (IMMI), San Mateo, Calif., to begin delivering daily all-electronic national TV ratings of television viewing that occurs outside of the home. The two charter clients are ESPN and Zenith Media.

Separately, The Nielsen Company has launched Mobile-PRIZM, an offering that combines the company's consumer segmentation and mobile media targeting tools, designed to help advertisers target mobile audiences. Mobile-PRIZM combines the resources of Nielsen Mobile and Nielsen Claritas.

For example, analysis of one PRIZM segment, Bohemian Mix (a mix of young singles and couples, students and professionals who are quick to check out the latest movie, nightclub, laptop or microbrew), shows that this group leads all other categories in mobile Internet usage, with 27 percent accessing the mobile Internet in the last 30 days (compared to an average 16.7 percent across all other segments). Besides Bohemian Mix, other key audience segments in Nielsen's mobile targeting tool include Young Digerati (affluent and tech-savvy professionals), Upper Crust (the nation's wealthiest group), Money and Brains (advanced degrees and sophisticated tastes) and The Cosmopolitans (immigrants and descendents of multicultural backgrounds). For more information visit, www.nielsen.com.

continued on p. 82

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News notes

New York research company **Arbitron Inc.** has testified before the New York City Council regarding the Arbitron Portable People Meter (PPM) radio ratings services. In the remarks of Steve Morris, chairman, president and CEO, and in documents submitted to the New York City Council, Arbitron emphasized that: the participants in the Arbitron PPM radio ratings services are as representative of the diversity of New York and other top markets as diary respondents; the fundamental techniques used to recruit PPM respondents in New York and other markets are the same as Arbitron uses for the diary; the difference between PPM ratings and diary ratings is a function of the survey tool, not the sample; PPM collects actual exposure, whereas the diary collects recall-based "habitual" behavior; the paper-and-pencil diary allows loyal listeners, of any and all formats, to overstate their habitual listening; broadcasters of all formats, including urban and Hispanic, who have embraced PPM have improved their audiences and their standing in the marketplace; Arbitron will continue to adhere to the Media Rating Council Voluntary Code of Conduct and will continuously strive to improve the PPM radio ratings service; and Arbitron remains committed to working constructively with the Council and with clients in the radio industry to address specific diary-to-PPM transition issues.

Arbitron does not believe that the FCC has jurisdiction over the company or its operations and assets and consequently lacks the authority to commence a Section 403 investigation.

Research International (RI), Chicago, has begun a new global rebranding initiative. As part of these efforts, RI is restructuring its 40,000-case innovation databases to make normative data more accessible at the local market level and launching a redesigned Web site ([### Calendar of Events November-January

Frost & Sullivan will hold its annual European customer contact conference, themed "Proven Methods for Providing Excellence in Global Customer Contact," on November 9-12 at the Hilton Barcelona in Barcelona. For more information visit \[www.frost.com\]\(http://www.frost.com\).

ESOMAR will host a world research conference, focused on qualitative research, on November 17-19 in Istanbul, Turkey. For more information visit \[www.esomar.org\]\(http://www.esomar.org\).

The IQPC will hold its customer engagement and loyalty summit on November 17-19 at the Hilton Miami Downtown. For more information visit \[www.iqpc.com/us/youthpower\]\(http://www.iqpc.com/us/youthpower\).

The Council of American Survey Research Organizations will hold its annual data collection conference on November 19-20 in San Diego. For more information visit \[www.casro.org\]\(http://www.casro.org\).

IIR will host its Voice of the Customer conference on December 8-10 at the Marriott Newport Beach Hotel and Spa in Newport Beach, Calif. For more information visit \[www.iirusa.com\]\(http://www.iirusa.com\).

IIR will host its market research for financial services conference on December 8-10 at the Marriott Newport Beach Hotel and Spa in Newport Beach, Calif. For more information visit \[www.iirusa.com\]\(http://www.iirusa.com\).

The IQPC will host a conference, themed "Youth Power 2008," on December 8-10 in San Diego. For more information visit \[www.iqpc.com\]\(http://www.iqpc.com\).

The AMA will hold its Mplanet 2009 event, themed "Navigating the New Marketsphere," on January 26-28 at the Rosen Shingle Creek Resort in Orlando, Fla. For more information visit \[www.mplanet2009.com\]\(http://www.mplanet2009.com\).

To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail Emily Cook at \[emily@quirks.com\]\(mailto:emily@quirks.com\). For a more complete list of upcoming events visit \[www.quirks.com/events\]\(http://www.quirks.com/events\).](http://www.research-</p></div><div data-bbox=)

int.com). RI has also redesigned its Global Innovation Sphere logo.

The New York branch of **Ipsos**, the Paris-based research company, has announced its sponsorship of the Principles of Pharmaceutical Marketing Research course offered by the University of Georgia Center for Continuing Education. The course's 12 modules cover fundamentals for market research professionals.

Chadwick Wilson Young, a former employee accused of wire fraud at Knoxville, Tenn., research firm **U30 Group Inc.**, has been denied his request for house arrest and sentenced to spend approximately three-and-a-half years in prison for the crime. In May 2008, *Quirk's* reported that U.S. authorities had charged Young for defrauding U30 of more than \$1.1 million in roughly four years. Young worked as the interactive Internet group manager for U30 and set out to bilk U30








using a series of e-mail accounts that were supposed to belong to customers but instead were his. "He would use his position as an employee for the U30 Group Inc. to fraudulently obtain Amazon.com gift cards at U30 Group Inc. expense and send them to several e-mail accounts that he exercised control over," according to Assistant U.S. Attorney Charles Atchley in the *Knoxville News Sentinel*. "(Young) would then convert the gift cards to his own use by purchasing goods or convert them to cash by selling them to a third party."

McCallum Layton, a Leeds, U.K., research company, has launched a new company Web site (www.mccallum-layton.co.uk).

Acquisitions/transactions

Microsoft, Redmond, Wash., has agreed to sell **Greenfield Online** Internet survey solutions, a division

continued on p. 84

<p>Looking for the right answer to a strategic question?</p> <p>All of DDW's research approaches use state-of-the-art techniques to help organizations uncover powerful and actionable insights across all strategic areas. >></p>	 <p>1 Brand</p> <p>Determine your brand's value and proposition with EquityDeveloper™. Then deploy EquityCheck™ to monitor and strengthen the equity factors.</p>	 <p>2 Product</p> <p>Maximize the impact of a new product concept with OptionDeveloper™. Select the right pathway to line extensions with LineDeveloper™.</p>
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How to avoid language problems in international IT research

In international business research, especially IT research, the content can be highly technical, with a lot of unfamiliar terms or jargon in the questionnaire. From October to December 2007, Gartner conducted a global consumer study to understand consumers' usage of and behavior regarding telecommunication technologies. A lot of time and effort went into the questionnaire, making sure that the technology terms were clearly defined and explanations were provided. The translated questionnaires were checked by industry experts in the respective regions who are also native speakers. Despite these efforts, we still encountered some mishaps in certain countries. Fortunately pilot studies were conducted and such mistakes were uncovered at an early stage.

Shown below are a number of cases that went awry (or ended up yielding very strange results!) in the field.

Case 1: Mobile instant messaging (IM) usage in Russia

Our data said: 60 percent usage of

mobile instant messaging at least once per month in Russia.

Market reality: 1 percent usage of mobile instant messaging.

What went wrong? Respondents might have mixed up IM with short message service (SMS) text messaging; 60 percent could be both IM and SMS (some early quasi-IM services were delivered through SMS, which could also cause confusion).

Measure taken: Include explanation of the difference between mobile IM and SMS.

Case 2: Mobile music downloaded in India

Our data said: 43 percent of respondents downloaded music (complete songs) using a mobile phone at least once per month in India.

Market reality: Actual number unclear, but expected to be lower.

What went wrong? Respondents might have mixed up mobile music downloading with ring-tone downloading.

Measure taken: Include additional description and explanation of what

Editor's note: Julia Lin is project manager, research data and analytics, research operations at the Singapore office of Gartner Inc. She can be reached at julia.lin@gartner.com.

mobile music downloading is.

Case 3: Access to mobile video streaming or TV in Nigeria

Our data said: 25 percent usage of mobile video clip downloads, video streaming or mobile TV entertainment (typically using the 3G mobile phone technology) at least once a month in Nigeria.

Market reality: Actual number unclear, but expected to be lower.

What went wrong? There is a possibility that respondents over-claimed the usage. Among top three mobile services operators (Glo, MTN, Celtel) only Glo offered 3G services in 2007.

Measure taken: Filter data based on mobile operator usage. Remove the relevant usage data if it is from a MTN or Celtel user.



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Case 4: Use mobile phone to access live video in China and France

Our data said: 17 percent of respondents in China currently use a mobile phone to access live or recorded video stored on other devices, such as a PC or video camera; 10 percent in France.

Market reality: Such service is nonexistent or with very little visibility in China; the actual number in France is unclear but was expected to be lower.

What went wrong? Respondents might have confused streaming live or recorded video with downloading videos from PC to mobile or uploading videos from mobile to PC, i.e., loading the videos (stored in PC) via USB I/O or Bluetooth to the mobile or loading the videos (stored in mobile) via USB I/O or Bluetooth onto PC.

Measure taken: Change “access” to “stream” and explain what stream means: play back a file while downloading it, instead of waiting until the download is complete.

Case 5: Penetration of cable and satellite TV in India

Our data said: Almost 100 percent penetration of cable TV or satellite TV in India (60 percent penetration of cable TV and 54 percent penetration of satellite TV).

Market reality: 60 percent of the nation’s television households subscribe to the cable or satellite services in India.

What went wrong? The study was conducted in metros and tier-one cities of India, where penetration rate of TV is quite high, with almost every household owning a TV.

Measure taken: Highlight the geographic coverage of the study when quoting the data.

Scare off respondents

Terms and jargon are open to misinterpretation, especially after translation; excessive use of jargon could scare off the respondents and result in lower cooperation rates. Therefore jargon should be avoided as much as possible, especially in business-to-consumer research,

when the target audience may not know industry terms. If jargon must be used, all the terms should be well-defined and thoroughly explained to ensure data quality. For personal surveys, interviewers need to be properly briefed, so that they can use the jargon correctly and confidently. A fieldwork manual including all the explanations should be prepared for easy reference during interviews.

Use of abbreviations is not encouraged, but if they must be used, they need to be explained. Never assume that the person

A pilot study should be conducted to understand what could go wrong and what preventative measures should be taken, especially in countries with historically problematic data.

being interviewed understands the terms correctly. Translation needs to be checked by professionals with industry knowledge. Though costly, back-translation is sometimes necessary in order to improve the validity of the study.

A misrepresented or biased sample can be dangerous. The incidence of usage can get inflated if, for example, the sample of respondents interviewed is skewed toward high incomes, even if everything

else was properly administered. Quotas of age, gender and household income or socioeconomic class are often necessary to ensure that data can be projected to the general population. Sometimes weight should be applied to adjust the amount of influence each respondent has on the overall data set.

A pilot study should be conducted to understand what could go wrong and what preventative measures should be taken, especially in countries with historically problematic data. Sometimes a second pilot is necessary to test whether the revised definition works or not. Interim data is also important in revealing bad data.

Solid local team

In a global study, working with an international agency with a solid local team is crucial to success. Researchers who understand the market well are able to provide valuable insights and defend the data when necessary.

When examining data from an international study, bear in mind the diversity of behaviors in different countries. A particular technology can be mature in some countries, making related terms popular and less likely to be misunderstood, while in other countries the technology can be embryonic, and more care should be given in explaining its terminology.

Even within one country there can be a discrepancy of economic and technological development in different regions, especially in big countries like China and India. It’s a common practice in commercial research that studies are only conducted in major cities in China and India; such data can not be used to extrapolate to the population and represent the country as a whole. Researchers should always put the data in the right context by highlighting the geographic coverage to the stakeholders of the research.

Last but not least, as users of the data, we need to be judicious and sometimes take the data with a grain of salt. If in doubt, always consult an industry expert. | Q

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Measuring and maximizing the ROI of a loyalty program

Do loyalty programs work? Some do. Some don't. Still, nearly 75 percent of U.S. shoppers now belong to at least one loyalty program. A marketing program for loyalty has three known goals: 1) acquire new customers; 2) keep existing customers; 3) grow these customers into larger, and more lucrative, customer categories.

As loyalty programs and their related tactics have matured, increased attention has been placed on maximizing the bang for the buck. Industry knowledge, guesswork or instinct are no longer suitable substitutes for strategic risk analysis. When marketing managers are asked how they are optimizing their budgets, specific promotions are often questioned. Marketers today are under increasing pressure from their bosses to show a greater return on investment (ROI). What gets measured gets done, as the saying goes. Budgets are limited, so how does the manager know he is doing his best?

This article is an abbreviated run-down of how a segmentation/ROI study functions. First, there is the market research/data mining component of segmentation, followed by uses

of Monte Carlo forecasting and optimization of a company's promotion.

We will use a fictional example - Colossal Supermarkets and its flagship store, Food City - to show how to design a specific loyalty promotion and to maximize its return within the company's promotional budget.

Colossal has a loyalty program that it wants to deploy for the U.S. holiday season. Food City is a regional chain, with stores concentrated in the Pacific Northwest. It wants a bigger share of the turkey and pie the locals are rushing to supermarkets to fill up on. So Colossal Supermarkets initiates a program in which all Food City preferred customers are enrolled in a new and enhanced loyalty program called Food City's Holiday Gift Bag. In all, nearly a million Food City customers are enrolled. They receive color-coded cards in the mail. Each color represents the amount of money spent on a monthly basis at Food City by each customer unit (a unit can be an individual, couple, family, household, etc.).

Food City's Holiday Gift Bag actually operates on a per-month baseline. The smaller spenders receive

Editor's note: Michael Lieberman is founder and president of Princeton, N.J., research firm Multivariate Solutions. He can be reached at 646-257-3794 or at michael@mvsolution.com.

an invitation to join at the Preferred membership level. Those who spend more at Food City receive a Gold Gift Bag card. There is a Platinum Gift Bag card, then the highest level, the Food City Mayor's Club.

Each tier is tied to a level of benefits. The higher the tier, the more extras Food City will dish out. To make the program more attractive, Colossal Supermarkets has tied its benefits to other loyalty programs, such as car rental discounts, frequent flier points on partner airlines or even discounts on menswear. Basically, the more you spend, the more you get "free."

Two stages

There are two stages to the analysis. First, determine the confines of customer segmentation. That is, where would be the best place to draw lines



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Figure 1

Gift Bag Segment Levels	Monthly Spending Range
PREFERRED MEMBERSHIP	0-\$200
	Single households, lower-income families, students
GOLD MEMBERSHIP	\$201-\$400
	Families with two or fewer children, lower middle-class income, blue-collar workers, union members
PLATINUM MEMBERSHIP	\$401-\$750
	Larger families, professionals, two-income households
FOOD CITY MAYOR'S CLUB	More than \$750
	Premium-item purchasers, private school in the area, working mothers with professional careers

among the different colors of the Gift Bag cards in order to divide up return? These customer boundaries are commonly referred to as the “efficient frontier.” This stage utilizes a mixture of cluster analysis (multivariate segmentation) and Monte Carlo simulation.

The next step: How much should each point be worth, assuming each point with the program had a cost? (For example, if one point returned a 1 percent discount, the “cost” of a point might be 1 cent) We want to set the “optimal” ratio of points to spending, so that the return on each point is maximized.

Market segmentation is a behaviorally-based statistical approach to putting respondents into baskets. Each basket is mutually exclusive, and the final basket is tied to the

amount of money each unit spends at Food City each month. Food City has been asking customers to fill out a small survey card, which captures demographics information about their food purchase behavior, which is then tied to their customer identification number. This information provides invaluable information about marketplace complexities facing Food City consumers.

The final groups are formed by combining the results of the cluster analysis, which is tied to spending amounts. These are shown in Figure 1.

Monte Carlo simulation is a method for iteratively evaluating a deterministic model using sets of statistical distributions as inputs. This method is often used when the model is complex or involves more than just a couple of uncer-

tain parameters. A simulation can typically involve over 10,000 evaluations of the model.

In a Monte Carlo simulation, a model in spreadsheet format is set up and the cells – whose values come from the survey results, customer databases, financial reports, etc. – are identified. For each of these cells, a distribution of possible values using the appropriate means and errors is specified. In other words, the shape (referred to in statistics as a distribution) of spending per month for Food City customers could be different from, say, the number of trips to Food City a given customer makes per month. Monte Carlo allows for these different distributions.

A series of trials is then generated, each one of which represents a possible outcome of the process. Instead of a simple spreadsheet that yields one answer, Monte Carlo allows the spreadsheet to run 10,000 times, each different parameter moving within its shape, given 10,000 different outcomes. When these are shown in a cumulative chart, the chances of a given outcome can be determined. For example, what is the chance that Food City customers will spend more than \$500 a month?

In our case, parameters of spending and input are set up using their customer survey and a customer database. In order to determine the output of the optimization, these spreadsheets are run, say, 10,000 times. This is called the forecast.

Input value

The goal of any optimization is to

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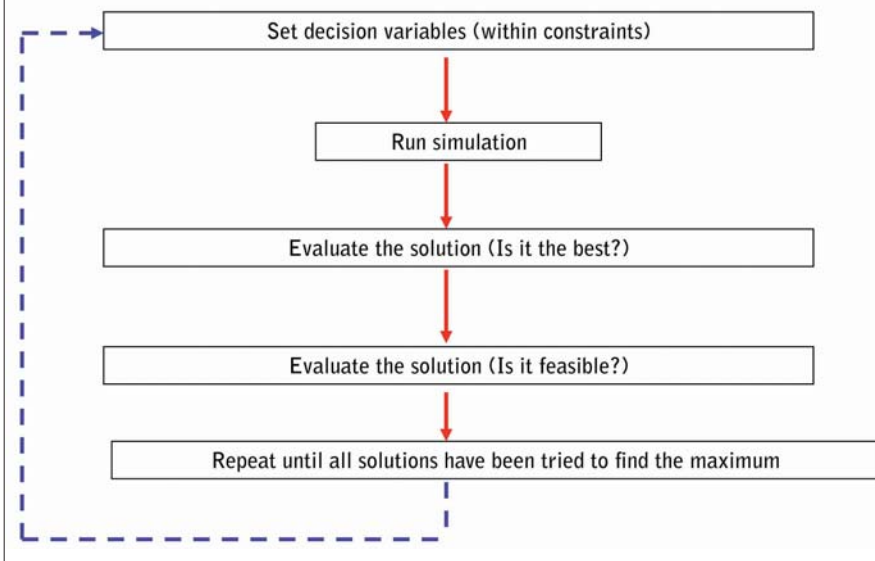


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Figure 2

How Optimization Works



determine the input value (decision variables) that make the output (forecast) as large – or as small – as possible. Figure 2 summarizes the process.

There are many applications for optimization:

- utilization of employees for workforce planning;
- configuration of machines for production scheduling;
- location of facilities for distribution;
- tolerances in manufacturing design;

- management of portfolios; and
- calculation of optimal price/promotional points.

In our case, as is often the case in ROI projects, the decision variable is the value of the points that will be rewarded for each tier in the Food City program. The forecast will be the incremental increase in spending for each value of the points.

Once all the variables are entered and the spreadsheet complete, the final step is to let the optimization software run and run. It is common for the forecast (which runs, say, 10,000 outputs), to run 10,000 times to find the optimal level.

These are the constraints that are built into the optimization process: maximize ROI; stay within the promotional budget; try to stimulate growth of all Food City shoppers.

Given the nature of customer behavior, it is natural to expect those customers in the Platinum or Mayor’s Club categories to have a higher increase in spend-



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Figure 3

Food City Promotional Design

	Monthly Spending Range	% Customers	Lower Hurdle	Higher Hurdle		
PREFERRED MEMBERS	\$0-\$200	45%	\$140	\$200		
			# Points	200	# Points	400
<hr/>						
	Monthly Spending Range	% Customers	Lower Hurdle	Higher Hurdle		
GOLD MEMBERS	\$200-\$400	36%	\$250	\$400		
			# Points	500	# Points	750
<hr/>						
	Monthly Spending Range	% Customers	Lower Hurdle	Higher Hurdle		
PLATINUM MEMBERS	\$401-\$750	14%	\$600	\$750		
			# Points	800	# Points	1,200
<hr/>						
	Monthly Spending Range	% Customers	Lower Hurdle	Higher Hurdle		
FOOD CITY MAYOR'S CLUB	More than \$750	5%	\$1,000	\$1,500		
			# Points	1,500	# Points	2,000

Final Point Value = 15 cents

ing due to the promotion. That is all well and good. However, in the market reality, the percentage of Preferred shoppers is far greater. Food City wants them to spend more as well. In addition, it is commonly understood that not everyone will redeem every point he receives. The “expected redemption” is another variable that is built into the model.

Now that the optimization is run, there are two outputs that need to be analyzed. The first is called the spending hurdle. That is, at what point do members move from one category to the next. These are not necessarily the same as the spending segments shown above, for the simple reason that spending is not static, but moves up and down depending on holidays, family, and life’s events (e.g., birth of a child, moving, promotion at work).

The second output we will look at will be the value of each point when redeemed. Remember: The name of the game is return on investment; if Food City gives away too much, that return drops.

After the optimization is complete, the top results are analyzed. A few scenarios are rerun to validate the results. Some things

needed to be tweaked so that they made market sense. For example, if the optimization suggested that the spending hurdle was \$563.35, it makes more sense to set it at \$575. If the suggested point value was \$0.0986, it makes more market-sense to set it at \$0.10. Each of these things is tested.

Once they are analyzed, final decisions about where to set the spending hurdles and the value of a point are set. Figure 3 summarizes the findings of the Food City study.

The data show that the most efficient segmentation of Food City customers occurs at the monthly spending ratings. That is, as monthly spending for each customer passes another hurdle, the customer’s behavior changes. For example, if monthly spending of a given “unit” is \$550, they are likely to be in the Platinum group (see Figure 1); perhaps a large family or a professional, two-income household. If unit spending is, say, \$850 a month, they are likely in the Food City Mayor’s Club, where they are more likely to purchase premium items, have a professional mom, and perhaps send their kids to private school.

Finally, the point value of 15 cents maximizes Food City’s

return on investment, keeping in mind how much more each level of spending will increase with the awards, and the incremental cost of giving away 15 cents a point. A good way to understand this figure is that if Food City made each point worth 10 cents, customer spending would not rise as much. If it made each point worth 20 cents, customer spending would rise, but the cost to the company would be greater. Food City makes the most money if it prices each point at 15 cents.

Cost-efficient results

As computing power increases and as marketers become more savvy (e.g., Amazon knows your favorites), it becomes easier to facilitate an optimization project like Food City’s. Experience has shown that implementing the new technique, and other risk-analysis measures, can have a high learning curve but ultimately yield effective, cost-efficient results.

The marriage of survey research, data mining techniques, the Monte Carlo method and optimization can take more and more of the risk out of developing these promotional programs and can improve ROI for marketing managers in almost any industry. | Q

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By Matthew Harrison and Alaric Fairbanks

international research

Meeting Western needs in an Eastern setting

For companies wishing to conduct or commission research in China, the opportunity is enormous. Here we have a huge, diverse, growing, increasingly affluent and innovative economy, which is eager to share its ideas with potential investors. China might not be the easiest country in which to conduct research, but for the research buyer, the value of the information obtained is likely to be substantial.

This article seeks to provide the reader with a picture of how research, particularly business-to-business research, is conducted in China and the issues that should be borne in mind when commissioning research in the country.

We will define business-to-business research as market research in

which the views of businesspeople are sought in order to facilitate a business decision. We include not only businesspeople in the traditional sense but also anyone else who contributes to a study in the context of their employment. We therefore include, for example, projects in which the views of government officials (of which there are many) are sought, and medical or pharmaceutical

projects in which organizations seek the views of physicians or surgeons.

Estimates of the proportion of Western market research markets accounted for by business-to-business research usually put the figure at around 10 percent. In China, however, the proportion is estimated to lie at around 25 to 30 percent. It is this business-to-business sector of the market that is expected to see the most growth over the coming years, with Chinese companies increasingly open to the idea of obtaining the views of businesspeople, and Western companies more and more hungry for Chinese business opinion.

An overview of business-to-business research in China

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No clear record

It is worth noting at this juncture that the concept of business-to-business research within China is even newer than the concept of consumer research. There is no clear record of exactly when or how this part of the market developed. Beginning around the mid-1990s, the market appears to have evolved gradually, as projects commissioned to explore consumer opinion gradually incorporated the views of businesspeople. Since the turn of the millennium, there has been a surge in business-to-business research and many of the senior people within Chinese agencies who previously led operations within Hong Kong have moved to the mainland.

Across industries, the type of research commissioned is markedly different from the situation in Europe and North America.

In the West, research reflects the objectives of companies operating in mature markets who want to establish customer loyalty, achieve differentiation through branding, monitor the satisfaction of their employees, develop new concepts or segment their target audience. Typical research projects are therefore customer and employee satisfaction studies, branding studies, concept tests and segmentations.

In China, the picture is very different, in that a high proportion of research projects (around 60 percent) are focused on market assessment studies, in which clients (often foreign companies) are asking for a comprehensive explanation of how markets are structured, who are the key players and what is the market size. Whereas in the Western economies research buyers generally seek intelligence that will help them progress in existing markets, in

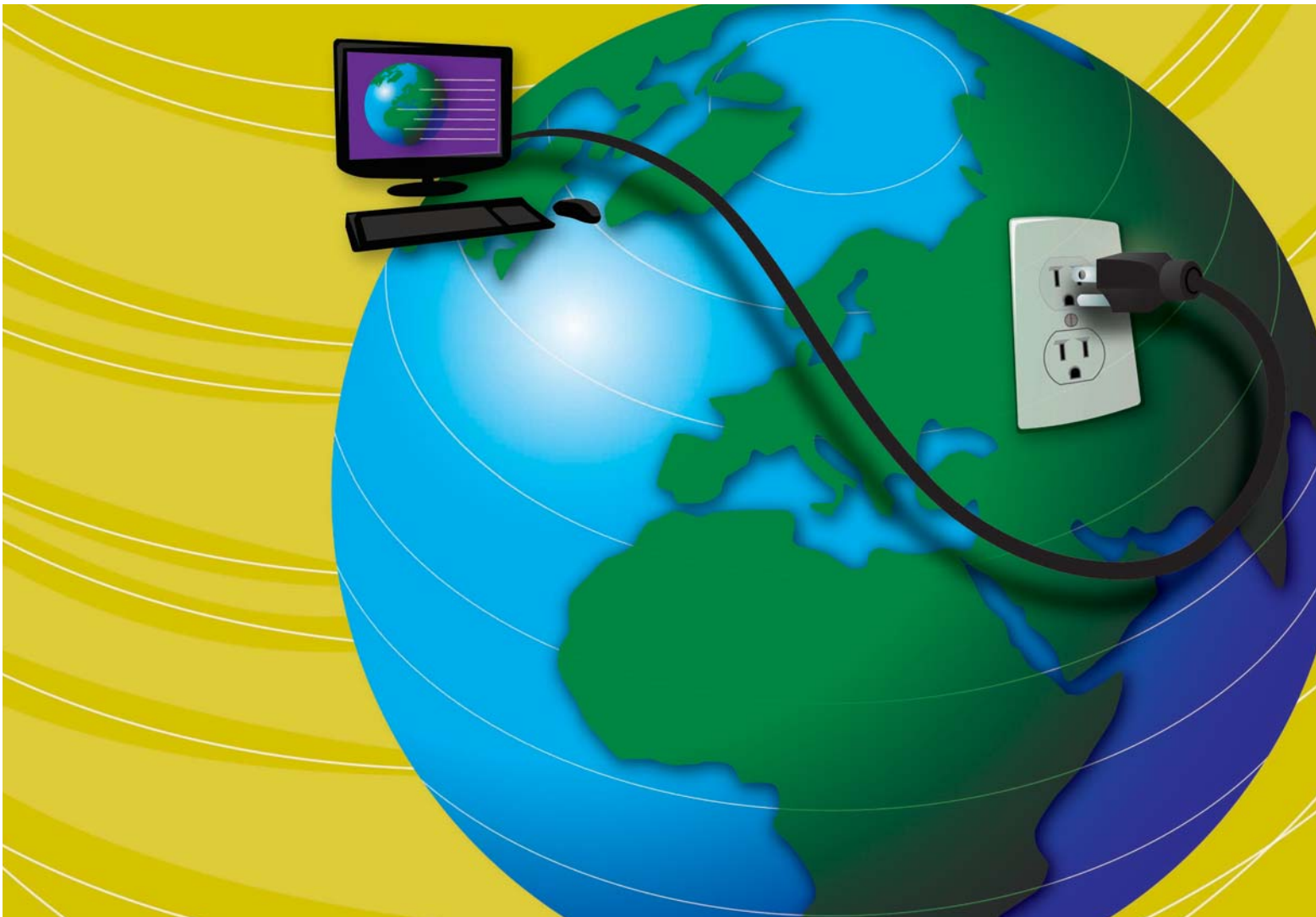
China much of the research is about entering new markets or indeed entering China itself.

Lower risk

Any company seeking to commission research is advised to stick to the national and international players, where the research is of a high standard and there is a much lower risk of the agency running into difficulties.

No matter which supplier you choose, they will likely have to rely on the network of local fieldwork agencies and “one-man bands” that do most of the respondent-level data gathering.

With the exception of one or two newly established offshoots of foreign agencies, these companies are largely provincial rather than being located in the leading cities of Beijing, Shanghai or Guangzhou. The companies fall into two main categories: (1) companies focused entirely on fieldwork,



as opposed to full-service fieldwork agencies who design and analyze research, and (2) one-man bands who may offer a kind of full-service offering but where every aspect of the business is based on one or two people. A third, less prominent group is small companies with a broad remit, of which occasional market research interviews are a small part.

The first group, the local fieldwork agencies, is critical to the survival of the whole industry, as these are the foot soldiers of the industry, the companies that collect most of the information from outside the big cities on behalf of the larger agencies. In many cases, any company buying research from a national or international agency is relying not only on that agency's intrinsic research capability but also on the quality of its network of local fieldwork agencies. Put simply, many of the larger companies subcontract most fieldwork that is located away from their base. It is recognized more or less universally that no one agency can research every single part of a country as

vast as China. As a result, companies in the Chinese research industry have a higher degree of interdependence than similar companies elsewhere in the world.

There are at least 1,200 local fieldwork agencies and one-man bands, 80 to 90 percent of which turn over less than 1 million RMB (\$150,000) per annum. Essential as some of these companies are, and accepting that many are of good quality, it is unlikely that such agencies will be user-friendly in terms of dealing with Western organizations. The ability to speak good English is extremely rare, and this part of the market should essentially be regarded as part of the agencies' supplier base, rather than agencies that are likely to meet the needs of clients in business.

In summary, there are less than 50 full-service research agencies in China with a national capability, and as already stated, this national capability is obtained through networks rather than in-house resources. If regional players are included, there are maybe 100 full-service agencies in the coun-

try. This relatively low number of market research agencies is indicative of the fact that we are talking about a relatively embryonic industry.

High-level view


We hesitate to generalize about the "typical" agency, as every Chinese agency has its own unique points, just as would be the case in any other country. Nevertheless, we feel it is useful to present the reader with a high-level view of what a typical Chinese research agency with national capability looks and feels like.

As already discussed, no agency has in-house fieldwork coverage of the whole of China. However, most major agencies do have three offices – one in each of Shanghai, Beijing and Guangzhou. Head offices are spread across the three cities, although there are more in Shanghai than in Beijing or Guangzhou. Companies with a strong business-to-business focus tend to be headquartered in Beijing, reflecting the importance of speaking to government officials in such studies. The most common model is for the majority of research executives and management to be located at the headquarters office, with a limited management presence at the other two offices. It is common for the Guangzhou office to consist of fieldwork operations only, the role of this office being to cover the requirement for Cantonese interviewing in Southern mainland China and Hong Kong. Clients will find themselves liaising with just one office, depending on the location of the executive carrying out their particular project.

Most agencies are located in tower blocks, usually near to the city center. Offices are almost always equipped not only with a set of CATI stations but also with an in-house focus group viewing room. This is in contrast to most U.K. agencies, which rely on specialist external viewing facilities.

Emphasis on quality

The big-city Chinese research agencies place an extraordinary emphasis on quality. Whereas, for example, U.K. market research standards decree that 5 percent of all interviews conducted should be listened-in to, it is not uncommon for Chinese




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agencies to listen to 50 percent or more of telephone interviews as they take place, with recordings of the remaining interviews also listened to. Agencies often read through every single completed questionnaire, insisting that respondents be re-contacted as appropriate. Full-time quality management teams often number six or seven people.

This focus on quality is complemented by an embracing of new technology, which agencies use to their full advantage. Indeed, technology is an integral part of the quality-assurance process, with digital recording of interviews and randomized monitoring systems used for telephone fieldwork. Face-to-face interviewers typically use MP3 players to record their interviews. Significantly, there is no secrecy law in China, meaning that interviews can be recorded without the knowledge of respondents. There is, however, an increasing tendency for respondents to be made aware if they are being recorded, as agencies recognize the importance of maintaining the trust of target markets (this is particularly the case in business-to-business research).

Quality is such a key issue for Chinese agencies that research buyers may well find themselves having company quality procedures recited to them during the initial stage of scoping a potential project. With such a focus on this issue, potential research buyers should be reassured about the very high reliability of research produced by the national and international agencies in particular.

Reliance on face-to-face

Data collection in China, and indeed elsewhere in Asia, has traditionally been distinct from that in Western countries, in that there has been a reliance on face-to-face interviewing in consumer and business-to-business research alike. It is estimated that in the year 2000, around 90 percent of all research interviews were conducted in this way. Since the turn of the millennium, the role of face-to-face interviewing has decreased markedly however, and it is currently estimated to lie at just over 60 percent. This is of course significantly higher than in most Western research agencies,

where less than 10 percent of all interviews are conducted face-to-face.

The use of face-to-face interviewing is particularly prominent in relation to certain target respondent groups. In business-to-business research, the more senior the respondent, the more likely he or she is to require a meeting to discuss his or her views on the market. Middle- to senior-level managers and most government officials are the main respondent groups to fall into the face-to-face category. This

is partly due to respondents' natural curiosity as to whom exactly they are giving information, but, perhaps more importantly, also due to a cultural perception that high-level discussions merit the time and effort that goes into a face-to-face meeting. It should be noted that this perception is often as prominent within the research agencies as it is among target audiences.

The view that important discussions "deserve" to be conducted face-to-face is well illustrated by the



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fact that, in complete contrast with research conducted in the West, it is extremely common for business respondents to come to the premises of the research agency in order to participate in the research. Such interviews typically take place in the agency's focus group viewing room, and are often observed by clients. Usually, a thank-you is presented to the respondent in the form of a small financial incentive (this is far more common than in Europe but less so than in North America). This approach is good news for the client, who can expect to receive a DVD recording of the interview in its raw form, and of course the fact that the interview takes place on-site means that it is subject to all of the usual quality procedures.

The main reason for the trend away from face-to-face interviews is the growing understanding and acceptance of market research among Chinese target respondents, who are increasingly willing to discuss business and other matters over the telephone. The market research industry is becoming increasingly respected within China, and, in contrast with Western markets, access to respondents is increasing rather than decreasing.

Focus groups are used in China, albeit less so than in Western markets. There is an almost unanimous view in the market that Chinese respondents – particularly businesspeople – prefer to provide information on a one-to-one basis rather than in the company of their peers. The exact reason for this is unclear, although the balance of opinion suggests that this is a cultural issue more so than a matter of concerns about confidentiality. When focus groups are conducted, they are commonly carried out in a mini-group format of three or four people; groups of eight to 10 respondents are very rare.

While Chinese agencies are extremely techno-savvy, the only technological area in which they tend to lag behind their Western counterparts is in their use of online data collection techniques. This appears to be due to the relatively low Internet penetration in

China, and in particular the lack of familiarity of the target audience with the very interactive sites that are necessary for data collection.

Currently, online surveys are limited to certain groups such as IT managers and teenagers, and online focus groups are yet to be introduced to any audience. Agencies are so unconvinced of most respondents' ability or willingness to take part in Web surveys, that, when asked by Western agencies to conduct the Chinese element of an international online survey, they have their interviewers conduct telephone interviews with respondents. As the respondent provides his or her answers over the telephone, the interviewer enters them into the online survey.

No great reticence

The subject of what can and cannot be researched in China is a contentious one, and is a subject around which a number of urban myths appear to have developed. The truth is that there is very little difference between what can be researched in China and what can be researched in Western countries. Culturally, there is no great reticence in terms of providing information, and as the Chinese become increasingly aware of market research, obtaining their views is becoming easier.

Most of the areas in which it is difficult to obtain information are similar to those in the West. Company financial data, such as profit and loss information, is an obvious example, and this can be as much to do with a lack of knowledge as a lack of willingness on the part of the respondent. It is true that certain areas of social research are closely monitored, as are attempts to seek details from government on contentious issues. The government is, however, seen as more of a help than a hindrance by most agencies, particularly due to its comprehensive documentation of regulations, policies and industry trends, all of which make environmental analysis of a market far easier than in most Western markets.

Perhaps the key fact to remember is that Chinese agencies are not in the habit of promising information that is impossible to

obtain. On the few occasions that cultural, legal or practical issues make obtaining a certain piece of information impossible, agencies are usually extremely frank in stating what can and cannot be achieved.

Two key trends

Over the next five years, two key trends will happen in terms of data collection. Firstly, it seems certain that the move toward more telephone-based fieldwork will continue, as acceptance of this method increases among the target market and clients alike, and as demand for research outside the main cities grows. Within a five-year time frame, telephone interviewing will constitute the main data collection method in China. However, face-to-face interviewing will remain prominent, as it is firmly entrenched in the culture of research in China, and, it should be mentioned, not enormously more expensive than telephone interviews (this is certainly not the case in Western markets, where face-to-face interviews can be at least 10 times more expensive than telephone interviews). Secondly, the emergence of the Internet as a viable means of data collection appears certain to occur, again based on the acceptability of this method to clients and respondents alike. The high demand for large-sample projects within China means that Web surveys will be the first and the most widespread of these techniques, with substantial growth predicted to begin within two years.

Daunting task

The language issue alone makes conducting desk research in China a daunting task for Western organizations, and this is frequently added to with the complaint that desk sources in China are hard to come by. While the language issue is beyond doubt, there is no lack of desk resources for the researcher.

In fact, if it is industry statistics and details of regulations that you are looking for, then it is doubtful that any country makes more information available than China. The National Bureau of Statistics (www.stats.gov.cn/english/) provides economic information for

free on a monthly basis. The National Development and Reform Commission puts in place regulations designed to develop different Chinese industries, and these regulations can be found on <http://en.ndrc.gov.cn/>. A whole host of ministries and administrations exist within the Chinese government, all of which are listed on www.china.org.cn. Many of these will provide information on the industries and activities within their jurisdiction, either online or sometimes through direct contact. Increasingly, information is provided in English and other European languages.

In addition to direct government departments, most industries within China have at least one association, which will be closely related to government. These associations are excellent sources of market information, and indeed of potential target companies within their industries. Chinese agencies all possess the Chinese government's massive and thorough two-volume directory of government departments.

In terms of search engines, the main tools used are www.google.cn and www.baidu.cn.

As with primary fieldwork, researchers operating within China must steer clear of certain information areas, relating in particular to government and social policy.

Developed enormously

Data analysis techniques have developed enormously in recent years, with techniques such as customer satisfaction and segmentation statistics commonplace (albeit less commonplace than in the West). Agencies typically have in-house data processing and quantitative analysis departments, often consisting of around half a dozen people. Some of these departments contain an advanced statistical analyst; others rely on outsourced labor for what is still a relatively rare requirement.

Agencies also have an increasing ability to provide strategic insights in their research projects. Indeed, the line between consultancy and market research is rather blurred in China, and many companies have business licenses for both activities.

To an extent the requirement for strategic conclusions has been driven by Western organizations, with a number of Chinese agencies stating that Western clients "demand more insight, whereas Chinese clients prefer to provide the insight themselves." Whether this is true or not, it is certainly the case that many of the leading Chinese research agencies are on a par with their Western counterparts in terms of their ability to provide strategic insights.

Great potential

This article has sought to introduce the reader to the main characteristics of the Chinese market for market research, and above all highlight the great potential for any research buyer to consider commissioning market research in this fast-growing market. With the right agency, research in China is good-quality, detailed, insightful, cost-effective, and, above all, an excellent aid to decision-making. | Q

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Here, brand obits may not work so well

The spectacle of the 2008 Summer Olympics in Beijing opened the world's eyes to the vast beauty and unique culture in China. It is a country steeped in centuries of tradition and social customs. The event also marked a turning point - a coming out of sorts - that was designed to demonstrate China's rapid ascension on the world stage.

China's influx of capital and influence can be attributed to two primary factors. Economic reforms instituted in the late 1970s are reaping big dividends - China now boasts the second-highest gross domestic product in the world and has experienced an average of about 10 percent annual economic growth for the past 20 years. For many large global businesses, a presence in China is almost a foregone conclusion.

In addition to economic change, China is in the midst of a cultural sea change. In simplified terms, there is a marked difference in the attitudes of those 50+ years old as compared to the younger generation. The more than 300 million Chinese between the ages of 14 and 28 are more affluent and relatively unaffected by the difficulties of the past. That has created a more aspirational and freethinking generation.

China's rapid growth and expansion has many benefits, of course. But with growth comes a multitude of challenges. For qualitative researchers, understanding the Chinese social and business culture is critical to the success of qualitative research programs conducted with Chinese participants.

In the last five years, qualitative research has grown 20-30 percent in China - recognition of the importance of understanding consumer motivation in a changing and increasingly consumptive culture. For example, there are more than 2,000 brands of shampoo in China, so an increasing number of those brands are embracing the importance of understanding customer motivation and how qualitative research can help them achieve insight and a competitive advantage.

This growth, while encouraging, has had both positive and negative outcomes for researchers, participants and clients. Following are some of the most common challenges qualitative researchers face when conducting projects in China.

Effective qualitative research in China requires understanding of customs, cultures and techniques



By Steve Richardson

Editor's note: Steve Richardson is director of communications for the Qualitative Research Consultants Association. He can be reached at steve.richardson@qrca.org.



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Fake documents

An increasingly entrepreneurial economy has led to the emergence of professional respondents who make a living from repeated participation in qualitative research. Known as worms in Chinese, they are often qualified to participate, but their frequent participation results in “model” answers that don’t deliver the deeper insights being sought. There are also non-qualified respondents who fake documents, use multiple identities and even coordinate these activities in small groups.

Hamish Liu, a QRCA member and managing director of Beijing-based Force Research, tells of one real-life example where a respondent’s briefcase included 15 different identification cards, four driver’s licenses, two different housing certificates and three medical certificates showing he had diabetes, asthma and heart disease. The more than 20 business cards he carried showed him as, among other jobs, a university professor, manager, engineer and merchandiser. His cell phone received redirected calls from

seven different phone numbers. In reality, the man was jobless and in perfect health. His job was professional respondent.

Being aware of respondent quality issues is the key to overcoming them, says Hong Kong-based researcher David Ho, a QRCA member and research director of Market Strategies International. “These problems are introduced into projects either because the field partner is incapable, or because staff members know the problem but still recruit such people to fill slots. It is critical that field partners in China be carefully selected and this issue be addressed directly with them in advance,” Ho says.

To further combat the problem, researchers are developing more aggressive “proof questions” that help them screen out unqualified participants. For example, if a respondent says he or she drives a certain car brand, the researcher might ask a question about a feature of that car that does not actually exist. Only prospects who question the car feature are allowed to participate. In addition,

researchers are improving the databases that document professional respondents in order to screen them out.

Sprouting up

With the explosion in growth of qualitative research the last few years, qualitative research companies are sprouting up throughout the country. Because the point-of-entry cost is low to start a research business, moderator quality and experience can be an issue. “To be considered a market research company in China, the only requirements are an office, a couple of computers and some pens. Even individuals without any market research background can start up a market research firm in China,” Liu says.

He adds that appearance is sometimes mistakenly valued over experience. “It doesn’t take a huge investment to get a business set up, but clients should spend a good amount of time doing due diligence to be sure they are hiring a qualified researcher.”

As one might expect, language can be an issue regardless of whether the qualitative researcher is Chinese. Like many countries, China has multiple dialects and regional language varieties. “Average Chinese speakers perceive Chinese as a single language with numerous dialects such as Cantonese or Mandarin. But these dialects are often very different,” Ho says. “For example, to the untrained ear of a Mandarin speaker, Cantonese or Taiwanese feels like a foreign language. Sometimes, not even one word in a sentence can be understood.”

Eileen Zhang, a QRCA member and founder of Shanghai-based Joinsight Market Research Associates Inc., adds that since consumer behavior varies greatly geographically within China, researchers must carefully consider how to use the proper language to communicate with local consumers.

In addition to the spoken word, translations can be challenging - and expensive. In some areas, qualified interpreters can cost \$1,000 per hour. This cost sometimes drives researchers to less-qualified interpreters, where accuracy may be compromised. The translation problem can be exacerbated by using different interpreters in different cities. “Accurate translation gets



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very complicated when multiple interpretations are being done and some interpreters are qualified and some are not," Liu says. "One great way to combat this is to hire only one qualitative researcher and interpreter, even if you are going to multiple cities. That will help ensure the consistency of interpretation and translation."

Can be difficult

Chinese people over the age of 50 are not used to speaking freely - they are used to following opinion leaders. They were raised in an age of group-think, which values consistency, conformity and order. Therefore, creative thinking and sharing personal opinions during qualitative research can be difficult.

The exchange of views that is often encouraged in focus groups can make older participants uncomfortable. They will seek to avoid conflict and will not effectively participate in debate, especially with participants who verbalize strong opinions.

But Chinese culture is changing rapidly. "Younger generations are increasingly globalized or

Westernized," Ho says. "Chinese people in their teens, 20s, 30s and 40s all display a significant difference in terms of background, lifestyle, habits and values. They are more independent thinkers."

For instance, teenagers and those in their 20s are often used to having many product choices, and they make decisions based on satisfying their individual desires or expressions of personalities. People in their 30s and 40s grew up in the pre-economic reform era and had less abundance of goods. They are used to having fewer choices and they emphasize getting good value for their money. Such differentiation in age has to be considered in qualitative research design.

Central concept

The Chinese term *guanxi* means "relationships" or "connections," and is a central concept in Chinese culture. Guanxi is important for qualitative researchers - and anyone doing business in China - to understand, because it reverses the Western business tradition of "business before pleasure." In China, it is "pleasure before business."

In practical terms, this means that qualitative researchers and clients socialize and become well-acquainted before work is discussed. While not particularly hard to overcome, it is important that this concept be respected and practiced with Chinese businesspeople.

Wildly different

Recruitment firms vary in size and in the quality of their work. These facts, coupled with the problem of professional respondents, make it critical that qualitative researchers to spend enough time to examine their recruiting agencies for a proper fit for the project.

Liu says one way to address this concern is to hire local recruiting agencies in the markets in which you are working. Local agencies understand the local customs, language and business practices of that area. This should make them better able to design practical screening processes.

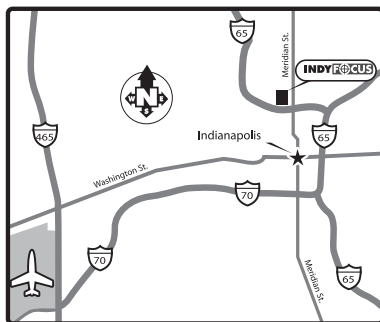
Adapt techniques

Qualitative researchers should be aware that, due primarily to cultural differences, research techniques popular in

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the Western world may or may not be successful with Chinese participants. A good qualitative researcher should be able to adapt almost any technique, but here is a look at a few of the approaches and why they may or may not work in the Chinese setting:

Laddering – The technique of starting depth interviews with questions about external objects and external social phenomena and then proceeding to internal attitudes and feelings can sometimes aggravate Chinese participants.

Brand obit – The projective technique where respondents are asked to write an obituary on a product, service or company in order to capture their opinion of the product's personality could be a challenge because the technique is about death, and talking about death is considered unlucky in Chinese culture.

Solar system/planet game – This specific version of the technique may not work because most Chinese are not familiar with the planets and solar systems. But similar, relatable, techniques can incorporate Eastern culture, such as yin and yang or the five elements in nature (metal, wood, water, fire and earth), which are commonly understood in China.

Role-playing – This expressive technique works well because the Chinese are typically polite and reserved with their true opinions, but when they are “playing” someone else, they are more likely to express their real feelings and opinions.

Sentence completions/letter writing – Respondents can fill in holes in sentences and not answer direct questions, allowing them more freedom to express themselves honestly.

Indirect techniques – For projective techniques, the most effective techniques are those in which participants are not asked to express their opinions directly, but rather answer from a third party's point of view. This removes the pressure and discomfort associated with direct and strong opinions.

Selecting a partner

The qualitative researchers interviewed for this article suggest the following tips for selecting a market research partner when working in China.

Respect Chinese culture and traditions. Do not try to impose Western standards and practices on Chinese participants. Understanding which research techniques work and which ones don't will enhance the quality of your findings.

Build a basic understanding of the country. Just as you would need to understand regional, cultural and language differences in the U.S., understand the basics in China as well. A significant amount of useful information is available online.

Pick one. When possible, choose one qualitative researcher and translation expert regardless of how many Chinese markets you utilize for your project. This will maximize the accuracy of the insights gained.

Select partners carefully. The quality, cost and experience of research partners, recruiting agencies and translators varies greatly. Do your homework and save time in the long run. “Choose a good and qualified local partner, and then trust them,” Zhang says. “We understand Chinese consumers and markets deeply, and translating the psychology of the consumer is something the local partner should be heavily involved in.”

Insist on experience. A qualified, experienced qualitative researcher is necessary for communicating with respondents in a casual manner and effectively directing groups and interviews. | Q

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From an old order, a new frontier

In the last decade, Russia's economy and the disposable income of Russian consumers has grown steadily, attracting the attention of multinationals and their global marketing research departments. Like the launch of Sputnik in the 1950s, the rapid ascent of Russian economy in the past decade has taken many by surprise. The chaos of the 1990s has been replaced with a previously-unseen level of market efficiency and growing prosperity across much of Russia. As marketers, we have witnessed the country undergoing a dramatic repositioning from the grayness of scarcity, turmoil and food lines to the glitter of advertising, an abundance of supermarkets and expensive cars clogging the streets. The swing from poverty and despair in the late '90s to the optimism and national pride of today have brought Russian consumers rapidly into the flat world of the 21st century.

One of the primary indicators of this explosive growth is disposable income: Russian disposable income has risen by 27 percent every year since 2000. Multinational companies have paid close attention to the emerging Russian market (as well as other BRIC [Brazil, Russia, India, China] countries) as mature markets slowed in growth. Russia is expected to surpass Germany as Europe's largest consumer market by the end of 2008. As companies' interest in Russia increases, so does their need for information about the growing market, especially as consumers have more choices and the market becomes more competitive. A burgeoning

Russian marketing research industry has evolved to help meet this need." There is an increased importance of market research overall, and more decisions based on consumer feedback," says Lyudmila Krokhina, consumer and market insights director for the Wrigley Company in Moscow.

While marketing research overall has been rapidly growing in Russia throughout this past decade (with the growth rate peaking in

2005 at 28 percent), online marketing research is a relatively recent development. Just as we saw in the U.S. during the 1990s, the transition to online research requires both time to gain acceptance and a critical mass of consumers being available online. Today, the global research community has grown more comfortable and familiar with online research. Many have gone from being skeptical about this methodology to embracing it, and for most it is now just another tool in their toolbox. The expansion of Internet penetration in Russia now allows us to leverage the cost and speed benefits of online research, just as we've

Tips on conducting online research in Russia

By Misha Neverov
and Robert Schieffer

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been doing in the U.S. and Europe for the past several years.

The move toward online research couldn't have come at better time. In a market that spans 11 time zones and has only 58 percent landline telephone penetration, face-to-face interviews lack national coverage and telephone surveys have their own set of challenges. The fixed-line industry has not been privatized, so some of the regional phone companies connect only 20-25 percent of their licensed consumer base and are plagued by long delays in installing lines, reminiscent of the socialist era.

Come together

So as Russia's marketing research industry has grown and the online population in Russia has grown, the two have inevitably come together. But how does online research in Russia differ from that in other geographies?

The first question in any discussion of online research in Russia revolves around the level of Internet penetration. So, among the 142 million Russians living in Russia, exactly how many access the Internet?

Answers vary by source, due to differences as basic as methodologies used and as fundamental as the definition of an Internet user. The Russian Public Opinion Foundation (FOM, www.fom.ru), in its quarterly The Internet in Russia study, uses the following methodology: large (34,000 respondents) stratified random sample of adults 18 or older drawn from 1,950 cities, towns and villages from 68 out of 89 federal districts (covering 94 percent of the population). These studies, conducted since the summer of 2002, segment Internet users according to frequency. As of this writing, the latest published FOM tracker, spring 2008, puts the daily audience for the Russian Internet at 15.7 million users, and the weekly audience at 25 million users. More familiar to U.S. readers, comScore measurement pegs the number of Russian Internet users at 17.5 million (as of June 2008).

While the exact level of Internet penetration is subject to debate, most agree that the Russian online population is growing quickly,

with comScore reporting 27 percent year-over-year growth (as of June 2008). The northwest region, which includes St. Petersburg, has 26 percent Internet penetration. The Moscow metropolis, with its population of over 10 million (7 percent of the entire nation), has the highest incidence, with an Internet penetration of 42 percent. High-speed Internet is also becoming very popular: the number of broadband-connected households increased at a rate of 98 percent in 2006 and is expected to continue to increase by over 50 percent in the near future. Some project that around 25 million households, half of the country's population, will be broadband subscribers by 2012. Currently, over 5.5 million Russians have broadband service.

The second question for someone new to online research in Russia would be: What does "representative" mean for a Russian sample? The Russian Federation has a highly heterogeneous population, so to exhaustively reflect all of Russia's widespread territories, a sample would be comprised of people from at least all eight regions, if not each of the 89 federal districts, and balanced across age, gender, socioeconomic class, education, etc. However, most research tends to focus on the major metropolitan areas on the country, primarily because spending power is highly concentrated in few cities.

Furthermore, retail distribution is (at least for now) still fragmented among several chains, unlike Wal-Mart's countrywide retail distribution in the U.S. Chances are your company, or your client's company, is not interested in comprehensive geographic representation, but in specific regions being targeted. Historically, a typical market entry into Russia would commence with establishing business in Moscow, followed by St. Petersburg, then expanding to regional cities. Moscow, besides harboring most of nation's wealth, also has the highest Internet penetration, making it a good sub-market for online research. As Moscow real estate prices continue to skyrocket,

it is interesting to note the emergence of alternative entry strategies: for example Carl's Jr., heavily preempted by McDonald's, Subway and other chains, chose to enter Russia by opening restaurants in St. Petersburg first.

Our experience in Russia has shown that its citizens, excited about the variety and choices that the last few years have brought, are eager to share their opinions when the online interaction is appropriately facilitated. Response rates on many Russian panels are over 50 percent, and can go as high as 70 percent depending on the survey.

Some caveats

Naturally, there are some caveats to keep in mind when conducting online research in Russia. Internet adoption has occurred similarly to adoption in other countries - those who were first to be online were young, educated and wealthy. But some of the hard-to-reach demographics are inverted compared to U.S.: young males are not particularly difficult to reach compared to women over 35. "The Internet is focused on the most active part of our population ... it usually enrolls younger respondents more open to innovation ... therefore, if this audience is your target indeed, the Internet is just the tool you need," Krokhtina says.

Groups that tend to be under-represented online include older, less-educated and less-well-off consumers. The male/female ratio is inverted online compared to the general population. Response rates will vary by demographic as well: expect lower response rates from people over 40, as they are less comfortable with the Internet. There are strong cultural gender roles. Women carry a highly disproportionate share of household responsibilities, leaving working women with even less time to respond to surveys.

The right project

When trying out an unfamiliar methodology, often researchers are looking for the right project to experiment with. Projects that are not top priority, that are low-cost, that

are “nice to have” – or any combination of these – are often the first that researchers assign to an online method. But, Krokina says, “Even in those cases, we’re so limited by the time pressure that in the majority of cases, we have to look for standard solutions which require the least discussion or carry the least uncertainty.” While the Internet is a faster method in field time and analysis, the internal discussion and debate over conducting online research in Russia can lengthen the time it takes to conduct a project, at least until the company is comfortable with the method.

One way to overcome that is to begin looking at the methodology early internally, even before the right project comes along. By gaining alignment on when and how the online methodology would best fit in your industry, when the right project comes along, the team will be ready for it. Another strategy is to have an early discussion with online research companies to better understand how your standard studies can be converted to online (typically, that only requires

some questionnaire adjustments and some programming). Finally, a best practice would be to conduct parallel tests using both the online and offline methods. Changing methodologies often creates new absolute benchmarks and norms, but investing in parallel studies provides the opportunity to normalize the data across methodologies and thus limit the impact of this change.

Other tips:

- When talking to a general audience, avoid graphics-heavy pages, as a large portion of respondents still access the Internet through dial-up.
- In ranking questions, use a 1-5 scale, with 5 being the high end of positive. The Russian school system uses 5 through 1 as grades, similar to A through F in the U.S., with 5 having a strong association as good/excellent.
- Just as in any non-English market, when starting from an English questionnaire, translate the questionnaire to Russian and then back-translate from Russian to

English. While a bit time-consuming on the front end, this step can save innumerable headaches on the back end.

Competitive advantage

The best time to consider an investment in understanding the needs, attitudes and preferences of the Russian consumer is now. Gaining this insight could provide your firm with a sustainable, competitive advantage in this important, growing global market. | Q

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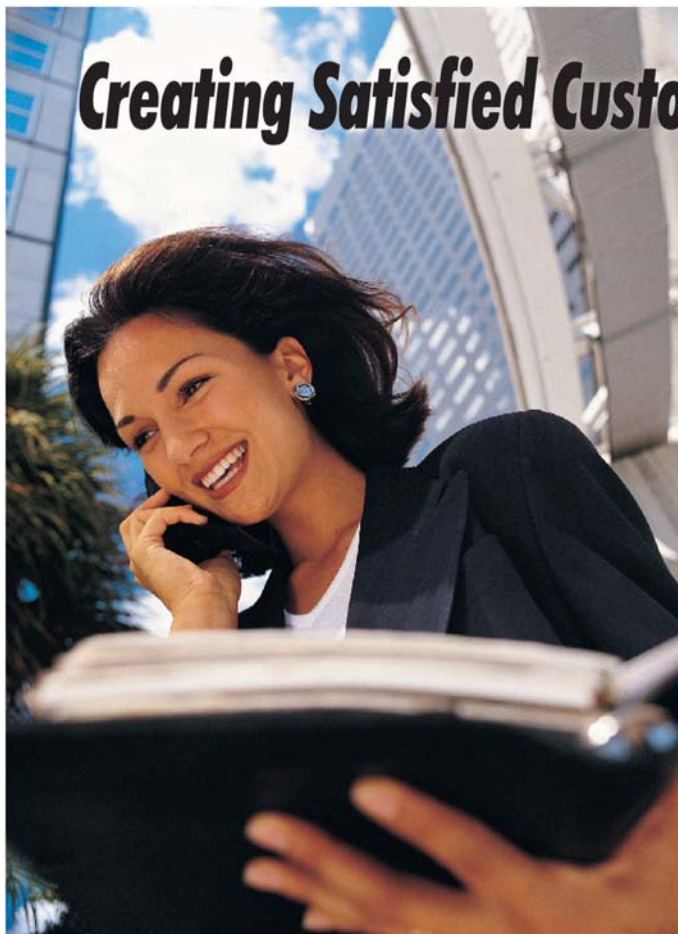
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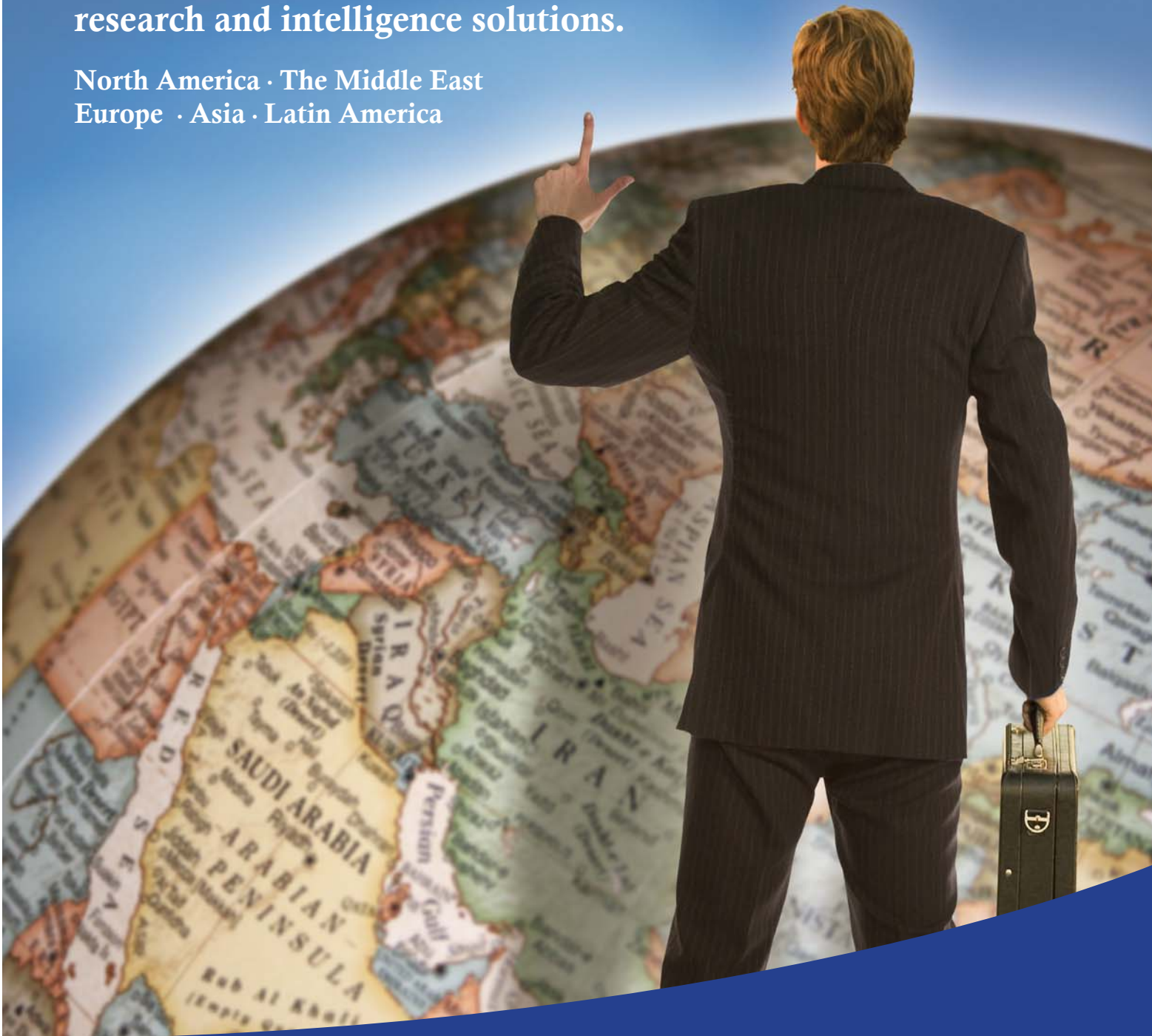


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hopelessly skewed. Plan for time to acclimate yourself, once you arrive in the country. Traveling to your destination over a weekend can be helpful if you have a tight schedule.

Managing expectations. Expect that establishing specifications and getting the costs back is going to take more time than putting together domestic costs. Certain follow-up services you are accustomed to in the U.S. may not be provided in the host country. Confirmation letters, reminder calls and other important details will take time.

Choosing a facility. Locating the right facility for conducting your research requires that you be flexible. If a survey center isn't available, consider using a hotel or a classroom. Ascertain the location of the facility, the size of the room and any technical specifications. Also, be sure that recruits will be able to get to the facility location. In some countries, facilities may be so inadequate that it makes sense to establish your own.

Technical compatibility. Determine that the technology you will be using abroad will correspond to your technology back at home. Find out what kind of equipment will be available to you. Is it NTSC, PAL or SECAM? Does the facility you are using have the resources to broadcast the survey group in both English and the native language? Be sure you will have a way to transmit questions to the translator if he or she will be sitting in a different room than you.

Budget. Costs to do the same work in different countries can vary greatly. A project in Japan, China or the U.K. can cost more than twice as much to complete as the same project in the U.S. When budgeting, include the time you spend planning the setup, observing, reading through translations and the time you spend with the moderator and translator as well as the time you will spend on analysis and reporting. Establish the effect that the currency exchange rate will have on your budget.

The success of your international research project depends on how well you plan. The more details you nail down during your planning phase, the fewer obstacles you will face during the next phase, project management.

Project management

Demographics. It goes without saying that you'll need to have a keen grasp of market demographics in the country with which you are working. For example, in Shenzhen, China, which has a rapidly growing population of nine million, 83 percent of the population is under 35! Such a youthful respondent pool may have more aggressive, quicker responses than people in other worldwide cities. Remember that demographic breaks may differ from those we are accustomed to in the States. Age cutoffs may have different intervals, for example. Keep in mind that pure numbers don't tell the whole story. Qualitative researchers know that the key to really understanding the recruitment pool is being able to discern the shades and distinctions behind the numbers.

Cultural nuances. Cultural differences between two countries can lead to misunderstandings, even when you speak the same language as the participants. For instance, while one of the authors was conducting a focus group in England about toys, she asked the group where they bought stuffed animals and received only horrified looks in response. She quickly added, "You don't think I mean taxidermy?," and they all nodded their heads yes. It turns out that in England stuffed animals are called "cuddly toys."

Find out as much as you can about the country's cultural norms, work habits and attitudes toward punctuality, products and even family dynamics. In some cultures, participants may bring their whole families to a group and expect reimbursement.

Understanding the pattern of group dynamics in a specific culture is essential for obtaining good research results. In Japan, for example, groups will work together to maintain harmony and agreement is important; it can be difficult to get individuals to criticize an idea or product.

Recruitment. There are a number of considerations involved in the recruitment stage. How many people can your facility handle? Determine exactly how participants will be recruited. Face-to-face? Via

telephone? Make sure attendance confirmation plans are in place and will be carried out and that honorarium and reimbursement issues have been determined. Familiarize yourself with the country's laws relating to research projects. In China, for example, respondents are not allowed to taste products or take new products home for trial without prior government approval.

It's now time to find your translator and your moderator, both of whom are critical to the success of your project. It's important that you know their backgrounds, can understand them well and develop a good rapport with them.

Choosing and working with translators and moderators

Translators and translations. Most of the ideas you communicate to your respondents and to your local clients will be filtered through a translator. Does the facility you are working with employ translators or will you need to make the arrangements? To ensure accuracy, you might not want to rely solely on the local facility and may consider using at least one other source. When necessary, change wording or descriptions to be more accurately understood in different languages and cultures.

Moderators. Local moderators can help you sift through cultural nuances, customs and attitudes, which will improve your relationship with the focus group and viewers. Moderators can help you manage dominant responders and non-responders. Schedule enough time to meet with the moderator and translator prior to the groups so that you can address these issues fully. After the group, meet with the moderator to obtain his or her perspective and to follow up with any questions you have about the discussion. You might even request that the moderator write a topline in addition to the verbal debriefing. A moderator's input can be invaluable to the final phase of your research project, interpreting results and findings.

Interpreting results and findings

Language meaning and interpretation. Qualitative research of any

kind is, by its very nature, highly dependent on language. In an international setting, sorting through idioms, metaphors and other linguistic subtleties adds layers of complexity to interpreting what people are trying to communicate. The key to clarity in any international setting is to face language problems directly. Work closely with interpreters and local bilingual people in the research field staff.

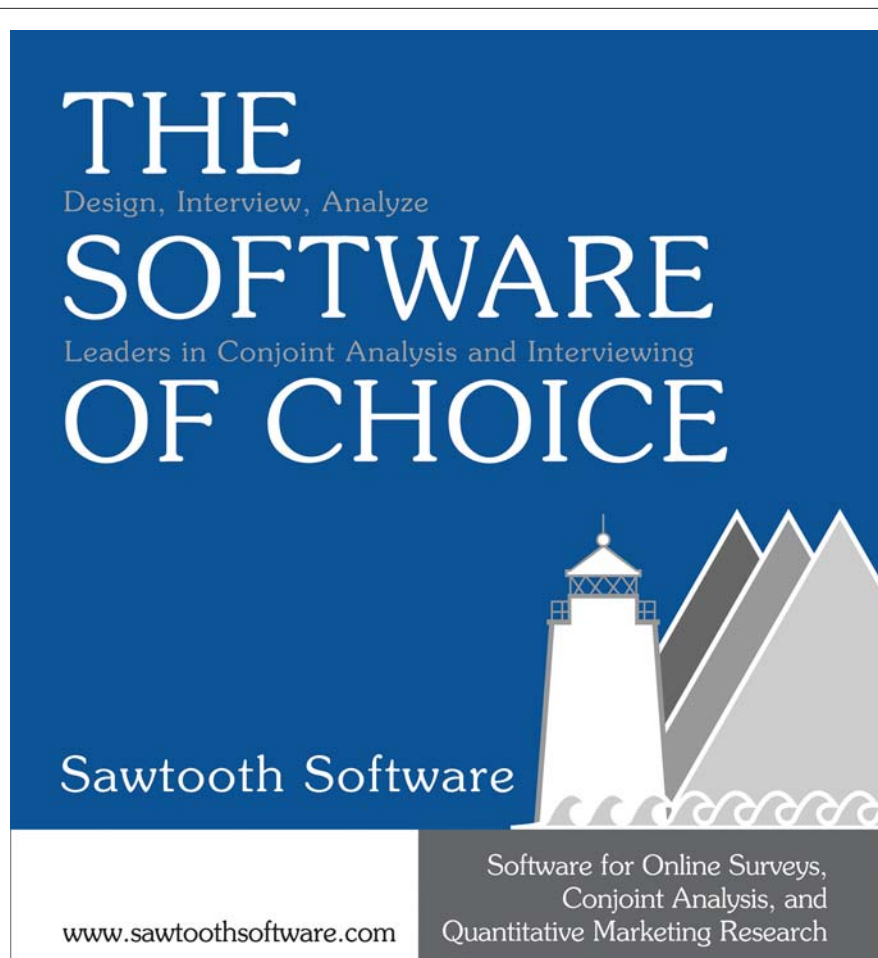
Empathy. All successful qualitative research relies heavily on the ability to think and feel from the perspective of the people being interviewed. To develop empathy, spend time discovering how consumers use a product category that you are testing. Visit aisles in stores where the product is sold and observe who is buying the product and find out how they use the product. Background material on a culture and country is helpful, but watch out for assumptions and antiquated notions that are no longer accurate.

Class and cultural cues. Understanding how class and status are perceived

within a society is paramount to a precise understanding of how your focus groups perceive the product you are testing. People are going to communicate their thoughts and feelings to you through a complex prism of these cultural concerns. Garner insights from local people you are working with about how to decipher class and cultural cues.

Clarity and understanding

Cooperating with the people you are working with abroad, and comparing notes and analysis with them, will bring clarity and understanding to what your group participants are trying to communicate to you and your client about the product you are testing. The myriad of details involved in an international research project may appear daunting at first. By dividing your project into these four main phases and following through on the attendant stages of each project, the work will be more manageable and you will achieve the highest-quality research standards and results possible. | Q

The advertisement features a dark blue background. At the top, the word "THE" is written in large, white, serif capital letters. Below it, the phrase "Design, Interview, Analyze" is written in a smaller, white, sans-serif font. The word "SOFTWARE" is written in very large, white, serif capital letters. Below that, the phrase "Leaders in Conjoint Analysis and Interviewing" is written in a smaller, white, sans-serif font. The words "OF CHOICE" are written in very large, white, serif capital letters. In the bottom right corner, there is a white silhouette of a lighthouse on a rocky island, with stylized waves below it. The text "Sawtooth Software" is written in white, sans-serif font across the bottom of the graphic. Below the graphic, there is a white box containing the website address "www.sawtoothsoftware.com" and a dark grey box containing the text "Software for Online Surveys, Conjoint Analysis, and Quantitative Marketing Research" in white, sans-serif font.

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Multiple zones, one approach

At the time of writing this article, the result of the 2008 U.S. Presidential election was still in the balance. By now readers of *Quirk's* will know whether John McCain or Barack Obama is moving into the White House, and will no doubt be speculating on what this change at the top will mean for them on a personal level as well as for the country and its place on the world stage.

One thing is certain: The new president will run things in his own style, stamping his personality on the new administration both through the policies he introduces and the team he creates around him.

With the president as CEO and his cabinet acting as heads of departments leading different teams of vice presidents and line staff, the new administration will be organized very much like a business. And like all businesses, a change of leadership can have a significant effect on its culture, the way it does business and its effectiveness.

In this respect, both government and businesses – especially those operating in the service sector – are people-focused organizations. Even though success is ultimately measured by the bottom line, we all enjoy doing business with people we get along with.

The problem with a “people business” is that our relationship with client-servicing staff may not communicate the true strengths and weaknesses of an organization.

Current strengths

The relationship between a market research agency and a client may well begin with a credentials presentation at which the agency outlines its previous international project experience and current strengths of both individual team members and the business as a whole. In the absence of prior knowledge, the decision to award a contract is based on perception rather than experiential reality.

A second job is won on the strength of the first. The success of this first project determines whether the client awards further work to the agency. But what happens if the research team changes before the agency is commissioned again by the same client – will the next project be equally well-managed? This issue is more acute with international research projects involving larger teams spread across different parts of the world, many of whom will never actually meet the client.



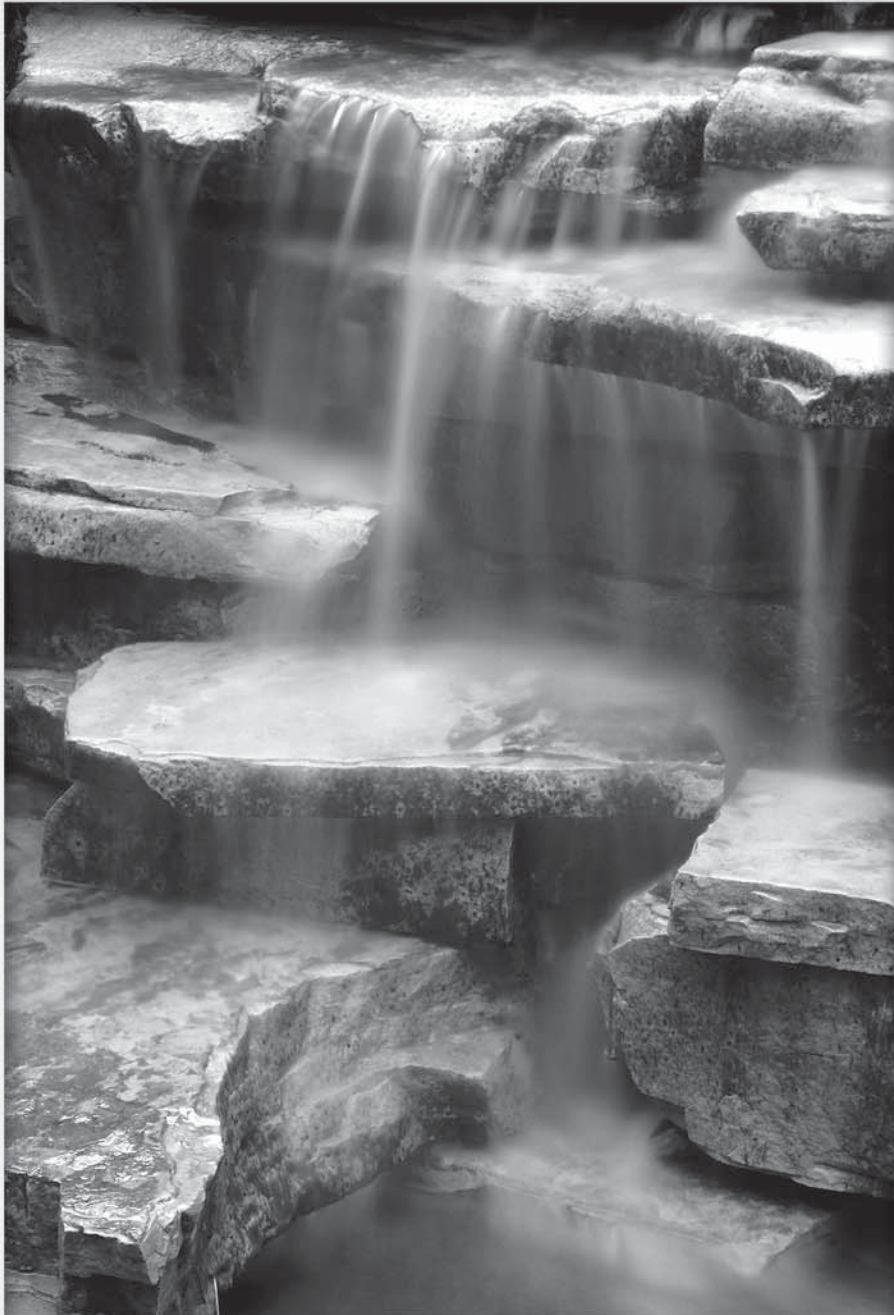
By Owen Jenkins

Managing the
impact of personnel
on international
research projects

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The Fine Art of Marketing Research

Behind the curtain

So how do you ensure consistency in international research when teams change? First of all, research buyers should look “behind the curtain.” If most day-to-day contact is just with a single person then a personnel change can seriously affect the client-research agency relationship. Clients stand to benefit from getting to know the wider agency team with whom they are dealing and ensuring it is sufficiently empowered to handle issues and respond to queries effectively.

Clearly this also works in the agency’s favor as it is in their best interests to ensure that the whole research team enjoys a high visibility with the client and that no one person is seen as the sole project deliverer.

Looking closer still, at a credentials presentation or agency briefing, it is well worth establishing if the present team members will be the ones managing the research project itself, and which individuals will be responsible for the ultimate success of the project. It may be that reports are received from a U.S.-based agency but the fieldwork and interpretation is being led by a completely separate team in Asia or Latin America. Clearly, local expertise is essential for the success of international research, but it is equally important that this level of understanding extends to the people who report back and deliver findings to the client.

At our firm for example, most major international projects we conduct from Boston also involve our offices in London and Singapore. While a kickoff meeting to discuss budgets and schedules is often made up solely of U.S.-based research staff and the client team, it has then proved beneficial to involve the other global teams in subsequent client meetings to discuss objectives in greater detail and meet one another. These teams can also share their unique knowledge of the markets being researched, and at a very early stage highlight any barriers that may be faced, for example reaching a representative audience. From a client perspective, it is important

Ways to ensure consistency in international research projects:

- Assess whether you are too reliant on a small number of research agency personnel; if your key contact left tomorrow, how would you cope?
- Look behind the curtain. Get to know the extended agency team and interact with them; understand their strengths and weaknesses and the limits of their responsibilities.
- Set up briefings with other global offices involved in running the project at an early stage and check their lines of communication.
- Establish who is conducting the core project work and check the ability of different national teams to work together holistically. For example, does a U.S. head office have the necessary skills to interpret data from rural China or is this conducted locally?
- Ask to see sample documents/forms and establish what other systems are in place to ensure consistency in data capture, interpretation and reporting. Does the agency adhere to any quality standard such as ISO?
- Consider how you manage your agency short-list. Find a balance between choice and consistency when allocating research projects. Repeat business helps create a greater mutual understanding.

that they realize such conversations have taken place and that they are benefiting from staff knowledge.

Systems to cope

Once the people involved in the project are known, research buyers need to be confident that the same people have the systems to cope.

Managing international research can be a complex process involving dozens, if not hundreds, of individuals operating across different languages and cultures.

Just as creative staff are seen as central to the advertising industry, so research design and interpretation specialists are valued within market research. Rightly so, but this should not lead to a lack of focus on logistics and other back-office functions that aid the delivery of effective, high-level insight.

Channels of communication must be clear and knowledge pooled to ensure that valuable insights do not get lost in translation. Regional offices of global research agencies must have the skills to work in tandem, understanding local variations in methodologies so that, for example, a U.S. head office is equipped to interpret data from rural China if necessary.

Some agencies will adhere to a globally-recognized quality system such as ISO but either way there should be effective procedures in place to ensure consistency in data capture, interpretation and reporting. For a brand owner to check this at the outset, it can be useful to ask for copies of sample documents like interviewer briefing forms and questionnaires so it can understand the agency’s way of working and ensure project implementation is in line with research objectives.

Better understanding

One final point to note is that consistency will often increase in line with the volume of work an agency conducts for a given client. The research team will naturally develop a better understanding of the client’s marketing and overall business objectives with every project completed, in addition to its culture and way of working, which can help minimize the impact of any change in senior personnel.

However, such a relationship is not always compatible with roster systems whereby clients maintain a short-list of agencies among which projects are divided. While this is often done on the basis of each agency’s relative strengths and, for

international projects, experience and presence in a particular country or region, it can hinder a deep understanding of your research partner and put you at risk from a change in leadership.

Every time

Above all, consistently good research comes from doing the right things well every time. As agencies, we strive for this but perhaps we learn most from when things don't go according to plan. I'm reminded of a previous client in the hotel trade who said - somewhat surprisingly - that the best thing to do with a new customer was spill food over them. This happened in one of his hotels and the manner in which his team rectified the situation - having the customer's suit cleaned and hanging on the door in time for his business meeting - ensured that he remained a loyal customer despite the accident.

Whenever there is a change at the top of a research agency, things will inevitably change further down the line. However, there are a

number of steps that client-company researchers can take to ensure consistency in the conduct of international research projects, such as getting to know the extended agency team and the systems on which they rely. This also works in

favor of the agency itself as it can illustrate the resources and depth of understanding it holds. In doing so, research clients will no longer be at the mercy of personnel changes in what remains a fundamentally people-focused industry. | Q

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The survey killer

Online research has opened up a whole new world in the past few years but is it really living up to its promise? Are research professionals using online survey techniques as effectively as they could? Whose responsibility is it to ensure an excellent respondent experience, one that fosters long-term engagement, thoughtful responses and reliable research data?

Our respective firms recently set out on a quest to get clarity on these questions on behalf of all researchers worldwide. This article, the first in a series, goes to the roots of the issues and highlights the inherent consequences resulting from respondents losing interest during online surveys. Next month's follow-up article will reveal how advances in technology offering novel question and response mechanics can help market researchers overcome this recurring challenge while making online surveys more interesting and easier for respondents to take.

Quite different

Depending on one's role and position in the market research continuum, the issues, and therefore the solutions associated with them, look quite different:

Researchers depend on survey respondents being willing and able to answer questions, and on being able to interpret those answers in a meaningful way for their clients.

Clients can now afford to target large and niche samples around the world with online research, get answers to time-sensitive questions very quickly, and stretch their research budgets that much further. These benefits become less compelling if we start to question the quality of the research data, or create a situation whereby the cost of maintaining a panel increases.

Panel providers put a lot of effort and expense into recruiting panelists and turning them into a valuable business asset. A panelist

who is bored during a survey will be less likely to take another one in the future, so happy respondents mean a more cost-effective business, and more creative survey design means winning more business.

Respondents want to participate in surveys that are interesting and engaging. While they appreciate the rewards they receive for completing surveys, they actually like giving their opinions – but want to be able to do this effectively.

A look at the impact of boredom on the respondent experience



By Deborah Sleep
and Jon Puleston

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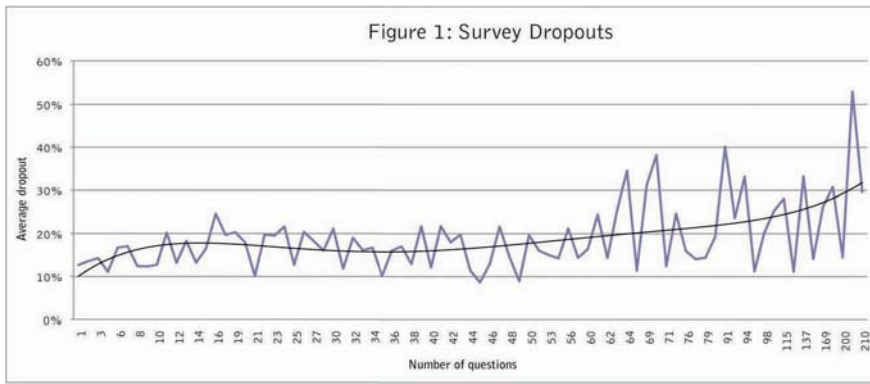
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Emotional connection

The fundamental difference between conducting online and offline research is the presence of a human interviewer. Human interaction is more able to establish an emotional connection with respondents. Getting them in the mood to answer questions in the right frame of mind is much harder with online surveys. With no interviewer in sight, the online respondent is more likely to drop out of a survey sooner. And without being proactively probed by an interviewer, they can progress through a survey with a minimum of thought and response. When participating in surveys online, it is easier for respondents to: say “I don’t know”; give minimal consideration to their answers; not pay attention when reading a question; skip past instructions; not read blocks of text.

Research reveals that most respondents complain that completing some online surveys is like wading through mud. They get very frustrated waiting for questions to load and constantly having to click the [next] button. If each question takes three seconds to load, on average, in a typical 60-question survey, respondents end up spending three minutes waiting for questions to load. This, combined with accidentally missing answers and getting error messages, all leads to added and unnecessary frustration. In general, respondents also dislike drop-down menu options and questions that are complicated to answer.

Need a makeover

Online surveys need a makeover. Many of them still look like static online forms, putting too much focus on the questions themselves and not enough on the techniques used to deliver and communicate them to the respondents. The lack of survey fluid-

ity then automatically feeds into a lack of fun and engagement.

The market research language of surveys is also a factor in boring respondents. Reading statements such as, “Please indicate how much you agree or disagree with the statements below on a scale of 1 to 10, where 1 means you completely disagree and 10 means you completely agree, and 5 means you neither agree nor disagree” takes six seconds from start to finish. But if the question is laid out properly, this verbiage is totally unnecessary and could simply be reduced to “Please rate the following statements.”

Respondents appreciate the opportunity to provide their opinions when asked to evaluate new and different ideas, a much bigger – and sometimes still underestimated – driver than the rewards they receive for doing it. But the real question is: are we as research professionals encouraging and enabling respondents to do this as best we can to get the best results possible? To answer this question, we first need to examine what causes respondent boredom.

Memories dry up

When boredom sets in, online respondents usually still complete the survey, but they stop giving such considered answers. Their memories dry up and, if they don’t enjoy the experience, they are far less likely to participate in subsequent surveys sent to them in the future. So how many really do drop out? And if they don’t go so far as to drop out, how else does their response behavior change? Our research revealed some interesting findings around these questions.

Survey dropout rates

We examined the dropout rates from over 550 interactive surveys conducted on the GMI interactive Flash survey

platform, and correlated this with the survey length and question formats used in these surveys. All the surveys included a progress bar showing how much of the survey was completed.

The average completion rate for surveys under 60 questions (typically 20 minutes) was 82 percent. So while it is reassuring to know that the vast majority of respondents do complete the interactive surveys they start, we wanted to understand when dropouts occurred and what was driving them.

- The first area where dropouts tend to occur: within the first 15 questions. Once past this threshold, a respondent is more likely to complete the survey, regardless of length.
- For surveys containing between 10 and 60 questions, there is no apparent relationship between survey length and dropout rate (incentives typically increase with the questionnaire length).
- In surveys longer than 60 questions, dropout levels appear to increase and are certainly less consistent, as shown in Figure 1.
- The possible correlation between survey completion times and dropout rate showed no apparent relationship (this may be due to the varying nature of the questions).
- Survey respondents report that relevance of subject matter and interest in the questions are the main factors influencing whether they complete a survey.

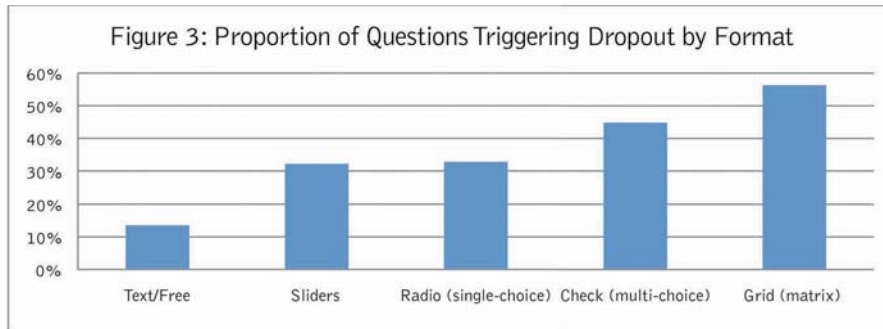
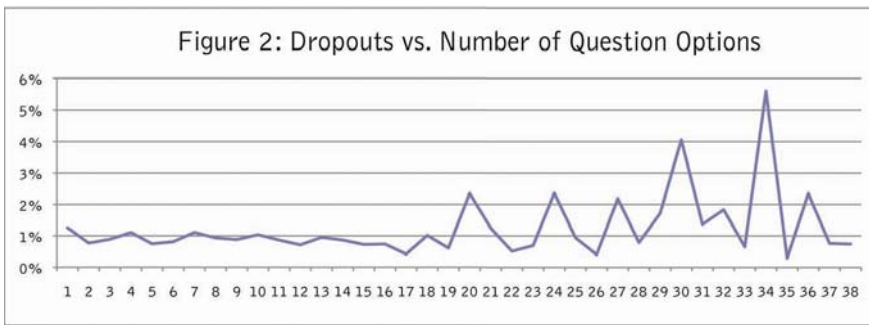
The number of options

The key factor triggering dropout appears to be the number of options presented in a question. Figure 2 shows that dropout significantly increases when questions show more than 20 options on a page.

Question types

The question format also has an influence on respondent boredom. Grid formats and matrix questions appear particularly prone to dropout (Figure 3):

- Nearly 60 percent of grid questions triggered some level of dropout, compared to 30 percent for standard single-choice questions;
- Check-box (multi-choice) questions were the second most likely to cause dropout.



Question repetition

More worryingly for panel providers, a dozen surveys containing repetitive question sets of three or more similar questions showed that these can trigger dropouts of up to 5 percent of respondents, depending on where they are placed in a survey. Repetition is a killer, particularly on matrix questions,

which are the most popular question format of most surveys.

Speeding effects

A simple survey with a range of different questions was used to test the increase in answering speed caused by the onset of boredom. The positions of these questions were swapped for

different cells of respondents, some seeing a given question at the beginning and some at the end. The time each respondent spent to answer each one was recorded. The test survey was approximately 16 minutes long, sampling 789 respondents split over seven cells, with a minimum of 100 respondents per question per position.

- For the same question, the average time spent answering decreased by 17 percent when it was at the end of the survey, compared to when it was at the start.
- Time spent answering the first question in a repetitive set, compared to follow-on questions, showed notable speeding up through a set, with an average decrease of 22 percent in time spent answering a follow-on question.
- Particularly prone to speeding effects near the end of a survey are instructions and open-ended questions. Reading times for instructions dropped by an average of 22 percent (halving in some cases), and respondents spent 25 percent less time answering open-ends.

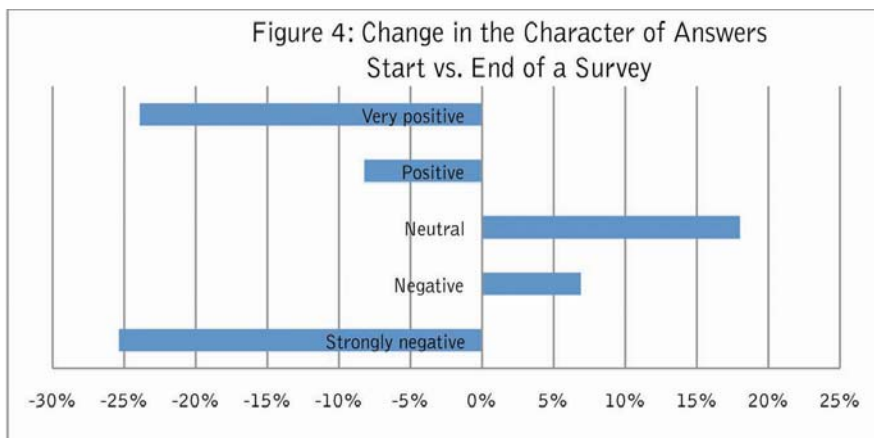
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Changing characteristics of response data

The time respondents took to answer questions was shown to affect the character of their responses. The five key things observed were:

- fewer check marks in multiple-response questions;
- a shift toward the neutral and slightly negative when answering range questions;
- generally a reduction in extreme responses;
- more pattern-answering within long question sets;

- shorter text responses in open-ended questions.

The test revealed an average 10 percent drop in the number of check-box selections in multi-response questions (Figure 4). When answering typical five-point-range questions, neutral/don't know responses rose by 18 percent and we observed a 7 percent shift from slightly positive to slightly negative. Very positive and very negative responses both fell significantly by an average of 25 percent, but the differences tend to cancel each other out.

Incidences of pattern-answering were also examined. We examined cases where respondents answered more than five questions in a row in the same way and measured an average 38 percent increase in pattern-answering activity when the same questions were asked at the start vs. the end of a survey. Open-ends appear to be the most sensitive question format to boredom factors. The two-order test showed an average 41 percent decline in the word count with the same question being asked at the start vs. the end of the test survey.

Clear opportunities

It is important to remember that most respondents did complete the surveys they started and that the behavioral patterns we have been examining are marginal ones that occur among the least-engaged respondents. However, we can see that there are clear opportunities to improve on the way we build online research in order to better engage with all respondents.

The exciting challenge we have in front of us is to completely rethink conventional question approaches. For more important online surveys, there is a much greater level of investment needed in design and development, and a paradigm shift of thinking is required in the profession. We must recognize the importance of design and communication in the online survey process, changing our mindset around how we communicate with respondents by not just focusing on the information we want to find out but also on the need to engage respondents in the experience, starting with the language that is used in surveys.

Online respondent engagement is not out of reach - we just need to be more creative about it. In next month's issue, we will focus on the solutions available to generate greater respondent engagement and show how interactivity can be an easily-implemented cure for the common online survey. We will reveal the findings of the next phase of this research project, which compare the results gathered from regular online surveys with the ones from surveys using interactive Flash elements. | Q

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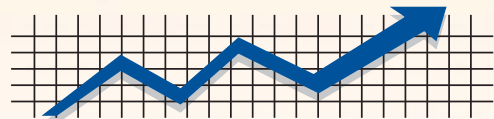
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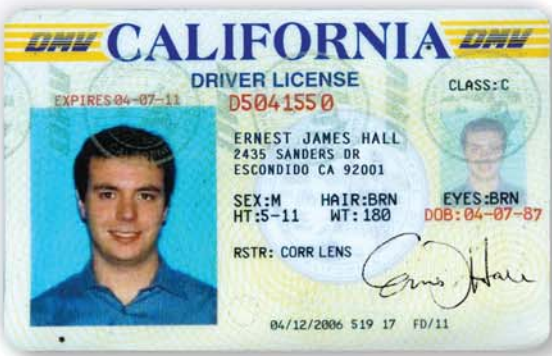
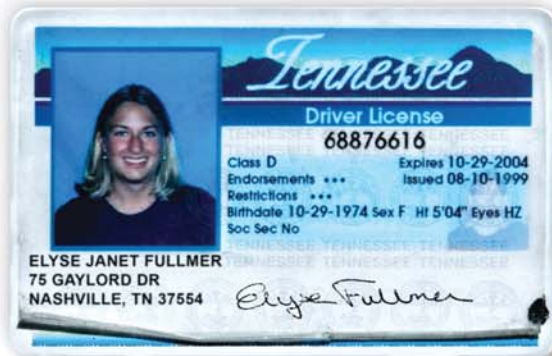
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Aiming for the best response possible

Respondent quality has been a key concern in the marketing research industry over the last several years. Thinking more broadly about quality and designing high-quality research is key to overall quality improvement. It is important for researchers to follow best practices for conducting online research in order to consistently deliver meaningful, actionable information to clients. Research-on-research needs to be conducted in order to deliver sound best-practice recommendations for the industry. TNS has recently examined four specific questions that address the fundamental issue of research quality.

Question #1: Should only generic survey invitations be sent to respondents?

The survey invitation is important since it is the first contact with a prospective respondent. It can cause respondents to decide not to respond as well as impact how they respond.

TNS tested five concepts using two different survey invitations. The generic invitation simply stated that a new survey was available, without telling the respondent what the subject was, while the non-generic invitations provided the subject.

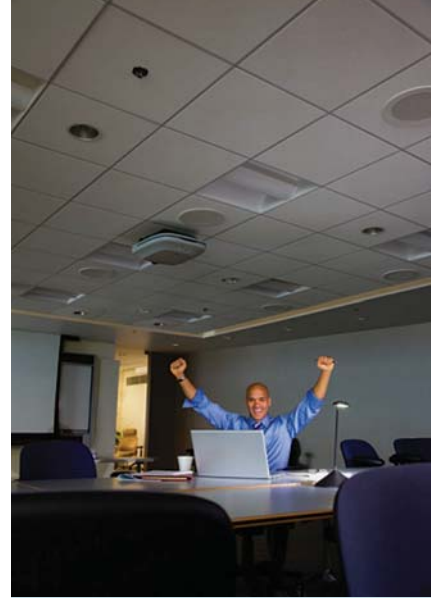
Sending invitations that identify the subject does not increase response rates as some have speculated (Table 1). In addition, key measures results for the groups receiving the generic and non-generic invitations are not significantly different, suggesting the type of invitation does not have the potential to change business decisions (Table 1).

The invitations that identify the subject do have the potential to impact category and brand usage questions. This includes higher frequency of category usage, higher brand usage for several brands and a slightly higher number of brands used for the non-generic groups. TNS speculates that telling respondents the subject of the survey causes them to answer differently in order to qualify

for the survey or the possible placement of a product.

By sending generic survey invitations, the possibility of self-selection bias is reduced, which may be higher for certain categories. In addition, not providing a subject reduces the likelihood of respondents intentionally misrepresenting themselves or providing inaccurate information to qualify for surveys.

A look at four important methodological questions for online research



By Susan Frede

Editor's note: Susan Frede is vice president, research and panel management at the Cincinnati office of research firm TNS. She can be reached at 513-621-7887 or at susan.frede@tns-global.com.



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Table 1: Type of Invitation

	Generic Invitation	Non-Generic Invitation
Response Rates		
Concept 1	48.6%	49.0%
Concept 2	48.7%	50.6%
Concept 3	46.4%	48.0%
Concept 4	43.1%	45.1%
Concept 5	44.8%	44.7%
Definitely/Probably Would Buy		
Concept 1	57%	54%
Concept 2	39%	42%
Concept 3	36%	40%
Concept 4	31%	34%
Concept 5	35%	35%
Average Value (five-point scale)		
Concept 1	3.68	3.75
Concept 2	3.20	3.11
Concept 3	3.27	3.34
Concept 4	3.43	3.56
Concept 5	2.97	2.84
Average Uniqueness (five-point scale)		
Concept 1	3.30	3.34
Concept 2	3.47	3.51
Concept 3	3.60	3.65
Concept 4	2.74	2.82
Concept 5	3.75	3.74

Question #2: Do survey reminders help or hurt response rates?

With Internet surveys, reminders are often sent to respondents because there is little or no cost implication. However, data quality and respondent retention may be compromised when consumers are bombarded with communication for the same survey.

TNS tested five concepts using survey reminders and then tested the same five concepts without using survey reminders. For the groups receiving a reminder, only respondents who had not completed the survey at the time of the reminder received the actual reminder.

Response rates are not consistently impacted by reminders (Table 2). For three of the five concepts, response rates are slightly higher when respondents are sent a reminder, while the other two rates are slightly lower. Only Concept 2 receives a significant increase in response rate, so reminders do not generally have the impact some expect. In addition, key measure results for the two groups are not significantly different, suggesting sending or not sending reminders does not have the potential to change business decisions (Table 2). Also, sending reminders does not change the representivity of the samples on demographics or category/brand usage.

Table 2: Survey Reminders

	No Reminder	Reminder
Response Rates		
Concept 1	50.0%	48.4%
Concept 2	45.9%	50.8%
Concept 3	46.9%	50.2%
Concept 4	43.7%	45.8%
Concept 5	46.5%	43.7%
Definitely/Probably Would Buy		
Concept 1	54%	56%
Concept 2	38%	37%
Concept 3	41%	41%
Concept 4	36%	32%
Concept 5	33%	34%
Average Value (five-point scale)		
Concept 1	3.68	3.69
Concept 2	3.10	3.15
Concept 3	3.44	3.33
Concept 4	3.53	3.51
Concept 5	2.91	3.00
Average Uniqueness (five-point scale)		
Concept 1	3.30	3.34
Concept 2	3.47	3.44
Concept 3	3.69	3.70
Concept 4	2.88	2.78
Concept 5	3.71	3.79

Therefore, it is not recommended that respondents be sent reminders about surveys they have not completed. With a managed access panel, reminders do not increase response rates or impact sample representivity.

Question #3: Does excluding partial completes impact data reliability?

One priority for every survey is to maximize the number of respondents fully completing surveys, which is best accomplished through highly-engaging questionnaires. However, it is also possible to set a partial completion point for different survey types and include all respondents who answered questions through that point.

TNS analyzed data from six monadic concept tests to understand the impact of incomplete surveys. The partial completion point for these tests is the purchase intent question.

Sample size does not dramatically increase when setting a partial completion point rather than requiring full completion (Table 3). Generally, 40 or fewer respondents are added to each concept leg when the partial completion point is set at purchase intent. This represents less than a 10 percent increase in sample size. The variation in the number of partial completes in each concept test is likely driven by the subject of the survey, as well as ques-

tionnaire differences (e.g., number of questions prior to purchase intent, total length of the survey, etc.).

The respondents who drop out are somewhat different demographically from those who complete the entire survey. Those dropping out are more likely to be older, retired and male. There are also some brand usage and habit differences between those dropping out and those completing the entire survey. Any demographic, brand usage and habit differences can lead to less-representative samples, so it is important to keep dropouts to a minimum.

Systematically excluding certain kinds of respondents can introduce bias, so it is important to determine whether there are differences in purchase intent when partial completes are excluded. Although purchase intent ratings tend to be slightly lower for those dropping out versus those completing the entire survey, there are simply too few respondents making it to the partial completion point (purchase intent) to change the overall results enough to matter (Table 3). Concept Test 6 is the only one to see scores shift by two percentage points or more. This is likely due to the slightly greater number of partial completes in this particular study and suggests that, with a greater proportion of partial completes, overall purchase intent could be impacted.

By including partial completes in the data, the risk of dropouts influencing the results is negated. Purchase intent scores for the partial completes tend to be lower than scores for those completing the entire survey, so dropouts have the potential to impact data when they are a large proportion of a sample. TNS recommends clients periodically examine the data from respondents dropping out to determine whether or not the overall findings are impacted. Certain topics or types of surveys may be more prone to dropouts, so understanding the potential impact allows informed decisions to be made on how to handle partial completes.

Question #4: Does it matter what day of the week field starts and how long field is open?

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Senior Analyst, Premium Services
Yahoo!@ Incorporated

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Table 3: Partial Completes

	Number of Full/Partial Completes	Definitely/Probably Would Buy	
		Excluding Partial Completes	Including Partial Completes
Concept Test 1			
Concept 1	318/20	52%	51%
Concept 2	318/25	54%	55%
Concept 3	307/31	56%	56%
Concept 4	325/29	55%	55%
Concept 5	320/29	58%	57%
Concept 6	318/27	59%	59%
Concept Test 2			
Concept 1	392/22	39%	38%
Concept 2	381/34	39%	38%
Concept 3	375/58	41%	40%
Concept Test 3			
Concept 1	421/37	34%	34%
Concept 2	430/39	37%	36%
Concept 3	429/34	33%	32%
Concept 4	438/33	33%	33%
Concept 5	452/38	37%	37%
Concept 6	413/29	32%	31%
Concept Test 4			
Concept 1	315/4	35%	35%
Concept 2	301/6	28%	27%
Concept 3	321/3	33%	32%
Concept Test 5			
Concept 1	195/4	32%	32%
Concept Test 6			
Concept 1	308/74	40%	41%
Concept 2	294/75	50%	48%
Concept 3	290/70	44%	44%
Concept 4	311/67	54%	53%
Concept 5	300/68	47%	48%

ing research data is speed – data can be collected very quickly. However, there is concern that speed may negatively affect the quality of the data. Data and business decisions may be impacted depending on the day of week the field starts or by how long the field is open.

TNS fielded a 25-cell test to address questions around the appropriate field period for online studies. The research-on-research study involved five concepts. Each concept had five separate samples, one launched each day of the week (Monday through Friday). Respondents had seven days from the day the sample was launched to respond.

Day one and day two of the field have the largest proportion of completes (Figure 1). There are very few completes on days five through seven.

Earlier responders (days one to three of field) tend to be slightly different demographically. Earlier responders tend to be older and part of smaller households with no children and lower-income. They are also more likely to be white and retired. Later responders (days four to seven) tend to be those who may have busier lives (i.e., employed full time, children/families). These demographic differences suggest that field should

Table 4: Purchase Intent & Key Measures for Cumulative Day of Field Completed Survey

	Day of Field Completed Survey			
	Days 1-4	Days 1-5	Days 1-6	Days 1-7
	a	b	c	d
BASE - Total Respondents	8,132	8,644	9,004	9,338
Definitely/Probably Would Buy %	39%	39%	39%	39%
Key Measures – Averages				
Liking (six-point scale)	3.55	3.54	3.54	3.54
Value (five-point scale)	3.32	3.32	3.31	3.31
Uniqueness (five-point scale)	3.41	3.41	3.41	3.40
Believability (five-point scale)	3.91	3.91	3.91	3.91

remain open at least four days in order to get a representative sample.

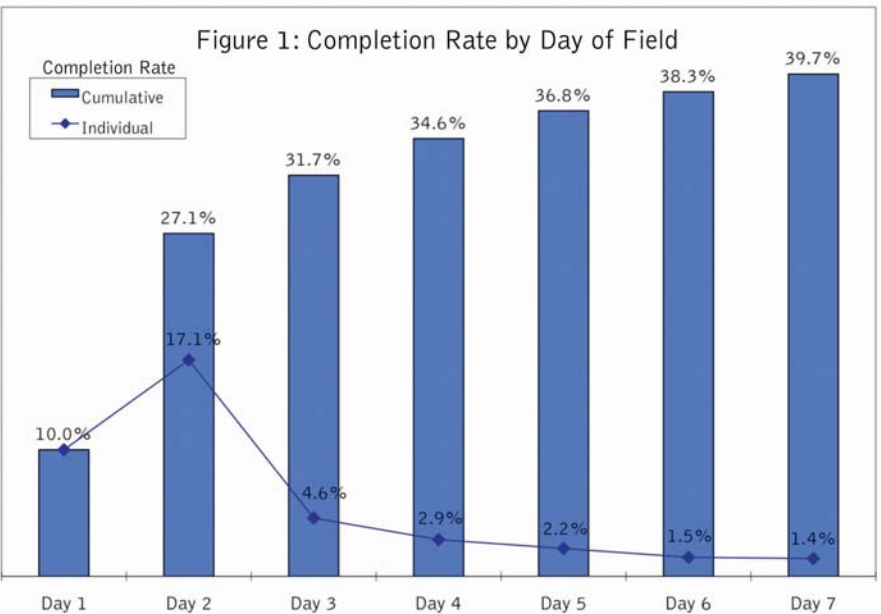
Purchase intent and key measures are consistent with the seven-day field period data when looking at different cumulative totals. Table 4 shows combined data for the five concepts, but even for individual concepts differences are not observed. There are also no meaningful differences on demographics and habits across these four groups. This data, coupled with completion rates, suggests a four-day field period is sufficient to get stable results.

There are very few significant differences between weekday and weekend responders on key measures, demographics and habits. There are also no meaningful demographic and habit differences based on the day of the week the field launched. Key measure scores do tend to be slightly lower for Thursday launches and slightly higher for Friday launches but the differences are generally small and the same pattern is not observed for all five individual concepts. All of this suggests that field can be started any day of the week.

Based on this research-on-research, a four-day field period will yield stable results. This leads to more representative samples and ultimately more accurate data and business decisions. The day field launches does not appear to impact data, so there is no need to launch on a consistent day of the week. There is also no need to include both weekends and weekdays in the field period since there are no differences between the two.

Research rigor

It is important as an industry that research design decisions are backed up by research rigor. The introduction of new technologies presents an ever-changing dynamic to the ways that surveys are conducted. To that end, there will always be a need to create better, faster and more efficient methods of gathering and analyzing data. Following best practices and continuing to strive for perfection in survey and study design results in better quality that will allow researchers to have confidence in their business decisions. | Q



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Let's meet the respondents more than halfway

As research client concern has grown over the quality and consistency of data drawn from surveys conducted via online panels, the industry has worked together to find ways to improve data quality - from developing an ISO standard for online panels to creating software solutions to identify and screen out individual respondents on the basis of past behavior. These efforts are typically framed around the spectre of the professional respondent: the too few who take too many surveys, do so inattentively or misleadingly, perhaps because their motivations are primarily or solely pecuniary. The solutions proposed are therefore generally focused on how to spot these behaviors, including deliberate traps set to do so, in order to eliminate the data from these respondents or even preclude the respondent from future participation.

These are vital steps to take in the short term to improve the quality of the data our clients receive. However these techniques are about treating the symptoms and do not examine what it is about the nature of online research that has led to the rise in these behaviors among those who participate. In the process, the industry has tended to demonize those upon whom we rely - the willing research participants - while failing to recognize the responsibility that we, as researchers and panel owners, hold in creating the conditions in which promote problem behaviors. Furthermore, these approaches ignore the changing Internet landscape in which online panels exist. This article seeks to

redress some of that balance as well as to try to point the way toward some options we may have to genuinely improve research online - both now, and for the future.

Range of motivations

It is well known that there are a range of motivations that we try to appeal to when persuading people to take part in research, whether ad hoc or

on an ongoing basis as a panel member. Broadly speaking, these form a continuum between reasons intrinsic to the research itself, such as simple curiosity, pleasure in expressing one's opinion, contributing to a product's design, influencing a decision, seeing one's views reported in the press etc.; through to motivations extrinsic to the research, such as receiving a reward, financial payoff or even some form of advantage over non-participants (e.g., access to final survey results, the ability to use the survey process to communicate opinions and product/service needs to companies and organizations). We try to create a balance so that our panels attract, and our studies include, different people that may be

Creating the conditions for data quality



By Laura Davies

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motivated in these different ways. What this amounts to is a package or offering that we promise to participants in exchange for their time, energy and ideas.

As in any ongoing relationship, both parties have a set of expectations regarding their end of the bargain: if either party defaults on the bargain, then the other may be inclined also to do so, in a game of tit for tat. Every experience a member has with a panel influences their likeli-

hood to continue participating as well as the manner in which they do so. Panelists who are not satisfied with their overall experience of belonging to the panel are more inclined to exhibit the kinds of survey satisficing behavior (originally described by Jon Krosnick) that lead to issues in data quality. They are also more inclined to cease participating altogether.

Most genuine research panel owners do their best to deliver what they offer. Much time is spent on providing interactive content to appeal to those who wish to connect beyond the commissioned surveys. Feedback on the use and application of research is distributed via newsletters and rewards promised are fulfilled upon (even if they take time to accumulate). Generally speaking, panel owners try to address panel members with a friendly and appreciative tone. However, these elements are only a part of the package that makes up the member's experience and are not in themselves sufficient to maintaining overall satisfaction.

Core activity

In terms of the relationship between the panel and the member, by far the largest portion of interaction is through the studies and research activities we invite members to complete. Therefore, irrespective of what is done to create a positive membership experience in the periphery, it is this core activity which defines the nature of the relationship and members' perceptions of the offering. This presents a particular challenge to access panels for whom exerting control over research mix, quality and content is more difficult.

At our firm, a panelist satisfaction study was devised and fielded on the Angus Reid Forum, our large Canada-wide panel, to better understand the factors that contribute to a satisfying experience as a member. Almost 18,000 members rated their satisfaction with a number of aspects of their membership and participation in the Angus Reid Forum as well as their overall satisfaction and likelihood to recommend panel membership to someone else. Shapley regression analysis was used to determine which factors were the

key drivers of overall satisfaction, i.e., which aspects were those which, if improved upon, would have the biggest impact in the overall satisfaction of panel members, and vice versa.

Nine factors were measured for satisfaction:


1. Survey topics
2. Frequency of surveys
3. Quality of surveys
4. Length of surveys
5. Amount of time given to respond
6. Incentives offered
7. Newsletters/communications received
8. Look and feel of surveys
9. (Whether they felt satisfied that)
The input provided is valued

Of these, the two with the most impact on overall levels of satisfaction were "quality of the surveys" and "survey topics," respectively. This highlights the centrality of the research itself to defining the panel member's experience. In addition, the relatively lower impact that incentives had on overall satisfaction, as well as newsletters and communications, indicates that these would not adequately compensate if study quality or study topics were rated poorly. (Happily for us, they were not!)

Needs and objectives

When we help a client develop their own custom panel, one of the essential components to the panel-planning process is to understand how the client's research needs and objectives map out into a research program for the panel's annual life cycle. This program takes into consideration both the pieces of research required to gather the data needed by the client for decision-making as well activities required for panel engagement. In planning out the full panel program in this way, research activities are not looked at as isolated studies but rather how they contribute to the overall experience of belonging to the panel.

Although more complex, we took a similar approach in running restricted-access market panels. These wide-market panels support our research division across multiple verticals but are not sold out directly as sample. Care is taken to consider the



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overall research mix that is presented to panel members: consumer research is interspersed with opportunities for members to respond to current topical issues, and a range of lighthearted questions are developed to sprinkle into the longer, more factual studies. If the survey topics are one of the most important factors in driving panelist satisfaction, then some measure of control and planning is essential to ensure that members' expectations are understood and met.

Typical frustrations

Most panel owners will be familiar with the typical frustrations that panel members report with surveys. These include disqualifications, questions that don't allow the respondent to express their view, repetitive or tedious questioning, asking too much of cognitive ability or feats of memory, poor translations, unclear, stilted language and overly lengthy studies.

Of these issues, some are more clearly matters of poor research practice; others seem more endemic to the research process. One of the prime examples of the latter is where we terminate an interview because the invited panel member does not meet selection needs or where quotas for those with matching characteristics have been filled. While our broader message to members and potential members typically communicates the importance of their views as individuals, our screen-outs typically send out quite the opposite message: "Actually as it turns out your views aren't that important to us and after all. You people who are male and over 50 are all the same anyway."

Faced with this slightly insulting message over and over, while at the same time being told that their individual views should count, it is not especially surprising that members soon become inclined to find ways to avoid disqualification. This is compounded by the lure of a reward which they are also being denied by disqualification, despite showing their willingness to take part. Recognizing the questions that will determine eligibility and selecting the required answers is of course cheating – but is a fairly understandable reaction to the mixed messages

and disappointment of exclusion.

It is a combination of market pressure and research requirements that lead to the need to quota or disqualify, and it is not easily eliminated – though it is eminently reducible. It is also a problem which can be addressed by panel owners themselves to some degree. Better profiling and advance screening mechanisms allow for more and more profile variables to be known in advance. At our firm, the wide-market panels operate monthly panel-wide screening surveys which provide opportunity for more tactical, project-specific pre-screening. On some panels, such as those operated by Opinium in the U.K., members are rewarded for their participation regardless of whether or not they qualify. Other panels seamlessly provide an alternative set of questions to the respondent.

In the hands of researchers

Many of the other aspects that constitute the overall quality of a survey from a panelist's perspective lie far more in the hands of researchers than panel owners. For example, numerous experiments have shown that beyond a particular length of survey, data quality will diminish as the respondent's attention (and no doubt also enjoyment) decreases. Putting to one side the quality of data within the particular study, if repeat experience educates the panel members to expect long studies, they will be less inclined to relish the prospect of the next study. They may well choose not to take it, or act in a satisfying manner from the start, providing suboptimal responses in order to proceed through the survey faster.

Regardless, many online panels, faced with a client request for a 30-minute study to test 20 slightly varied iterations of a product package using rating scale grids of 30 items each, will still be willing to field the study in the knowledge that if they don't, one of the other players in the market will. Damage to their own asset is not well accounted for because it is not based on any one study but on the accumulation of negative experiences, which poisons the reciprocal deal between panel owner and panel member. The clients themselves do not consider these longer-term effects

because their relationship with the particular respondents is one-off. But it is the client who may ultimately suffer the consequences. If willing research participants are increasingly subjected to the kinds of studies that encourage reciprocal satisficing and inattentive behaviors, there will be an overall increase in studies which contain bad data – because the pool of willing participants is in fact, quite limited.

Collective effort

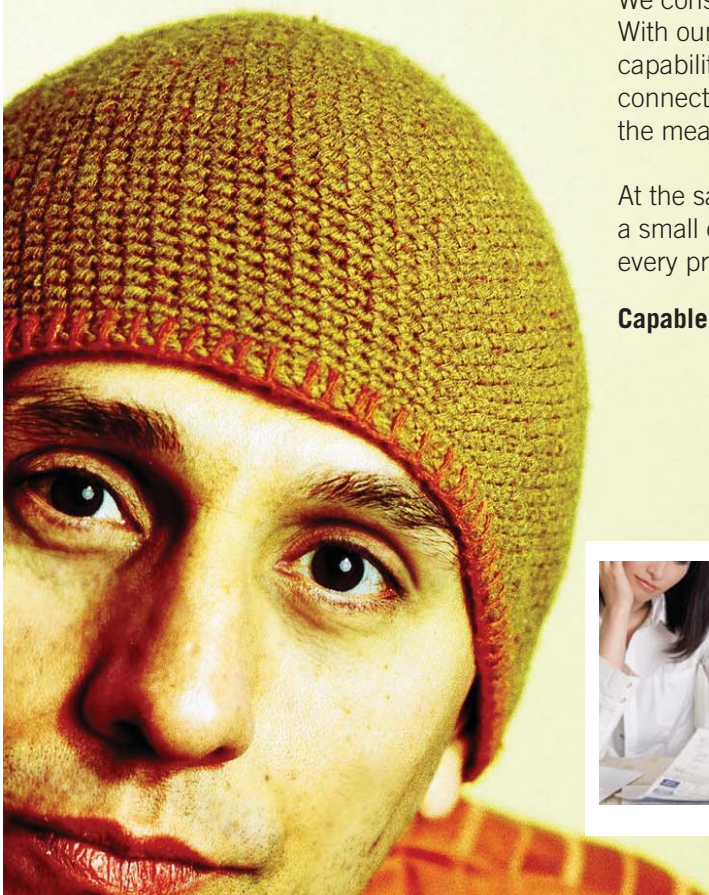
So what can be done to improve on survey quality from a panel member's perspective? A collective effort is required within the industry to educate researchers and sample-buyers on why survey quality matters and what it consists of in particular when it comes to online panel-based research. As well as setting the standards for what we expect of our respondents, we need standards for what our respondents should expect of us. Panel owners should work together to create and adopt a set of rules of engagement to define what is and is not acceptable in terms of fielding an online study.

Some examples of these rules could be:

- 1) Unless specific techniques are employed to maintain the engagement levels throughout, studies over a certain length should:
 - a. Be split and run as two studies (after all, one of the great benefits to panels is the ability to go back to the same sample with follow-up questions!).
 - b. Be designed using split-sampling approaches with data modeling so that each respondent takes a different, shorter path through the study.
- 2) Studies should not be finalized until the panel owners have had the opportunity to review them and to make suggestions to ensure that the tone and language is encouraging and appropriate.
- 3) Pre-testing should be used to check for survey design issues and studies modified in response to panel feedback or a review of where respondents have dropped out.
- 4) All studies should include the opportunity for panelists to rate them according to quality, length



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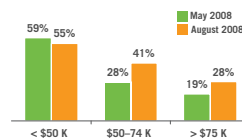
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and interest. This feedback should be passed on to the client and those clients whose studies are consistently rated poorly by respondents should be given additional guidance on how to make their studies panel-friendly (or even charged a premium!).

- 5) Panel owners should provide some guidelines for designing engaging studies, including perhaps examples of types of questions which can be employed within studies to add interest and to stimulate the respondent to continue, and recommended alternatives to some of the traditional ways to ask questions that are particularly fatiguing to panel members. (We recently produced a podcast covering some of these simple, practical tactics that can help to mitigate the effects of respondent fatigue through survey design. It can be downloaded at www.visioncritical.com/podcast/).

Such a set of rules of engagement might receive pushback from many clients but the hope would be that those who are smart will realize that panels that adhere to them will be less subject to some of the problem behaviors that lead to data quality concerns.

Problem behaviors

Peeling back one layer of the onion helps us to understand how we as researchers and panel owners may in fact be responsible for creating some of the conditions that encourage problem behaviors in respondents and therefore poor-quality data. But even if we get better at meeting our end of the deal as it stands currently, will this be enough to solve some of the issues surrounding online data collection – in particular, the too few taking part in too many? As already alluded to, willing participants in online research are not in fact an infinite resource: any panel member turned from a genuine and thoughtful contributor into a satisficer through repeated negative survey experiences is not that easily replaceable. By one panel's actions in disengaging a member, the rest of the industry may have lost a willing research participant. More generally, while Internet penetration may con-

tinue to increase in many markets, this does not necessarily equate to an increase in the pool of potential research panel recruits.

Given the finite amounts of free time and energy that individuals have to spend, the offering we make to research participants is also competing for their attention with other interesting activities and gainful opportunities. It is not clear that taking part in online research panels remains competitive in terms of the experience they offer Internet users; a key signal of this being the growing problem in recruiting and engaging younger and more Internet-savvy cohorts to participate in research panels.

In the main, Internet research remains a top-down experience: researchers pose set questions and respondents pick from a limited range of options to submit their answer. Also in the main, surveys remain linear and text-based. This is now at stark odds with Web 2.0 activities which revolve around user-generated content, individual expression and personalization and with the rich graphical interfaces, movies, music and interactive experiences that can now be found in the online universe.

Appeal that will engage

If we want participation in research projects online to have the kind of appeal that will engage those exposed to these types of online activities, we need to start using the same kind of Web technologies and approaches in conducting our research.

A division within our firm specializes in creating rich-media applications for research, such as more visually engaging versions of traditional research question types. This has filtered throughout our technology so that now, clients of our panel and research platform Sparq have self-service access to a variety of “visual questions” to deploy in their studies. Through a number of parallel test studies, use of these types of questions has been demonstrated to improve respondents' experience of participating in a study, to make them more likely to want to participate in a future study, and in fact to perceive that the time taken to complete the study was shorter (even when they

actually took more time than those taking a “flat” version). While more experimentation is needed to understand how collecting data in a more visually engaging way might differ from flat, text-based questions, unless we start to meet minimum expectations with respect to the visual and user-driven appeal that Web-based technology makes possible, online research participation just won't compete for attention.

Harder to argue

A final note: one of the advantages so frequently cited for Internet research over traditional offline methods is convenience: participants can complete surveys at a time of their choosing, in a place of their choosing, without the presence of an interviewer, therefore requiring much less intrusion than say, a telephone interviewer calling at dinner time. With the squeezing of fieldwork times, imposition of hard quotas and minimum participation requirements before a member gets purged, it becomes harder to argue that the commitment we ask of online participants is particularly minimal. But putting this to one side, the nature of Web browsing is also changing – the rise of Web-enabled phones means that browsing is an activity that can and will increasingly be done in those odd moments of free time, when on the move or waiting in line – leaving the more deliberate time sat at a PC for the more purposeful activities we now conduct online whether banking, e-mails, sharing photos, etc.

The next successful iteration of online research will be that which finds a way to re-widen the appeal of taking part in research in two key ways: firstly in being able to genuinely claim to provide an engaging experience, by utilizing the technology that the Internet can offer to take research well beyond CATI or pen-and-paper-style surveys; and secondly, in finding ways to reach and research participant more fluidly, in context and at times of their choice and convenience. From trying to force our research participants to conform to our requirements, we need to ask what the participant requires of us to make the exchange of their time, energy and ideas a fair and positive one. | Q



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Why do they do it?

Since we're all in the marketing research business, and respondent participation is the key to success, our firm thought it would be interesting to find out what respondents think of online research generally. Of course the respondents we contacted are all members of online research panels, so the response is biased in that respect. But most survey research done online uses panels, so these are the very people providing input for the surveys being fielded.

The basics of the research are as follows:

- 629 panel members responded. Ninety percent were a random sampling among Esearch.com panel members; and 10 percent were self-selected on the Web site.
- Forty-seven percent of the respondents were male, 53 percent female.
- Ages ranged from 13 to 65+.

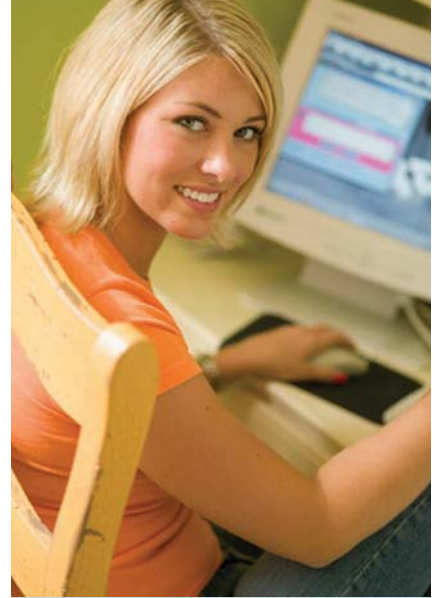
Here's what we found. In response to the question "What is your general opinion of online panel companies?" and using a 1-5 scale (1 - they are great; 2 - they are okay; 3 - neutral; 4 - they could do better; 5 - they are no good) most respondents indicated they think favorably of online panel companies. Seventy-nine percent say the companies are okay-to-great; 9 percent think they could do better. This high opinion holds across age and gender with no significant

difference in any group. While the respondents feel favorably toward online panel companies generally, 94 percent feel there is a significant difference in these companies (6 percent think all panel companies are the same). And while they feel there is a significant difference, only 45 percent have a favorite company - 56 percent don't. Specific respondent comments include:

"Some of the online survey panel companies seem to value their members more than others."

"I think it's interesting what companies want to find out. Sometimes the surveys are well written, and sometimes they could be better. They don't reward very well, but I enjoy doing them anyhow."

"I love the fact that my opinions are worth something and that they make a difference."



By Janet Westergaard

Research panels from the panelists' perspective

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



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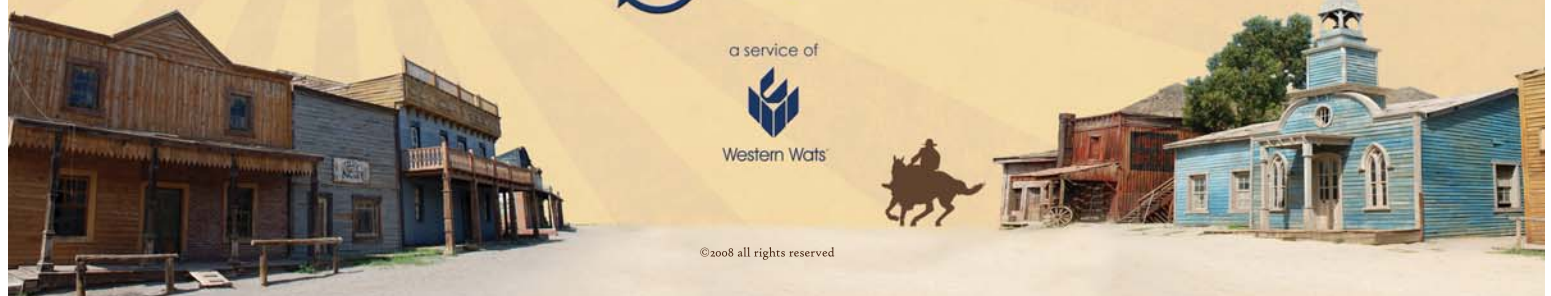
Duplicate internet respondents are a problem – Bloodhound™ sniffs them out. Bloodhound is our proprietary technology used to uniquely identify each respondent's computer. When it locates duplicates, you have the option to block them from starting your survey or flag them for additional analysis. There's no better way to track down and eliminate duplication across multiple panels. The best part is, when you use Opinion Outpost, Bloodhound is included with our bundled services at NO EXTRA COST. It's yet another way it pays to use Opinion Outpost.

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"I really enjoy being a part of online survey companies. It allows me to express my opinion and at the same time make a little extra income."

We asked the respondents if they had ever contacted an online panel company with a question or problem on a particular survey. About half (47 percent) had. The very good news is that 93 percent of these who had contacted a panel company got a response; 7 percent didn't. It looks like panel companies on the whole are doing a good job in communicating with respondents.

Two years or more

The panel members responding seem to be more Internet-savvy. The majority of respondents have been taking online surveys for two years or more: 78 percent of respondents reported to have started taking online surveys several years ago; 14 percent reported being new to online survey-taking, having started within the past six months. Younger respondents are reporting to be newer to online surveying, which isn't surprising since a lot of research focuses on respondents 18 and older, and the younger generations use the Internet as more of a social networking tool. Fifty-nine percent of the under 25-year-olds, and 37 percent of the 25-34-year-olds started taking online surveys within the past six months. Fifty-seven percent of those 35-49 and 72 percent of those 50-65 have been taking online surveys for three or more years. The study findings indicate that, the newer the respondent is to online survey-taking, the fewer panels they tend to belong to. The longer the respondent has been doing online research, the more panels they belong to. Of those who have been taking online surveys for three years or more, 76 percent belong to eight or more panels.

Being a member of a panel or panels is the avenue by which most get their survey invitations: 85 percent report to finding surveys via e-mail invitations from the panel companies, which isn't

surprising since the data came from panel participants. Other avenues respondents find surveys are through prompts on Web sites (24 percent), via unsolicited e-mail (17 percent), and "other" venues (5 percent). There is no significant difference across age and gender profiles.

When looking at the response base of online panelists, 38 percent report being a member of two to three online panels. Ten percent hold themselves exclusive to one panel. While 51 percent are members of four or more different panels (31 percent four to seven panels and 20.2 percent eight or more panels).

"Over the years, I have decided which panels waste my time and which don't. Thus, I have narrowed my panels to three."

"I think there are some that are out there just to try and scam people and others that are legitimate."

The number of surveys a person receives each day is directly related to the number of panels they belong to. People belonging to only one panel get fewer than one survey a day. Those belonging to four to seven panels are reporting to receive one to five surveys each day. Interestingly, the fewer surveys received, the greater likelihood of responding. People receiving less than one survey a day report actually taking one survey a week. People receiving one to five surveys per day report taking five to 10 per week - they seem to be more selective. Yet they are the ones belonging to multiple panels and looking for multiple surveys.

For the money

Why do people take online surveys? Most do it for the money (or chance of money): 54 percent reported this as the main incentive for taking surveys. Next, 33 percent reported their reason as the desire to give an opinion on important topics. Others reported a strong like to taking surveys (8 percent) as their main incentive,

while a few (4 percent) have a lot of extra time on their hands. Extra time is more prevalent with those under age 25 and over age 65.

Men are more concerned with the money than women. Similarly, the younger the respondent, the more they are looking for the payout. More of them are motivated by the cash while the older crowd likes giving an opinion (49 percent of those under 25 vs. 69 percent of those 65+ do surveys for the undiluted reason of giving an opinion). More women say their love of taking surveys is the main motivator behind doing them.

Those people belonging to multiple panels seem to be doing it more for the potential payout as well: 88 percent of panelists belonging to eight or more panels do surveys for the money. Only 64 percent of those belonging to one panel feel the same.

"I am really happy to offer my opinions online since I am normally very quiet and do not verbalize my opinions very often."

"There are several surveys that I really enjoy taking more than others ... In general, I like surveys that are really looking for an honest opinion from me. Some of the multiple choice surveys don't really have an answer listed that I feel actually represents my feelings or concerns about the products or services that they're presenting."

The best incentive to offer for surveys is cash: 91 percent of respondents reported this as best. Gift cards and certificates won 52 percent of the vote. Points and raffles are not as desired (31 percent and 29 percent respectively). A point to note however, is that the younger respondents, while preferring cash, report also to be motivated by raffles: 43 percent said they liked raffles with large cash prizes paid to a few respondents. No other age group felt the same.

"They could do away with the drawings for cash prizes and just give

cash to everyone. I don't believe the cash is ever won. They don't post any winners."

"I believe that the most legitimate survey companies pay a little cash, or points in exchange for quality merchandise, for a person's time and thoughtful input. I do not like it when you have to take 50-100 surveys to accrue enough points for anything. I usually avoid those."

Respondents definitely have an opinion on how long the interviews should be. The majority put the range at 11-15 minutes. This is consistent across gender, but not age. The younger the respondent, the shorter they prefer the interviews. Those under 25 thought the best range was five to 10 minutes. The older the respondents, the more tolerant they are on time, but still the majority stated an 11-15-minute survey as optimal.

Only 17 percent (across the board on age and gender) felt the length of interview didn't matter as long as the compensation reflected the time. Very few in any age felt interviews are okay at 20 minutes or more (only 2 percent).

We asked, "Have you ever received an invitation to the same survey from multiple panel sources?" Thirty-four percent said yes, they had; 65 percent had not.

Then we asked, "If you have received the same survey from multiple panels, what did you do?" Forty-five percent said they took it more than once; 51 percent said they deleted one of the invitations.

The online research industry as a whole is implementing controls on panel respondents tracking through IP addresses, cookies and system configurations, and this seems to be very prudent given the responses above.

We further asked, "Do you think the data collected through an online survey is valid? Do people tell the truth on the surveys?" Seventy-two percent thought people were truthful while 25 percent didn't know. Three percent felt it wasn't valid (no respondents in the 25-34 or 65+ age range felt

the research wasn't valid).

Are favorable

People belonging to online panels are favorable towards survey research. Many seek out opportunities to belong to panels with the majority belonging to more than one. Researchers should keep in mind that panelists fatigue might be setting in with interviews over 15 minutes, with the optimum length (in the eyes of respondents)

being 11-15 minutes. As far as rewards, cash is king, with most all respondents stating this as their most preferred incentive. Generally speaking, panel members like very much being offered the opportunity to state their opinions and these people have positive opinions of online panel companies. The responses indicate that as whole, panel providers are doing a good job maintaining and communicating with their members. | Q



Mail Surveys...They Still Work

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Survey Monitor

continued from page 12

“Young adults and minorities represent tremendous opportunity,” says Menke. “Echo Boomers comprise a quarter of today’s population and span two decades; minority groups are some of the fastest-growing in the U.S. By helping these individuals prepare for future homeownership, lenders can tap their demographic power and lead them to eventual home-buying success.” For more information visit www.mintel.com.

Americans passing on travel packages

More than 75 percent of Americans say they like to make their travel arrangements themselves, according to a study conducted by London research company TNS Global on behalf of the U.S. Tour Operators Association (USTOA), New York. Only 10 percent said they mostly buy independent tours (an itinerary you can do on your own), and 5 percent said they buy vacation packages (separate elements bundled together). Yet the USTOA has found that travelers save an average 20-30 percent when buying the same arrangements in a vacation package or tour rather than on their own.

“The survey points out that clearly there are tremendous prejudices and misconceptions to overcome about packaged travel versus independent travel,” says Bob Whitley, USTOA president. Whitley points out that many people don’t realize they can buy the same independent arrangements directly from a tour operator or through a travel agent and save money.

Baby Boomers were the most likely to choose packaged travel, with 30 percent of Boomers saying they enjoyed independent touring. This echoes findings of a 2006 USTOA consumer survey, which found that 70 percent of consumers age 55-64 were likely to buy a tour or vacation package because of the savings. The survey also found that attaining a higher level of education is associated with an increased preference for independent touring. Thirteen percent with a college education selected independent touring. For more information visit www.ustoa.com.

The generations judge one another

As generations are grouped and named, it begs the questions of what those in the same age group have in common, or what other people view the generation as having in common. Generation Y (ages 13-31) is seen as the most self-indulgent, Generation X (ages 32-43) most innovative and Boomers (44-62) as most productive. Most admired are the silent (ages 63-83) and the greatest (ages 84+) generations, according to research conducted by Rochester, N.Y., research company Harris Interactive on behalf of San Francisco investment services company Charles Schwab. The results show how very differently people view the different generations, with many people holding strong positive and negative opinions about them.

Baby Boomers (35 percent) are most viewed as having a positive effect on society, followed by Generation X (25 percent). The silent generation (33 percent) and the

greatest generation (30 percent) are the most admired generations, followed by Baby Boomers (22 percent). The silent generation (40 percent) and Baby Boomers (33 percent) are viewed as the most generous. The two generations seen as the most productive are Baby Boomers (45 percent) and Generation X (32 percent). A 53 percent majority (including a majority of Generation Y itself) believe Generation Y is the most self-indulgent, followed by Generation X (25 percent). A 41 percent plurality sees Generation X as the most innovative, followed by Baby Boomers (25 percent) and Generation Y (22 percent). There is no consensus as to which generation is most socially conscious, but Baby Boomers (34 percent) and Generation X (26 percent) top the list.

Generation Y would like to rename themselves the “Internet generation” (32 percent). Generation X would choose to rename themselves “generation tech” (25 percent). Baby Boomers are the only generation which seems to really like the name given to them (27 percent). The silent generation would rename themselves the “responsible generation” (44 percent).

These findings show that two widely-held views are false. One is that America is riddled with ageism and that younger people have no respect for older people. While there is surely some prejudice against older people which sometimes leads to age discrimination, the two oldest generations – the silent and the greatest generations – are much more admired than any other generation.

Another common belief, shown to be false in this survey, is that Baby Boomers are seen as particularly self-indulgent or even greedy. In reality, Boomers get higher marks than other generations for being socially-conscious, productive and having a positive effect on society. For more information visit www.harrisinteractive.com.

Ownership of vehicle navigation systems expected to grow

According to results from Farmington Hills, Mich., research

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company Morpace Inc., over 25 percent of respondents indicate that they currently own some type of vehicle navigation system. The rate of ownership of this technology is highest for married respondents and those earning at least \$50,000 annually. Thirty-nine percent of non-owners plan to purchase a navigation system in the future.

Portability is especially important among those who own or are considering a navigation system. Nearly three-quarters of respondents prefer a navigation system that can be moved from vehicle to vehicle versus a system built into the dashboard of their vehicle or a system integrated into a cell phone. Prevention of getting lost is ranked as the highest reason for owning a navigation system. Other important reasons include the convenience of not having to pre-plan a route and the ability to change routes on the fly.

Of those not interested in navigation systems, 36 percent say it's primarily because they don't need them rather than because of cost, and 67 percent cite they don't travel to unfamiliar places often enough or they don't mind using maps or Internet-based directions. Only 14 percent cite cost as the primary reason. For more information visit www.morpace.com.

Teachers an active and savvy market segment

More than half of teachers have traveled abroad in the past few years, one-fourth of them are always buying the latest high-tech gadgets to hit store shelves and 73 percent of them seek out stores that carry their favorite brand names, according to a report issued by MDR, a Shelton, Conn., education sales and marketing company, based on research conducted by Experian Consumer Research, New York.

Almost 80 percent say that the Internet has influenced how they learn about products, with 49 percent revealing that they have used the Internet to research or obtain information within the past month. The report finds that teachers stand out from the general population because they are more likely to be mar-

ried, have children and own their own homes. The mean household income for educators is \$117,000, compared with the mean household income of \$80,900 for the general pool of survey respondents. Sixty-two percent invest compared with 38 percent of the general population, and educators have 403(b) accounts with no preselected providers so teachers are more proactive in their investment decisions compared with other U.S. workers.

Teachers are brand-loyal consumers who are more likely to pay a premium for quality, while still keeping an eye on good bargains. Seventy-seven percent of the teachers surveyed say they would pay more for a high-quality product; 65 percent indicate that they shop for bargains or discounts, compared with just 53 percent of the general public; 75 percent of the teachers surveyed say that they do their homework before making a purchasing decision on expensive items; and 92 percent have and use credit cards once a purchase decision is made. For more information visit www.smr.com.

Job searchers young, educated, athletic and online

Online job searchers, those adults who have conducted an employment search online during the past month, represent a youthful, educated, racially-diverse group, according to research from Scarborough Research, New York. Online job searchers are 62 percent more likely than the total adult population to be ages 18-34; 23 percent more likely to have at least some college education; and 47 percent more likely to be African-American.

Scarborough also finds that San Francisco and Norfolk, Va., are the leading markets for online job searchers. Sixteen percent of consumers in these markets searched online for employment during the past month, versus the national average of 12 percent.

People already employed full-time or part-time are more likely to conduct online job searches

than those who are not employed. While the majority of employed online job searchers are white-collar (68 percent), about one-third (32 percent, or almost 7 million) are blue-collar. Online job searchers tend to come from mid- to upper-income households. Even though they are already well-educated, online job searchers have a thirst for more knowledge or career advancement. They are nearly two-and-a-half times more likely than adults overall to plan to go back to school during the next year and 63 percent more likely to have engaged in an adult continuing education program during the past year.

"Job search Web sites are used daily by all types of people seeking employment, especially the young, educated and currently-employed," says Gary Meo, senior vice president, digital media services, Scarborough Research. "To differentiate themselves in a crowded marketplace, job search Web sites would do well to understand the job seeker's desired geography, in both local and expanded job searches. Knowing the local-market characteristics of the job searchers' desired location can help sites better position their services to both employers and applicants."

Online job searchers are more likely than other Internet audiences to be avid downloaders of digital content, such as music, television programs, video games and podcasts. In fact, they are heavy Internet users overall, going online to do everything from paying bills and making travel reservations to e-mail and weather.

From a lifestyle perspective, online job searchers are more active and athletic than the average person and considerably more likely to engage in activities such as basketball, jogging, tennis and yoga. They are also more likely to enjoy a wide variety of social events, including attending rock and R&B/hip-hop concerts, visiting art museums and going to the zoo. For more information visit www.scarborough.com.

Product and Service Update

continued from page 16

Arbitron releases ROI sales toolbox

New York research company Arbitron Inc. has released a 10-piece marketing kit designed to help radio station sales executives in Portable People Meter (PPM) markets demonstrate radio's effectiveness at reaching consumers.

The toolbox contains a detailed explanation of the change in the delivery of gross rating points (GRPs) that occurs with the transition to electronic measurement, training opportunities and a detailed account from an industry veteran who has made the transition to selling with PPM data. The complete packet is mailing to station executives in New York, Middlesex-Somerset-Union, Nassau-Suffolk, Los Angeles, Riverside, Chicago, San Francisco and San Jose.

Arbitron's 10-piece toolbox includes a collection of materials intended for all stations in PPM markets, regardless of format, market or targeted demographic. The 10 components to the toolbox are: "The Audience Is the Same - Only the Measurement Has Changed," a note card providing quick answers to advertisers who challenge the need to adjust their buys to reflect the change in GRPs; "Planning and Buying Radio Advertising in a PPM World," a brochure detailing the change in GRPs that comes with the transition to electronic measurement; "SQAD Monthly Excerpt," Arbitron's explanation of how to adjust cost-per-thousand estimates in PPM markets based on data from SQAD; "PPM 'Learn to Earn' Training for Radio Sellers," a brochure highlighting available training options for understanding and utilizing PPM data from a sales perspective; "Arbitron PPM Passport Training Program," a list of several brochures that can be used on visits with agencies; "Guide to Understanding and Using PPM Data," a basic run-through of the new concepts and terminology

associated with PPM and electronic measurement; "PPM Trailblazer," an industry veteran provides a personal account of the advantages of making the switch to PPM data; "2009 TV and Radio Survey Calendar," survey dates for Arbitron and Nielsen Media Research; "You Can't Spell Radio Without ROI," a poster to use as a reminder about the value radio provides; and "Radio Retains 92 Percent of its Audience During Commercials," a brochure that includes data from a study conducted by Coleman, Media Monitors and Arbitron. For more information visit www.arbitron.com.

Itracks debuts online community research solution, Populis

Itracks, a Saskatoon, Saskatchewan, research company, has released details of its new online community research solution, Populis. Itracks intends to use Populis in comparative research studies of existing customers to prove that community members purchase significantly more products and services than non-members. Populis was also designed to track client referral rates, customer satisfaction levels and loyalty.

Populis, developed internally by Itracks' custom software division, integrates with its existing research tools and is designed to serve as a landing point for online qualitative and quantitative research. The software is designed to allow companies to synthesize Web 2.0 technologies and utilize the benefits of user-generated content. For more information visit www.itracks.com.

New Vovici program supports offline survey data collection

Dulles, Va., research company Vovici has released Vovici Mobile Survey - PC Edition, which works in conjunction with EFM Community, Vovici's enterprise feedback management platform, and is designed to allow organizations to collect survey data offline on any PC and then upload the data to a centralized response database. Users can gather data via Windows Vista or XP-based PCs and upload

the captured responses to a server-hosted response database once an online connection has been reestablished.

Vovici Mobile Survey - PC Edition is built on Vovici's EFM Community platform and works with both enterprise and professional versions. All responses gathered from Mobile Survey - PC Edition are co-located with survey responses received from other modes to ensure that all feedback is integrated and available for reporting. For more information visit www.vovici.com.

Ipsos introduces Poll Predictor for Facebook

Ipsos Interactive Services, the Bucharest, Romania, division of Paris-based research company Ipsos, has released Poll Predictor, a new interactive tool designed for the online social networking community Facebook.

The game challenges users to correctly guess the percentage of "yes" answers to all types of fun questions initially put to Ipsos panelists in the U.S. Participants can guess, for example, just how many Americans make their bed in the mornings, what percentage believe in UFOs and what proportion would tell on a cheating friend.

The questions used for the game were drawn from a recent survey conducted across the U.S. to determine the behavior of the American public, asking over 1,100 questions covering a wide variety of topics.

Poll Predictor on Facebook aims to strengthen the Ipsos i-Say brand to a younger user base. For more information visit www.ipsos-interactive.com.

QRCA aids employers and seekers

The Qualitative Research Consultants Association (QRCA), Glastonbury, Conn., has launched a free service to help buyers of qualitative research find a researcher for their projects. The new feature is accessed on the QRCA Web site (www.qrca.org) by clicking on the Projects/Jobs tab on the left side of the homepage. In addition to the

project postings, organizations looking to hire an on-staff researcher can post positions, also within the Projects/Jobs link. Organizations can post projects – such as RFPs, limited engagements, contract positions and full-time positions – all free of charge.

Once projects and jobs are posted, QRCA members can browse the postings and respond as appropriate. For more information visit www.qrca.com.

Briefly

E-Tabs, a London research software company, has launched a new version of Enterprise, a product that automates graphs and charts that will now work within the Microsoft Office 2007 suite.

Additionally, E-Tabs has launched a plug-in for the SPSS Dimensions suite of analysis products. The plug-in is designed to enhance printing, viewing and reporting links for Desktop Reporter and other products within the SPSS Dimensions suite. For more information visit www.e-tabs.com.

Research Now, London, and Reed Business Information (RBI), a Netherlands-based business-to-business publisher, have partnered to create online panels for the business-to-business research sector. Research Now and RBI intend to build, operate and sell online panels of business professionals. Each panel will be by invitation only, stand-alone and research-only. The panels will be profiled using 70+ parameters with a series of tailored incentives and respondent specific content to encourage active participation and engagement.

Additionally, Research Now has launched an online panel in India. For more information visit www.researchnow.co.uk.

A Des Moines, Iowa, research company, iEmergent, has debuted its new line of demographic mortgage forecast reports that assess lending opportunities and show loan distribution patterns among various home-buyer and loan-type

segments including ethnicity, race and gender. For more information visit www.iemergent.com.

Globalpark, a New York research company, has released Version 6 of its enterprise feedback suite (EFS). Version 6 includes a set of Flash-based question types, increased functionality for the user to comment on and offer improvement suggestions for the software, a revised translator interface for multilingual projects and further updates to EFS Panel, EFS Employee and EFS Survey. The upgrade is free of charge for licensed customers. For more information visit www.globalpark.us.

The StreetDVD 2007, from East Brunswick, N.J., research company GeoLytics, is a six-DVD product that includes recent street data, new economic census boundaries and updated voting districts. StreetDVD 2007 is designed to allow users to import geographic data into ArcView and MapInfo using a Windows interface. In addition to economic census boundaries and voting districts, the StreetDVD 2007 provides classifications and data for roads, railroads, hydrography and landmarks, as well as legal, statistical and administrative boundaries for census, transportation and education. For more information visit www.geolytics.com.

Chicago research company SPSS Inc. has unveiled SPSS Viz Designer, which features graphic technology designed to create and share visualizations that clarify results from SPSS Predictive Analytics software. With SPSS Viz Designer, users with little or no programming skill may create customized visualizations that reflect branding and style standards to create a consistent look and feel for internal presentations. For more information visit www.spss.com/vizdesigner.

Ipsos in North America, the New York division of Paris-based research company Ipsos, has updated its Interactive Forum (IAF), a

custom panel platform that includes the panelist database, survey scripting and research results data. Key features of the updated IAF software include multilingual capabilities and direct client access to online real-time data with multiple reporting and data export formats, such as PDF, Excel and SPSS. Each custom panel is branded to match client specifications. For more information visit www.ipsos-na.com.

Australian research company QSR International has released a new version of its qualitative research software NVivo 8. NVivo 8 is now available in English, simplified Chinese and Spanish. Following the Japanese version of NVivo 7 released in 2007, a new Japanese version of NVivo 8 is also being released. Additional language versions are also under consideration. For more information visit www.qsrinternational.com.

20/20 Research Inc., Nashville, Tenn., has launched QualMeeting Version 1.0, which uses Webcam technology and streaming video to assist in conducting live, online, one-on-one interviews and focus groups. For more information visit www.qualmeeting.com.

MRT Services Inc., an Atlanta research company, has released its Integrated Transcription System, which is designed to integrate responses to a single set of questions from multiple transcripts. For more information visit www.mrtservices.com.

Survey Sampling International, a Fairfield, Conn., research company has expanded its business-to-business online research communities, particularly in North America. Marketing researchers will have access to more than 3.6 million profiled business and IT professionals to support their B2B sampling needs. Nearly three million of the respondents are in North America, while more than 300,000 each are offered in Europe and Asia. For more information visit www.surveysampling.com.

Research Industry News

continued from page 18

of Wilton, Conn., research company **Greenfield Online**, to **ZM Surveys LLC**, a Brookline, Mass., research company affiliated with ZM Capital LLC. The transaction is in connection with the acquisition of Greenfield Online Inc. by Microsoft.

T3i Group LLC, a Parsippany, N.J., research consultancy, has acquired the **Telecom Intelligence Group** (TIG) division of Access Intelligence, a Rockville, Md., research company. The acquisition closed on August 1, 2008. TIG's name has been changed to T3i Group. T3i Group is a newly-formed entity established specifically to make this acquisition.

Paris research company **Ipsos** has acquired **Alfacom**, a Sao Paulo, Brazil, automotive research company which services almost all the car manufacturers active in Brazil and through Latin America. Ipsos has acquired 100 percent of the share capital of the company from its managers. Renato Fecchio will remain the president of the company, which will be integrated within Ipsos Loyalty at both the regional and worldwide levels.

TechWeb's **Light Reading Communications Network**, a Manhasset, N.Y., research company, has acquired **Pyramid Research**, Cambridge, Mass. Pyramid will be integrated with TechWeb's Heavy Reading, a division of Light Reading.

Alliances/strategic partnerships

MRops, a Doylestown, Pa., research company, has entered into an agreement with San Francisco research company **Peanut Labs** for its survey tool Optimus in an effort to provide improved survey data quality to its clients.

MultiMedia Intelligence, a Scottsdale, Ariz., research consultancy, and **Experian Consumer Research**, New York, have partnered to examine the 12-17-year-old population using wireless phone services.

E-Rewards Europe Limited, the London division of Dallas research company e-Rewards, and **Airmiles**, a U.K. travel loyalty program, have partnered to invite Airmiles' members to enroll in the e-Rewards Opinion Panel and collect Airmiles by participating in online market research surveys.

Macy's Inc., a Cincinnati-based retailer, has entered into a multiyear agreement with **DunnhumbyUSA**, a Cincinnati research firm, under which Macy's will be DunnhumbyUSA's exclusive client in the department store category. DunnhumbyUSA will analyze Macy's customer sales data and develop customer group models.

Awards/rankings

Inc. has announced its annual Inc. 5000 ranking of the fastest-growing private companies in the country.

GMI, a Seattle research company, ranked 753rd on the list, with three-year revenue growth of 464 percent from 2004 to 2007. GMI also ranked favorably on several of the publication's 2008 Inc. 5000 Top 100 Lists, including: 59th in the marketing and advertising industry and 23rd in the Puget Sound region.

Additionally, **Gongos Research**, Auburn Hills, Mich., has been named to the Inc. 5000 list. This year, the company rose in rank, experiencing a 55.9 percent three-year growth.

Decipher, a Fresno, Calif., research company, has been recognized by the U.S. Local Business Association as the winner of the 2008 Best of Fresno Award in the Market Research and Analysis category.

Reston, Va., research company **comScore Inc.** has been recognized in the 35th annual Honomichl rankings as the 16th-largest U.S. market research firm and the 20th-largest firm globally, based on 2007 revenues.

New accounts/projects

New York research company **TNS** has adopted Dulles, Va., research company **Vovici's** enterprise feedback management platform and Community Builder Module as

its standard platform for building custom online panels and communities for its customers.

The city of Frankfort, Ky., has signed a Small Municipal and County Government Enterprise License Agreement with **ESRI**, a Redlands, Calif., geographic mapping software company. This agreement allows all staff in the capital city's government to access geographic information system (GIS) software.

Separately, **CCIM Institute**, a Chicago commercial investment brokerage real estate network, will implement a GIS solution developed by ESRI at the heart of its new commercial property listing and data exchange service platform. The portal will manage commercial property listings for sale and lease throughout the U.S.

ATP Canada Software and Services Ltd., an Ontario, Canada, data processing company, and **Starfire Consulting LLC**, a Sparks Glencoe, Md., retail consulting company, have entered into an agreement whereby Starfire Consulting will provide sales and marketing assistance for ATP's Rosetta Studio in the capacity of official sales agent.

EMI Surveys, a Hyde Park, London, research company, has entered into an agreement with **Itracks**, a Saskatoon, Saskatchewan, research company, to expand EMI's qualitative offerings using Itrack's online qualitative software applications.

LevelVision LLC, a Roanoke, Va., media and digital signage company, has signed an agreement with New York research company **Arbitron Inc.** for Arbitron custom research studies to measure store traffic, engagement with and reaction to its medium.

Additionally, Arbitron has expanded its sample-quality improvement programs for diary markets. The new efforts are designed to further enhance the participation of 18-34-year-olds in diary-based radio ratings services. Arbitron plans to add cell phone-only households to the survey sample in 125 diary markets

beginning with the Fall 2009 survey; increase cash and other incentives for persons age 18-34 while reducing incentives for those 55-plus-only households in all diary markets; and accelerate the development and deployment of electronic and online alternatives to the paper-and-pencil diary for all markets.

New companies/new divisions/relocations/expansions

Applied Marketing Science, a Waltham, Mass., research company, has expanded its office space by 50 percent. The mailing address of the company has not changed.

Innovative Concepts, a New York-area research company, has relocated its call center to Long Island City, N.Y., in the facilities of Opinion Access Corp. The company has also opened a bilingual call center in the Dominican Republic.

Survey Sampling International, a Fairfield, Conn., research company has moved to new global headquarters: International Place, 6 Research Drive, Shelton, Conn.

Research Now, London, has opened a new office in Dallas. The office will be headed up by Joe Cunningham, vice president, client development.

Additionally, Research Now, has launched in Asia. The group will initially be represented by two new operations in the region, one in Shanghai and one in Singapore. In addition to the new operations, Research Now has also launched eight new proprietary online panels in the region to support the growing international demand for Asian opinion.

Toluna, a New York research company, has expanded into the Asia-Pacific region with the opening of a new office in Sydney, Australia, headed up by Mike Billingsley.

Information Services Group Inc., a Stamford, Conn., research company, has formed a new business unit with TPI, a Houston data

advisory firm. The new unit, TPI Momentum, will assist the service provider community in addressing the needs of today's buyers of outsourcing and offshoring services.

BrainJuicer Group PLC, a London research company, has furthered its global expansion by establishing a presence in both Australia and Switzerland.

Research company earnings/financial news

In the first half of 2008, Paris research company **Ipsos** has reported revenues of EUR 462.8 million, up 4.5 percent compared with the same period of 2007. This performance was shaped by three contrasting factors: a negative currency effect of 7 percent; a positive consolidation effect of 3.1 percent with companies acquired since July 1, 2007, being included in the scope of consolidation; and first-half organic growth of 8.4 percent. As a proportion of revenue, gross margin continued to rise, from 60.0 percent in the year-earlier period to 61.6 percent.

Harris Interactive, a Rochester, N.Y., research company, has released results for its fourth fiscal quarter and fiscal year ended June 30, 2008. Consolidated revenue was \$63.5 million, at the mid-point of guidance, and up 11 percent when compared to the same period last year. Favorable effects of foreign currency exchange added \$0.5 million in the quarter. Pro forma organic revenue growth of 12 percent in Europe was countered by a 7 percent decline in North America, which caused consolidated pro forma organic revenue to decline by 3 percent.

\$2.7 million in restructuring and other unusual items, along with the preliminary \$123.0 million goodwill impairment charge, created a (\$124.2) million operating loss for the quarter, compared with operating income of \$4.2 million reported for the same period last year. The net loss for the quarter was (\$121.2) million, or (\$2.28) per share, compared with net income of \$3.4 million

or \$0.06 per fully diluted share for the fourth quarter of fiscal 2007.

Revenue for fiscal year 2008, which ended on June 30, 2008, was \$238.7 million, and up 13 percent when compared with \$211.8 million of revenue reported for fiscal year 2007. Favorable effects of foreign currency exchange added \$2.5 million in the fiscal year. European pro forma organic revenue grew 6 percent, but North American pro forma revenue declined 3 percent, pushing consolidated pro forma organic revenue down 1 percent.

Operating loss for the fiscal year, including \$4.6 million of restructuring and other unusual items and an estimated \$123.0 million goodwill impairment charge, was (\$121.1) million, compared with operating income of \$12.3 million last year. Net loss for the full fiscal year was (\$120.2) million, or (\$2.27) per share, compared with net income of \$9.1 million or \$0.16 per diluted share in fiscal 2007.

BrainJuicer Group PLC, a London research company, has announced its interim results for the six months ended June 30, 2008. Significant top-line organic growth with revenue rose by 37 percent to £3,970,000. Operating profit increased by 33 percent to £196,000. Profit after tax increased by 42 percent to £161,000.

The GfK Group, a Nuremberg, Germany, research company, has announced results for the second quarter of 2008. Organic growth in sales rose by 11.4 percent in the second quarter. Adjusted operating income rose by 13.4 percent on the same quarter in the prior year. In the first half of 2008, organic growth in sales amounted to 8.4 percent (prior year 4.9 percent) and sales increased overall to EUR 589.7 million. Adjusted operating income for the first six months rose to EUR 66.8 million (5.2 percent up on the prior year). Performance was particularly strong in emerging markets and the retail and technology sector.

Names of Note

continued from page 14

QA Research, York, U.K., has hired **Michael Fountain** as head of communities research.

Information Resources Inc., an Arlington, Va., research company, has appointed **Hans Jessen** as executive vice president and managing director of European services and global analytics delivery.

Polaris Marketing Research, Atlanta, has named **Kelly Korell** and **Kelly Kwon** data analysts in its analytics department.

Simon Braier has joined London research company *Kadence* as qualitative research director.

Allan Julian has rejoined Indianapolis research company *Harper* as vice president of health care research.

Matt Bruce has been named national sales director for *Nielsen Online*, a division of New York researcher The Nielsen Company. Bruce will be based in Sydney, Australia.

London research company *infoUK* has hired **Steve Heath** as head of production and delivery.

Tom Webster has been promoted to vice president, strategy and marketing, at *Edison Media Research*, Somerville, N.J.

Lightspeed Research, Basking Ridge, N.J., has added five new members to its London office: **Heather Mondesir**, sales coordinator; **Rupak Sharma**, project manager; **Stacey Wright**, project manager; **Valle Castro Bermejo**, account manager for Spain; and **Sara Toribio**, project manager.

Steve Davis has joined *e-Rewards Market Research*, Dallas, as executive vice president and COO.

Oslo, Norway, research software company *Confermit* had added **Todd Yancey** as vice president, strategic accounts.

Based in Chicago, **Anthony Milano** has joined *Satyam Computer Services*, an India-based IT company, as vice president and head of market research and analytics.

Baltimore direct marketing company *Vertis Communications* has named **Jerry Cacciatore** senior vice president, premedia operations.

Research Now, San Francisco, has hired **Joe Cunningham** as vice president, client development, in Dallas; **Lamont Lambert** as vice president, client development, in New York; **Heather Upham** as client development executive, in New York; **Mauricio Vasquez** as assistant client development manager, in Los Angeles; and **Alexis Unzeitig** as client development executive, in San Francisco.

PhoneBase Research Inc., Fort Collins, Colo., has promoted **Chauncy Bjork** to general manager and **Richard McCaffery** to director of call center operations.

Jennafer Stahl has joined *Invoke Solutions*, a Stamford, Conn., research company, as a research director.

Resolution Research & Marketing Inc., Denver, has hired **Jacqueline Brown** as research and analytics director and **Jim Callihan** as senior methodologist.

Lieberman Research Worldwide, Los Angeles, has added **Mark Hartstone** and **Soumya Roy** as senior marketing and research consultants to its London office.

E-Poll Market Research, Encino, Calif., has hired **Deepa Iyengar** as senior research director.

The Marketing Research Association, Glastonbury, Conn., has appointed **Ruth Freedman** as vice president of development. Freedman will take the place of recently-resigned vice president of development **Lucy Haydu**.

Authentic Response, a New York research company, has hired **Peter Brownstein** and **Shane Abel** as regional sales directors.

The Wisconsin Department of Tourism, Madison, Wis., has hired **Sarah Klavas** as brand manager.

Nickelodeon/MTVN Kids and Family Group, a New York broadcast network, has named **Jane Gould** vice president, consumer insights.

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www.quirks.com

2008

Research Panels



Directory

Welcome to the annual directory of research panels. This directory was compiled by contacting those firms we identified as having research panel services. The directory contains nearly 170 firms that have over 460 panels available. The company listings, which begin on the next page, list the company's contact details, as well as a list 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, online). 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 113, 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 Alice Davies, alice@quirks.com, to get the panel listed in our database.

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Codes

To search for panels by industry or audience, please use the cross-index section on page 113.

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

ACNielsen

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



The OTHER Sampling Company in CT

Affordable Samples, Inc.

185 Sound Beach Ave.
Old Greenwich, CT 06870
Ph. 800-784-8016 or 203-637-8563
E-mail: 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 p. 91)

all global

Zetland House
5-25 Scrutton St.
London EC2A 4HJ
United Kingdom
Ph. 44-20-7729-1400
E-mail: clientservices@allglobaltd.com
www.allglobaltd.com
Tony Burke, Director
Panel Titles:
all global Online
Size: 200,000 Type: Online
all global Palliative Care Panel
Size: 18,000 Type: Online

Amplitude Research, Inc.

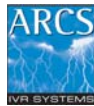
2255 Glades Rd., Suite 324A
Boca Raton, FL 33431
Ph. 877-225-7950
E-mail: sales@amplituderresearch.net
www.panelspeak.com
Stephen S. Birnkrant, CEO
Proprietary Panel Mgmt.: Yes
Panel Titles:
Panelspeak Small Business Panel
Size: 20,000+ Type: Online
Panelspeak Technology Panel
Size: 10,000+ Type: Online

AMR Interactive

Level 14, 235-243 Jones Street
Ultimo
Sydney, NSW 2007
Australia
Ph. 61-2-9020-6700
E-mail: 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

Anderson Analytics, LLC

154 Cold Spring Rd., Suite 80
Stamford, CT 06905
Ph. 888-891-3115 or 203-912-7175
E-mail: inquiries@andersonanalytics.com
www.andersonanalytics.com
Tom Anderson, Managing Partner
Proprietary Panel Mgmt.: Yes
Panel Titles:
GenX2Z.com
Size: 10,000 Type: Online

**ARCS® IVR Systems**

565 Virginia Dr.
Fort Washington, PA 19034-2706
Ph. 800-336-7674 or 215-653-7100
E-mail: tantoniewicz@m-s-g.com
www.arcsivr.com
Tim Antoniewicz
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

304 Park Ave. S., 7th Floor
New York, NY 10010
Ph. 1-888-AR-PANEL
E-mail: info@authenticresponse.com
www.authenticresponse.com
Jeff Mattes, Vice President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Authentic Response Global B2B Panel
Size: 2,000,000+ Type: Online
Authentic Response International Consumer
Size: 1,000,000+ Type: Online
Authentic Response U.S. Consumer Panel
Size: 3,000,000+ Type: Online

AutoPacific, Inc.

2991 Dow Ave.
Tustin, CA 92780-7219
Ph. 714-838-4234
E-mail: dhall@autopacific.com
www.autopacific.com
Panel Titles:
AutoPacific Vehicle Owners Panel
Size: 10,000 Type: Online

B&N PanelWizard BV

Westerkade 15-5
9718 AS Groningen
Netherlands
Ph. 31-50-3171-777
E-mail: info@panelwizard.com
www.panelwizard.com
Proprietary Panel Mgmt.: Yes

Berenhaus Research Solutions, LLC

37 Jamie Court, 2nd Floor
Bloomfield, NJ 07003
Ph. 973-566-0095 or 973-495-9411
E-mail: 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
E-mail: brodriguez@brandinst.com
www.brandinst.com
Panel Titles:
Brand Institute Panel

BuzzBack Market Research

25 W. 45th St., Suite 202
New York, NY 10036
Ph. 646-519-8010
E-mail: info@buzzback.com
www.buzzback.com
Proprietary Panel Mgmt.: Yes
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
E-mail: info@crresearch.com
www.crresearch.com
Robbin Jaklin, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
KidzEyes.com
Size: 16,000 Type: Online
LatinoEyes.com
Size: 5,000 Type: Online
TeensEyes.com
Size: 20,000 Type: Online

C&R Research is a full-service market research company specializing in qualitative and quantitative research within the B2B and B2C segments. Widely recognized for its expertise in a broad range of research methods, C&R offers clients customized solutions and targeted, actionable results. Its various divisions - KidzEyes®, TeensEyes®, MomsEyes®, LatinoEyes®, BoomerEyes® and ShopperEyes™ - provide expert insights into specific demographics, and its online youth and Hispanic panels, coupled with omnibus services, offer compelling and timely client data.
(See advertisement on p. 73)

2.4 Million
Panelists
in 30 Countries
across 5 Continents!



Raising the Bar *Globally* for Online Research

*As part of the Toluna Group, Common Knowledge now delivers
global sample unrivalled in reliability and integrity.*



Common Knowledge, home of the Your2cents Online Opinion Panel, is now part of the Toluna Group, a global panel and survey technology provider. You know us as a provider of consumer and specialty panels, superior panel management and sampling science, over 1200 target selects and expert survey programming. In addition, we now offer:

- Immediate access to 2.4 million panelists in 30 countries, covering 5 continents
- 16 specialty panels (such as Auto, B2B, Cosmetics, Green Consumers, Food and Drink, etc.)

- A unique web 2.0 community approach that maximizes panelist engagement
- Custom panel and community building and management
- Expanded survey software solutions

As always, our experienced researchers at all levels provide a creative, client-focused approach for every project we do. Respondents can be delivered to your programming or ours.

*To learn more about how we can serve your online needs,
we invite you to visit:*
www.CommonKnowledge.com



Deep Consumer Profiles



B2B Decision Makers



Healthcare Consumers



Technology Professionals




Mobile Survey Solutions



Global Community

Expert Sampling, Programming, and Hosting

COMMON KNOWLEDGE
RESEARCH SERVICES
A COMPANY OF THE **Toluna**
GROUP

THE GOLD STANDARD  FOR ONLINE RESEARCH™

Codes

To search for panels by industry or audience, please use the cross-index section on page 113.

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

Campos Market Research, Inc.

D/B/A Campos Inc
216 Boulevard of the Allies
Pittsburgh, PA 15222-1619
Ph. 412-471-8484 ext. 309
E-mail: info@campos.com
www.campos.com
Proprietary Panel Mgmt.: Yes

Canadian Viewpoint, Inc.

Hillcrest Mall
206-9350 Yonge St., Suite 206
Richmond Hill, ON L4C 5G2
Canada
Ph. 905-770-1770 or 888-770-1770
E-mail: 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
E-mail: sales@carbonview.com
www.carbonview.com
John Beckley
Proprietary Panel Mgmt.: Yes
Panel Titles:
CV Opinions Panel
Size: 100,000 Type: Online

ChildResearch.com

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

Ciao GmbH

Leopoldstrasse 236
80807 Munich
Germany
Ph. 49-89-2555-1600
E-mail: 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

Cint USA

191 Peachtree St., Suite 3300
Atlanta, GA 30303
Ph. 404-946-1821
E-mail: oscar.carlsson@cint.com
www.cint.com/cpx
Panel Titles:
Survey Exchange Panel
Size: 224,000 Type: Online

Clear Seas Research

2401 W. Big Beaver Rd., Suite 700
Troy, MI 48084
Ph. 248-786-1619
E-mail: info@clearseasresearch.com
www.clearseasresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Building Materials Talk
Size: 3,000+ Type: Online

Clear Voice Research, LLC

1675 Larimer St. Suite 640
Denver, CO 80202
Ph. 303-534-3333
E-mail: sales@clearvoicesurveys.com
www.clearvoicesurveys.com

ClickIQ

2001 Killebrew Dr., Suite 114
Bloomington, MN 55425
Ph. 952-224-0810
E-mail: sales@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

**Common Knowledge Research Services**

16200 Dallas Pkwy., Suite 140
Dallas, TX 75248-6897
Ph. 800-710-9147 or 972-732-7323
E-mail: getinfo@commonknowledge.com
www.commonknowledge.com
Steven R. Lavine, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Argentina
Size: 4,472 Type: Online
Australia
Size: 42,854 Type: Online
Austria
Size: 6,101 Type: Online
Belgium
Size: 49,639 Type: Online
Brazil
Size: 30,585 Type: Online
Canada
Size: 25,000 Type: Online
Chile
Size: 1,983 Type: Online
China
Size: 63,214 Type: Online
Czech Republic
Size: 11,739 Type: Online
Denmark
Size: 22,163 Type: Online
Finland
Size: 23,363 Type: Online
France
Size: 355,852 Type: Online
Germany
Size: 167,876 Type: Online
Greece
Size: 9,054 Type: Online
Ireland
Size: 26,169 Type: Online
Italy
Size: 105,963 Type: Online
Japan
Size: 26,041 Type: Online
Mexico
Size: 15,101 Type: Online
Netherlands
Size: 63,769 Type: Online
Norway
Size: 21,230 Type: Online

Peru

Size: 2,149 Type: Online
Poland
Size: 43,043 Type: Online
Portugal
Size: 33,954 Type: Online
Russia
Size: 68,793 Type: Online
Singapore
Size: pending Type: Online
Spain
Size: 146,633 Type: Online
Sweden
Size: 43,102 Type: Online
Switzerland
Size: 5,781 Type: Online
United Kingdom
Size: 503,299 Type: Online
United States
Size: 500,000 Type: Online

Common Knowledge, home of the Your2Cents panel, is now a company of the Toluna Group, delivering global samples of unrivalled reliability and integrity from over 2 million panelists in 30 countries. Our research-only panels offer over 1,200 target selects across consumer, B2B decision makers, health care consumers, technology professions, teens, mobile responders and more. Respondents can be delivered to your programming or ours. We offer the only mobile survey solution to collect data by text, Web or voice. We also offer custom panel and community building and management. Contact us and see why we're the Gold Standard for Online Research!™ (See advertisement on p. 89 and outsert)

comScore SurveySite

90 Sheppard Ave. E., Suite 100
Toronto, ON M2N 3A1
Canada
Ph. 416-642-1002
E-mail: sales@surveysite.com
www.surveysite.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Opinion Square
Permission Research
Relevant Knowledge

Consumer Research Centre Ltd.

1398 West 7th Avenue
Vancouver, BC V6H 3W5
Canada
Ph. 604-714-5900 or 866-455-9311
E-mail: info@consumerresearch.ca
www.consumerresearch.ca
Jessica Gibson
Proprietary Panel Mgmt.: Yes
Panel Titles:
Consumer Research Panel, The
Size: 75,000 Type: Online
PharmaField Research
Size: 100,000 Type: Online

Consumerscan International Integra

1681 Chestnut St., Suite 310
Vancouver, BC V6J 4M6
Canada
Ph. 604-731-2600
E-mail: info@consumerscan.ca
www.consumerscan.ca
Panel Titles:
ConsumerScan
Size: 70,000

Cooper Roberts Research, Inc.
 575 Market St., Suite 2100
 San Francisco, CA 94105
 Ph. 415-442-5890
 E-mail: info@cooper-roberts.com
 www.cooper-roberts.com
 Proprietary Panel Mgmt.: Yes

CPRResearch Group, Inc.
 725 S. Adams Rd.
 Suite 205
 Birmingham, MI 48009
 Ph. 800-336-0159 or 248-540-5330
 E-mail: quotes@cpresearchgroup.com
 www.cpresearchgroup.com
 Richard Miller
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 CP Research Consumer Database
 Size: 150,000+ Type: Online
 CPRResearch Blended Web Panel
 Size: 5,000,000+ Type: Online
 CPRResearch Business Database
 Type: Mail, Telephone, Online

Creative Marketing Research Ltd.
 Pegasus 9, Orion Court
 Great Blakenham
 Ipswich, UK IP6 0LW
 United Kingdom
 Ph. 44-0-1473-832211
 E-mail: 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
 Type: Online

Cross Financial Group
 6940 "O" St., Suite 310
 Lincoln, NE 68510
 Ph. 402-441-3131
 E-mail: kyle@crossfinancial.com
 www.crossfinancial.com
 Kyle Hershberger, Vice President
 Proprietary Panel Mgmt.: Yes

Cross-Tab Marketing Services
 468, Koramangala, 6th Block
 80 Feet Road, Opp. Koramangala Bus Depot
 Bangalore 560 095
 India
 Ph. 91-80-41785800 or 91-80-41785814
 E-mail: panelrequest@cross-tab.com
 www.cross-tab.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Cross-Tab Borderless Access - India B2B Panel
 Size: 90,000 Type: Online
 Cross-Tab Borderless Access - India Consumer Panel
 Size: 75,000 Type: Online

CyberEdge
 407 Martin Luther King Jr. Way
 Oakland, CA 94607
 Ph. 510-419-0800
 E-mail: research@cyberedge.com
 www.cyberedge.com
 Panel Titles:
 VizSim/VR Vendors Panel



Data Development Worldwide
 120 Fifth Ave.
 New York, NY 10011
 Ph. 212-633-1100
 E-mail: clister@datadw.com
 www.datadw.com
 Panel Titles:
 Know More™ Internet Panel
 Size: 8,000,000 Type: Online

DDW's Know More™ Internet Panel is comprised of more than 6.7 million households and 8 million consumers in the United States, Canada and Europe. We support both ad hoc and ongoing tracking studies that require detailed quotas across gender, age, ethnicity and geography. It is a multi-sourced panel, and includes children, teenagers and seniors that can be difficult to reach online. (See advertisement on p. 19)

Data Zone Research & Consulting, Inc.
 1015 Atlantic Blvd. #272
 Atlantic Beach, FL 32233
 Ph. 904-246-7351
 E-mail: robin@datazoneresearch.com
 www.datazoneresearch.com
 Rebecca Hart
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 The Vet Zone.com
 Size: 4000+ Type: Online

Datatelligence Online
 3 Signal Ave.
 Ormond Beach, FL 32174
 Ph. 386-677-5644
 E-mail: panel@datatelligence.com
 www.datatelligence.com
 Panel Titles:
 Datatelligence Cell Phone Panel
 Size: 20,000 Type: Online
 Datatelligence Online
 Size: 420,000 Type: Online
 Datatelligence Online Community Access Panel
 Size: 200,000 Type: Online



Decipher
 5250 N. Palm Ave, Suite 220
 Fresno, CA 93704
 Ph. 800-923-5523
 E-mail: info@decipherinc.com
 www.decipherinc.com
 Proprietary Panel Mgmt.: Yes

Decipher offers complete online panel solutions customized to your objectives, including panel design, recruitment and list maintenance, as well as panel driven surveys, data tabulation and analysis. Targeting known, willing participants, who are easily filtered by your selection criteria, typically decreases response times while increasing completion rates and, ultimately, your confidence in sampling data. (See advertisement on p. 65)

More, For Lots Less

THE
 OTHER,
 SAMPLING
 COMPANY IN
 CONNECTICUT

Online Panels
 Sample Only

since
 1991

Phone & Online
 Consumer Panel
 Business Panel
 Exact Age
 Income
 Gender
 RDD Phone
 Low Incidence
 Children/Babies
 Ethnic
 Specialty Files
 Ailments
 Many More

Multi-Sourced, More Options
 More Responsive
 Dependable, Realistic
 The Better Alternative

**AFFORDABLE
 SAMPLES, INC.™**

Old Greenwich, CT

sales@affordablesamples.com
 www.affordablesamples.com
 800-784-8016

Codes

To search for panels by industry or audience, please use the cross-index section on page 113.

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

**Decision Analyst, Inc.**

Decision Analyst, Inc.
604 Avenue H East
Arlington, TX 76011-3100
Ph. 817-640-6166 or 800-262-5974
E-mail: jthomas@decisionanalyst.com
www.decisionanalyst.com
Jerry W. Thomas, President/CEO
Proprietary Panel Mgmt.: Yes
Panel Titles:
American Consumer Opinion®
Size: 7,000,000 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 Type: Online

Decision Analyst started building its Internet research capabilities and systems in 1996. Since then we have become a global leader in Internet-based research systems by developing secure, scientifically-valid, technologically-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 opposite page)

Decision Insight, Inc.
1000 Walnut, Suite 1500
Kansas City, MO 64106
Ph. 816+-221-0445
E-mail: info@decisioninsight.com
www.decisioninsight.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Teen Insight™
Size: 5,000,000+

Diagnostics Plus, Inc.
1333 S. Allen St.
State College, PA 16801
Ph. 814-238-7936 or 814-234-2344
E-mail: jfong@diagnosticsplus.com
www.diagnosticsplus.com
Panel Titles:
Diagnostics Plus Healthcare Panels
Size: 7,000 Type: Telephone, Online

Dialego AG Market Research Online
Friedrichstrabe 69-71
52070 Aachen
Germany
Ph. 49-241-978-280
E-mail: 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
E-mail: jane.mount@digitalresearch.com
www.digitalresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
DRI Consumer Panel
Size: 197,234 Type: Online

DM2-Decision Maker®
2000 Clearwater Dr.
Oak Brook, IL 60523
Ph. 800-323-4958
E-mail: info@dm2decisionmaker.com
www.dm2decisionmaker.com/expertresearch
Mary N. Miller
Proprietary Panel Mgmt.: Yes
Panel Titles:
Expert DecisionMaker Panels
Type: Online



The Suite Solution - River, Panel, Results.™

DMS
1305 S. State Hwy. 121
Suite 290
Lewisville, TX 75067
Ph. 800-409-6262 or 214-222-6173
E-mail: DMSemail@aol.com
www.dms-research.com
Melanie Courtright, Vice President
Panel Titles:
Opinion Place
Type: Online
SurveySpree
Size: 1,500,000 Type: Online
Tu Opinion Latina (Hispanic Panel)
Size: 60,000 Type: Online

DMS Research: The Suite Solution - River, Panel, Results™. Founded in 1995, DMS Research offers a suite of online sample solutions that includes River and Panel, resulting in unparalleled reach and results. DMS is best known for creating the first and largest online portal for intercepting survey respondents in real time - Opinion Place™. By building the concept of RDD purity into Opinion Place™, this unmatched online "River" provides a truly fresh, scientifically-managed sampling frame as an alternative to common online panels that rely on repeat respondents. Our online panel samples including SurveySpree® for traditional panel needs (with numerous profiles including health conditions, shopping, food and beverage, and leisure activities) and Tu Opinión Latina™ for research among Hispanics of all acculturation levels. For more information, please visit our Web site at www.dms-research.com. (See advertisement on p. 95)

DoctorDirectory.com, Inc.
One Page Avenue, Suite 280
Asheville, NC 28801
Ph. 828-255-0012 or 888-796-4491
E-mail: research@doctordirectory.com
http://clients.doctordirectory.com
Hank Parish, VP Sales
Proprietary Panel Mgmt.: Yes
Panel Titles:
DoctorDirectory Consumer Panel
Size: 800,000 Type: Online
DoctorDirectory Physician Panel
Size: 650,000 Type: Mail, Online

EcoUnit LLC
2310 Homestead Rd., #C1-230
Los Altos, CA 94024
Ph. 650-283-4774
E-mail: kent@ecounit.com
www.ecounit.com
Kent Ragen, CEO
Panel Titles:
EcoUnit Eco-Aware Consumer Panel
Size: 10,000+ Type: Online

Embrain Co., Ltd.
7th Floor, Ilheung Building
126-1 Chungmuro 4GA, Chung-Gu
Seoul 100-014
South Korea
Ph. 82-2-3406-3851
E-mail: webmaster@panel.co.kr
www.embrain.com
James Moon, Senior Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
Embrain Panel
Size: 1.5 million Type: Online

EMI Surveys
3443 Edwards Rd.
Cincinnati, OH 45208
Ph. 513-321-9955
E-mail: sales@emisurveys.com
www.emisurveys.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Online Global B2B
Size: Type: Online
Online Global B2C
Size: Type: Online
Online Global Healthcare
Size: Type: Online

E-Poll Market Research
16133 Ventura Blvd., Suite 905
Encino, CA 91436
Ph. 877-MY-EPOLL or 818-995-4960
E-mail: client@epoll.com
www.epollresearch.com
Mark Cray, Director of Marketing
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
E-mail: drjohn@e-research-global.com
www.e-research-global.com
Thomas E. Johnson, Ph.D.
Panel Titles:
e-Research-Global.com Panel
Size: 110,000 Type: Online

Global Internet Panels Par Excellence

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Codes

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



e-Rewards

MARKET RESEARCH

e-Rewards Market Research
8401 N. Central Expwy., Suite 900, LB38
Dallas, TX 75225
Ph. 888-203-6245

E-mail: ask@e-rewards.com
www.e-rewardsresearch.com

Proprietary Panel Mgmt.: Yes
Panel Titles:

e-Rewards Automotive Online Panel
Type: Online

e-Rewards Business to Business Online Panel
Type: Online

e-Rewards Canada Online Panels
Type: Online

e-Rewards Consumer Ailments Online Panel
Type: Online

e-Rewards France Online Panel
Type: Online

e-Rewards Germany Online Panels
Type: Online

e-Rewards Healthcare Professionals Online Panel
Type: Online

e-Rewards Netherlands Online Panel
Type: Online

e-Rewards U.S. Online Panels
Type: Online

e-Rewards U.Talk.Back Youth Opinion Panel
Type: Online

e-Rewards United Kingdom Online Panels
Type: Online

e-Rewards Inc., headquartered in Dallas, Texas, is the largest "by-invitation-only" online research panel, serving over 700 research firms. With millions of panelists, the e-Rewards opinion panels provide research firms with quality respondents - enabling them to interact with real consumers and business decision makers. e-Rewards employs over 325 professionals in Dallas, London, Los Angeles, New York, San Francisco, Chicago and Seattle. (See advertisement on p. 55)

eSample Solutions

(U.S. & Canada Headquarters)

3850 Fairlight Dr., Suite 63

Saskatoon, SK S7M 5B7

Canada

Ph. 306-979-0984

E-mail: info@esamplesolutions.com

www.esamplesolutions.com

Brad Hogan, Sr. Sample & Panel Consultant

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: 100,0000+ Type: Telephone, Online

eSample International Panel (200+ Countries)

Size: 7,000,000+ Type: Mail, Telephone, Online

eSample IT Professionals

Size: 100,000+ Type: Telephone, Online

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



search.com

Esearch.com, Inc.

32 S. Middleridge Lane

Rolling Hills, CA 90274

Ph. 310-265-4608

E-mail: esearch@esearch.com

www.esearch.com

Proprietary Panel Mgmt.: Yes

Panel Titles:

Esearch Business/IT Panel

Type: Online

Esearch Children/Teens Panel

Type: Online

Esearch Consumer Panel (U.S.)

Type: Online

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

FGI Research

400 Meadowmont Village Circle, Suite 431

Chapel Hill, NC 27517

Ph. 919-929-7759

E-mail: jblunk@fgiresearch.com

www.fgiresearch.com

Heather Woodward

Proprietary Panel Mgmt.: Yes

Panel Titles:

SmartPanel of Consumers

Size: 850,000 Type: Online

SmartPanel of Growing Families

Size: 35,000 Type: Online

Focus Forward

515 Pennsylvania Ave., Suite 110

Fort Washington, PA 19034

Ph. 215-367-4000

E-mail: william@focusfwd.com

www.focusfwd.com

Panel Titles:

Focus Forward Online Panel

Size: 500,000 Type: Online

Focus World International, Inc.

146 Hwy. 34, Suite 100

Holmdel, NJ 07733

Ph. 732-946-0100

E-mail: gary@focusworldint.com

www.focusworldinternational.com

Proprietary Panel Mgmt.: Yes

Panel Titles:

Focus World B-2-B Medical Panels

Size: 612,500 Type: Telephone, Online

Focus World Consumers Nationwide Panel

Size: 1.25 million Type: Telephone, Online

Focus World Ethnic Panel

Size: 810,000 Type: Telephone, Online

G.L.A. Int'l Marketing and Research Consultancy

Shinagawa-ku Kamiosaki 3-9-3

Tokyo 141-0021

Japan

Ph. 81-50-5534-3915

E-mail: inquiry@GlobalLinkAssociates.com

http://en.GlobalLinkAssociates.com

Shino Fukuyama, Managing Director

Proprietary Panel Mgmt.: Yes

Panel Titles:

G.L.A. Int'l Online household panel in Japan

Size: 50,000 Type: Online

G.L.A. Retail flyer/discount coupon monitoring in Japan

Size: 35,000 Type: Online

The Gallup Panel

1001 Gallup Dr.

Omaha, NE 68102

Ph. 402-938-6539

E-mail: Jerry_krueger@gallup.com

www.galluppanel.com

Jerry Krueger

Proprietary Panel Mgmt.: Yes

Panel Titles:

Gallup Panel, The

Size: 50,000 Type: Mail, Telephone, Online

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esearch@esearch.com



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other "rivers"



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many other *pseudo-rivers* do to get their numbers. At DMS, our combination of fresh respondents and a sophisticated series of security "nets" ensures that repeat respondents never taint your online sample. Our river guarantees freshness for your survey.

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call 800.409.6262
email info@dms-research.com

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respondents
since 1995!



Codes

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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
E-mail: info@m-s-g.com
www.genesys-sampling.com
Alan Lambert, Asst. Vice President
Proprietary Panel Mgmt.: Yes

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 Custom Research North America

75 Ninth Ave., 5th Floor
New York, NY 10011
Ph. 212-240-5300
E-mail: info@gfkamerica.com
www.gfkamerica.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
GfK USA Online Panel
Size: 2,000,000 Type: Online

**Globalpark US**

405 Lexington Ave., 26th Floor
New York, NY 10174
Ph. 1-888-299-9422
E-mail: info@globalpark.us
www.globalpark.com
Dan Coates, President
Proprietary Panel Mgmt.: Yes

Globalpark is a leading global provider of survey software for online market research and human resource management. Our Enterprise Feedback Suite, comprises: EFS Survey: A professional high-end solution to data collection on the Internet. EFS Panel: A complete solution to managing proprietary and custom panels. EFS Employee: Create flexible and informative 360-degree employee surveys via Inter-, extra- or intranet. EFS Leadership: An extensive platform for conducting and managing employee surveys with ease. (See advertisement on this page)

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

1100 112th Ave. N.E., Suite 200
Bellevue, WA 98004
Ph. 866-5-ASK GMI or 206-315-9287
E-mail: info@gmi-mr.com
www.gmi-mr.com
Dan Fitzgerald, V.P., Americas
Proprietary Panel Mgmt.: Yes
Panel Titles:
GMI African-American Panel
Size: 103,153 Type: Online
GMI Chronic Illness Patient Panel
Size: 7,524,024 Type: Online
GMI Consumer Panel
Size: 13,000,000 Type: Online
GMI Gamer Panel
Size: 37,705 Type: Online
GMI Hispanic Panel
Size: 60,000 Type: Online
GMI IT Professional Panel
Size: 901,606 Type: Online
GMI Physician Panel
Size: 29,695 Type: Online
GMI Prenatal/New Parent Panel
Size: 89,295 Type: Online
GMI Youth Panel
Size: 324,134 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)



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 3864 Clayton Ave.
 Los Angeles, CA 90027
 Ph. 323-660-2483
 E-mail: gmret1@gmrnet.com
 www.gmrnet.com
 George Grace, President
 Panel Titles:
 GMR Panel
 Size: 65,000 Type: Online

Great Opinions
 350 Fifth Avenue
 New York, NY 10118
 Ph. 212-370-1545
 E-mail: info@greatopinions.com
 www.greatopinions.com
 Proprietary Panel Mgmt.: Yes



Greenfield Online
 21 River Rd.
 Wilton, CT 06897
 Ph. 203-834-8585
 E-mail: solutions@greenfield.com
 www.greenfield.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Greenfield Online Ailment Sufferers Panel
 Type: Online
 Greenfield Online Auto Panel
 Type: Online
 Greenfield Online B2B/IT Panel
 Type: Online
 Greenfield Online Entertainment Panel
 Type: Online
 Greenfield Online Global Panel
 Type: Online
 Greenfield Online Leisure Activities Panel
 Type: Online
 Greenfield Online Moms & Babies Panel
 Type: Online
 Greenfield Online Physicians Panel
 Type: Online
 Greenfield Online Teen Panel
 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 couple this with access to respondents via Real-Time Sampling™ and affiliate partners 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. 60-61)

Hansa/GCR, LLC
 308 S.W. 1st Ave.
 Portland, OR 97204
 Ph. 503-243-5218
 E-mail: info@hansagcr.com
 www.hansagcr.com
 Vineet Sodhani, Director of Marketing
 Panel Titles:
 IT Decision Makers Panel
 Size: 40,000 Type: Online

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 info@gmiglobal.com



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 London Los Angeles Minneapolis Munich Paris
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 Valencia Vancouver, BC Washington, DC

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Type: How members are surveyed
(mail, telephone, online)

Harris Interactive®

Corporate Headquarters
60 Corporate Woods
Rochester, NY 14623
Ph. 877-919-4765 or 585-214-7412
E-mail: info@harrisinteractive.com
www.harrisinteractive.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
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
Harris Poll Online
Type: Online

Hotspex Inc.

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

i.think inc.

2811 McKinney Ave., Suite 350
Dallas, TX 75204
Ph. 214-855-3777
E-mail: bmack@ithinkinc.com
www.ithinkinc.com
Beth Mack, President
Panel Titles:
i.thinker Panel
Size: 1,500,000+ Type: Online

Insight Counts

136 Walton Ferry Rd., Suite 4
Hendersonville, TN 37075
Ph. 615-822-5860
E-mail: 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
Size: Type: Telephone, Online
Consumer Link Ethnographic Research
Size: 10,000 Type: Online
Consumer Link Focus Groups
Size: 10,000
Consumer Link Home Use Tests
Size: 10,000 Type: Telephone, Online
Consumer Link Product Testing Research
Type: Telephone, Online

InsightExpress, LLC

1351 Washington Blvd.
Stamford, CT 06902
Ph. 877-329-1552 or 203-359-4174
E-mail: info@insightexpress.com
www.insightexpress.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
InsightExpress Opinion-Central
Type: Online

Inter@ctive Market Research srl

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

**InterfaceAsia**

Interface In Design (IID) Inc.
21221 S. Western Ave.
Suite #170
Torrance, CA 90501
Ph. 310-212-7555
E-mail: kojima@iid-usa.com
www.interfaceasia.com
Tom Kojima
Proprietary Panel Mgmt.: Yes
Panel Titles:
Interface Asia Consumer
Size: 630,000 in Japan; 445,000 in China; 150,000 in Korea Type: Online
InterfaceAsia B2B / IT
Size: 180,000 in Japan; 70,000 in China; 97,000 in Korea Type: Online
InterfaceAsia Medical (Patients)
Size: 50,000 in Japan; 34,000 in Korea; 34,000 in China Type: Online
InterfaceAsia Medical (Physician)
Size: 142,000 in Japan; 80,000 in China; 15,000 in Korea Type: Online

InterfaceASIA is a provider of market research and online access panel for Asian countries. With extensive experience in various industries and expansive research resources, InterfaceASIA provides the cultural and demographic intelligence you need for a successful product launch in Asia. With proprietary online panels in Japan, China, Korea, Taiwan, Hong Kong, we are able to target specific respondents.
(See advertisement on p. 69)

Intervjubilaget - IMRI AB

Strengbergsgatan 2
871 33 Harnosand
Sweden
Ph. 46-611-34-97-20
E-mail: info@ibimri.se
www.ibimri.se

Ipsos North America

Headquarters
1700 Broadway, 15th Floor
New York, NY 10019
Ph. 212-265-3200
E-mail: 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
European Online Panel
Size: 1,275,000 Type: Online
Ipsos CDN CPC Access Panel
Size: 80,000 Type: Mail, Telephone, Online
Ipsos North America Online Panel
Size: 750,000 Type: Online
Ipsos U.S. HTI Panel
Size: 350,000 Type: Mail, Telephone, Online

**JRA: Global Healthcare Research Services**

J. Reckner Associates, Inc.
587 Bethlehem Pike, Suite 800
Montgomeryville, PA 18936-9742
Ph. 215-822-6220
E-mail: GHRS03@reckner.com
www.reckner.com
Susan Philippe
Proprietary Panel Mgmt.: Yes
Panel Titles:
JRA Healthcare Professionals Panel
Size: 200,000+ Type: Telephone, Online
JRA Physicians Panel
Size: 320,000+ Type: Telephone, Online

320,000+ U.S. physician and health care professional panel. Comprehensive Web survey capabilities with 12 full-time programmers. Global field management, execution and data processing for projects with medical professionals and consumers with ailments via Web, in-person or telephone. Project managers work as your "thinking partner" to ensure the success of your study. Quantitative expertise includes complex logic programming and multiple-language surveys for domestic and international projects. Sample-only and proprietary panel solutions available. Client Web interface gives 24/7 access to real-time data.
(See advertisement on p. 17)

**KL Communications, Inc.**

46 English Plaza, Suite 6
Red Bank, NJ 07701
Ph. 732-224-9991
E-mail: info@klcom.com
www.klcommunications.com
Kevin Lonnie, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Consumer Directions
Size: 15,000 Type: Online

KL Communications is on the forefront of online research and helps some of the world's leading companies facilitate an ongoing dialogue with their customers in new and innovative ways. KL builds and manages communities of engaged consumers that provide you immediate and actionable insights. Your community is a direct line to your customers - real people communicating in real terms.
(See advertisement on p. 57)



We cure online research anxiety.

Decisions are unavoidable. Anxiety is optional.

It's not a secret anymore—many of those who buy and rely on Internet research do not fully trust their data. Online panels suffer from fundamental research flaws that are suspected but rarely investigated. Why live with the anxiety?

Knowledge Networks gives you access to the only truly representative online panel in the industry; its results are the product of sound, proven science. To make best use of this unique resource, we also have collected some of the smartest minds in the business—experts who will make your research pointed, efficient, and practical.

Put your worries aside and visit us at www.knowledgenetworks.com or, write to: know1@knowledgenetworks.com

Codes

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

**Knowledge Networks**

440 Park Ave. South
6th Floor
New York, NY 10016
Ph. 646-742-5300
E-mail: info@knowledgegenetworks.com
www.knowledgegenetworks.com
Martin Zagorsek, EVP, Client Service
Proprietary Panel Mgmt.: Yes
Panel Titles:
KnowledgePanel®
Size: 50,000 Type: Online
KnowledgePanel Latino™
Size: 5,500 Type: Online
National Shopper Lab
Size: 12,000,000

Knowledge Networks solves complex problems, providing extraordinary quality and service to business leaders. KN excels in study design, analytics and custom panel creation and delivers affordable, statistically-valid online research through KnowledgePanel® - the only available probability-selected, nationally-representative Internet panel. Our KnowledgePanel Latino™ is the first online panel that enables researchers to conduct statistically-balanced Web-based surveys on the full U.S. Latino population. (See advertisement on p. 99)

Lightspeed Research

180 Mt. Airy Rd., Suite 100
Basking Ridge, NJ 07920
Ph. 908-630-0542
E-mail: info@lightspeedresearch.com
www.lightspeedresearch.com
Lynette McCarthy, Marketing Director
Proprietary Panel Mgmt.: Yes
Panel Titles:
Lightspeed Mobile Panel
Type: Online
Lightspeed Automotive Panel
Type: Online
Lightspeed Beauty, Personal Care, Grooming Panel
Type: Online
Lightspeed Beverages Panel
Type: Online
Lightspeed Boomers and Matures Panel
Type: Online
Lightspeed Consumer Panel
Type: Online
Lightspeed ELITEOpinion Panel (B2B)
Type: Online
Lightspeed Financial Panel
Type: Online
Lightspeed Health and Wellness Panel
Type: Online
Lightspeed Hispanic Panel
Type: Online
Lightspeed Household/Family Panel
Type: Online
Lightspeed Media Panel
Type: Online
Lightspeed Sports and Hobbies Panel
Type: Online
Lightspeed Travel and Leisure Panel
Type: Online



Luth Research
1365 Fourth Ave.
San Diego, CA 92101
Ph. 619-234-5884
E-mail: mdevaney@luthresearch.com
www.luthresearch.com
Matt DeVaney
Proprietary Panel Mgmt.: Yes
Panel Titles:
SurveySavvy
Size: 3,000,000+ Type: Online

For 30 years, Luth Research has been offering clients around the globe the kind of forward-thinking intelligence that moves their businesses ahead. From its innovative online community, SurveySavvy™, to a creative combination of research methods by an experienced team, clients count on Luth Research for excellence in market research. (See advertisement on opposite page)



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Dubai Internet City
Dubai
United Arab Emirates
Ph. 971-4391-3640 (Dubai)
E-mail: info@maktoob-research.com
www.maktoob-research.com
Tamara Deprez, Research Director
Proprietary Panel Mgmt.: Yes
Panel Titles:
Maktoob Research Panel
Size: 2,000,000 Type: Online

Maktoob Research offers an online panel covering two million Arabs in the Middle East and North Africa. Maktoob Research can target its panel members by demographics and key behavioral patterns. Maktoob Research not only provides project support via survey programming, translations and hosting, but also the complete research package, including consultancy. During an ongoing research project, research data is available 24/7 through an online tool for real-time analysis. (See advertisement on p. 63)

Market Decisions Corporation

8959 S.W. Barbur Blvd., Suite 204
Portland, OR 97219
Ph. 800-344-8725
E-mail: info@mdcresearch.com
www.mdcresearch.com
Proprietary Panel Mgmt.: Yes

Market Insight, Inc.

112 W. Foster Ave., Suite 202-C
State College, PA 16801
Ph. 814-231-2140 or 800-297-7710
E-mail: mhutchison@mkt-insight.com
www.mkt-insight.com
Marlene Hutchison, Managing Director
Proprietary Panel Mgmt.: Yes
Panel Titles:
Health Insights™
Size: 160,000 Type: Mail, Telephone, Online

Market Reader Pro

5741 Memorial Rd.
Germansville, PA 18053
Ph. 610-366-7918
E-mail: mooneagle@marketreaderpro.com
www.marketreaderpro.com
MoonEagle Arndt, Owner
Proprietary Panel Mgmt.: Yes
Panel Titles:
Market Reader Pro™ Consumers (worldwide, mostly US)
Size: 160,000 Type: Online

Marketing Solutions Corporation

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

**Marketing Systems Group**

565 Virginia Dr.
Fort Washington, PA 19034-2706
Ph. 800-336-7674 or 215-653-7100
E-mail: info@m-s-g.com
www.m-s-g.com
Proprietary Panel Mgmt.: Yes

Through its ARCS® IVR Systems division, Marketing Systems Group provides technology to automate recruiting, scheduling and collection of data via Web or IVR from proprietary panelists for sensory evaluations, focus groups and central location tests. MSG's GENESYS Sampling Systems division has assembled a number of "best-in-class" approaches for various targeting variables, providing a multi-sourced approach tailored to particular projects. (See advertisement on p. 71)

MarketTools, Inc.

150 Spear St., Suite 600
San Francisco, CA 94105
Ph. 415-957-2200 or 866-499-3750
E-mail: info@markettools.com
www.markettools.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
ZoomPanel
Size: 3,000,000+ Type: Mail, Online

MarketVision Research®

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

Mars Research

6365 N.W. 6th Way, Suite 150
Ft. Lauderdale, FL 33309
Ph. 954-771-7725
E-mail: 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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The vSavvy™ Quality Program is coupled with our SavvyAccess™. SavvyAccess™ is Luth Research's proprietary technology for blending multiple source samples. This technology gives you the confidence to satisfy your client's inquiries regarding quality.

Just because twins look cute in a photo doesn't mean they belong in your survey.



Visit www.luthresearch.com or call 800.465.5884

Codes

To search for panels by industry or audience, please use the cross-index section on page 113.

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
E-mail: g.diederich@mediatransfer.de
www.b2b.mediatransfer.com
Dr. Thomas Rodenhause, 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
E-mail: bizdev@medimix.net
www.medimix.net
Panel Titles:
Healthcare Professionals Worldwide
Size: 700,000 Type: Online

**Mindfield Online Internet Panels**

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

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

(See advertisement on opposite page and p. 59)

The Minter Group

Suite 26/12-14 Waratah Street
Mona Vale
Mona Vale, NSW 02103
Australia
Ph. 61-2-9979-5277
E-mail: gminter@minter.com.au
www.minter.com.au
Panel Titles:
Consumer
Size: 7,500 Type: Online
Health Care
Size: 1,000 Type: Telephone, Online

mo'web GmbH

Mertensgasse 12
40213 Dusseldorf
Germany
Ph. 49-211-8-28-28-00
E-mail: h.hoeckel@mo-web.net
www.mo-web.net
Panel Titles:
mo'web GmbH B2B Panel
Size: 200,000 Type: Online
mo'web GmbH Consumer Panel
Size: 1,000,000 Type: Online
mo'web GmbH IT Panel
Size: 200,000 Type: Online
mo'web GmbH Medical Panel
Size: 50,000 Type: Online

Murphy Marketing Research/TrendTown

161 Green Bay Road
Thiensville, WI 53092
Ph. 262-236-0194
E-mail: amurphy@murphymarketing.com
www.murphymarketing.com
Panel Titles:
Sparks® Creative Consumers

NAHB Research Center

400 Prince George's Blvd.
Upper Marlboro, MD 20774
Ph. 800-638-8556 or 301-249-4000
E-mail: 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 Field & Focus, Inc.

205 Newbury St., Suite 301
Framingham, MA 01701
Ph. 508-370-7788
E-mail: info@nff-inc.com
www.nff-inc.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
National Field & Focus Consumer Panel
Size: 8,500 Type: Online

National Research Network - Chicago

110 N. Wacker Dr.
Chicago, IL 60606
Ph. 312-960-5158
E-mail: rick.kronenburger@ggp.com
www.nationalresearchnetwork.com
Panel Titles:
NRN Opinion Club
Size: 130,000

NJ Institute for Successful Aging Research Call Center

Univ Medicine & Dentistry of NJ, Sch of Osteopathic Medicine
42 E. Laurel Rd., UDP Suite 2300
Stratford, NJ 08084
Ph. 877-NJ-AGING or 877-652-4464
E-mail: BrillJe@umdnj.edu
www.njisa.umdj.edu
Jonathan Brill, Ph.D.

Nextplora S.p.a.

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

NJW Research

42 Catharine St.
Poughkeepsie, NY 12601
Ph. 845-471-7445
E-mail: gerry.w@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
E-mail: shane@nooro.com
www.nooro.com
Shane McChesney, President
Proprietary Panel Mgmt.: Yes

NovaTest

104, Rue Amelot
75011 Paris
France
Ph. 33-1-43-55-29-29
E-mail: vtteradot@novatest.fr
www.novatest.fr
Panel Titles:
Global Test Market
Size: 1,400,000 Type: Online
Pharmacare
Size: 2,000

The NPD Group, Inc.

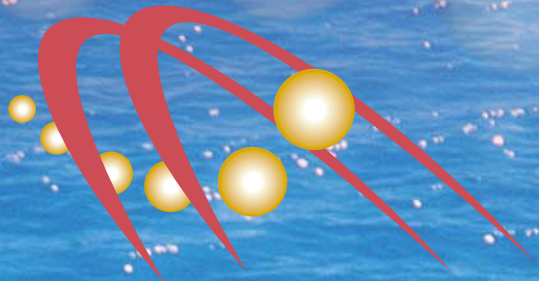
900 West Shore Rd.
Port Washington, NY 11050
Ph. 516-625-0700
E-mail: info@npd.com
www.npd.com
Panel Titles:
NPD Online Research Panel
Size: 2,500,000 Type: Online

**Olson Research Group, Inc.**

North American Technology Center
48 Swan Way, Suite 102
Warminster, PA 18974
Ph. 267-487-5500
E-mail: info@olsonresearchgroup.com
www.olsonresearchgroup.com
Matt Hancock
Proprietary Panel Mgmt.: Yes

Choose Olson Research Group Inc. for full-service quantitative or qualitative research, online research or data collection. Specializing in pharmaceutical and health care research, we handle all steps from study design to analysis and interpretation of results. Our online research capabilities incorporate the latest technological advances, including online conjoint analysis. All research is conducted by professional researchers, highly-trained moderators, and experts in the appropriate discipline.
(See advertisement on p. 15)

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mindfieldonline.com jmace@mcmillionresearch.com

Codes

To search for panels by industry or audience, please use the cross-index section on page 113.

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

On-Line Communications, Inc.

401 S.E. Dewey Suite 500
Bartlesville, OK 74003
Ph. 800-765-3200 or 918-338-2000
E-mail: askus@on-linecom.com
www.on-linecom.com
Proprietary Panel Mgmt.: Yes

**Opinion Search Inc.**

160 Elgin Street, Suite 1800
Ottawa, ON K2P 2P7
Canada
Ph. 800-363-4229 or 613-230-9109
E-mail: info@opinionsearch.com
www.opinionsearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Opinion Search Consumer Panel
Type: Online

Opinion Search offers a Canadian proprietary panel, complete with online survey programming, hosting, coding and cross-tabulation. Our Consumer Panel is extensively profiled, with national coverage and includes variables relevant to B2B research projects. Our Propensity Weighting technique ensures data is representative of the general population. Opinion Search also taps into a global network of international panels in over 100 countries. (See advertisement on inside back cover)

Osterman Research, Inc.

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

Outsource Research Consulting

120 Hawks Peak Rd.
Suite 100
Aptos, CA 95003
Ph. 877-672-8100
E-mail: contactus@orconsulting.com
www.orconsulting.com
Nico Peruzzi, Ph.D., Partner
Proprietary Panel Mgmt.: Yes

Peanut Labs

114 Sansome St., Suite 920
San Francisco, CA 94104
Ph. 415-659-8266 x810
E-mail: sean@peanutlabs.com
www.peanutlabs.com
Panel Titles:
Canadian Gen-Y Panel (13-29 Years Old)
Size: 193,490 Type: Online
IT Decision Makers
Size: 150,000 Type: Online
UK Gen-Y Panel (13-29 Years Old)
Size: 139,110 Type: Online
US Gen X-Panel (30-55 Years Old)
Size: 1,867,200 Type: Online
US Gen-Y Panel (13-29 years Old)
Size: 1,310,010 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
E-mail: pearson@pearson-research.com
www.pearson-research.com
Manuel Barberena, CEO
Proprietary Panel Mgmt.: Yes
Panel Titles:
Pearson Mexican Consumer Panel
Size: 40,000 Type: Online

The People Panel

(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:
People Panel - Consumer Panel, The
Size: 100,000 Type: Mail, Telephone,

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- B2B & B2C Panel
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www.pulse-group.com

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Persuadable Research Corporation

Corporate Woods 6
8900 Indian Creek Parkway, Suite 220
Overland Park, KS 66210
Ph. 913-385-1700 x302
E-mail: cmiller@persuadables.com
www.persuadables.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Persuadable Research Panel
Size: 1,000,000 Type: Online

**Physicians Consulting Network**

111 Howard Blvd., Suite 100
Mt. Arlington, NJ 07856-1315
Ph. 800-241-2953
E-mail: info@pcnonline.org
www.pcnonline.org
Jim Vielee
Proprietary Panel Mgmt.: Yes
Panel Titles:
Physicians Consulting Network
Size: 83,500 Type: Mail, Online

The Physicians Consulting Network (PCN) is the most comprehensive source of physicians and other health care professionals available for your custom research needs. All members are verified to ensure accuracy. All PCN services - data collection, programming and hosting, tabulation and coding - are handled in-house. Personal implementation of these services gives PCN complete control over your project.

(See advertisement on this page)

Polimetrix

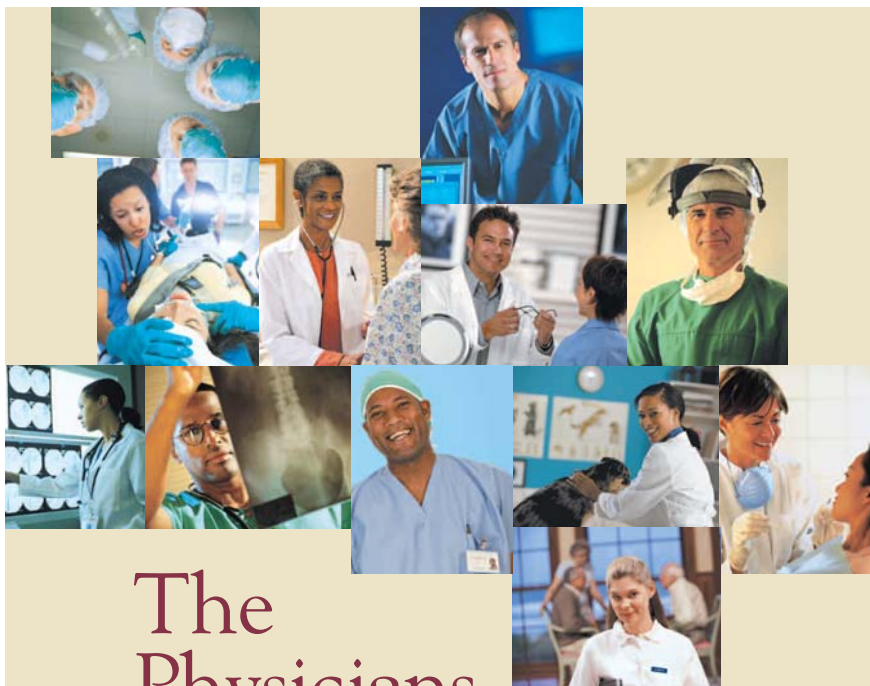
285 Hamilton Ave. Suite 200
Palo Alto, CA 94301-1715
Ph. 800-988-6076 or 650-462-8000
E-mail: sales@polimetrix.com
www.polimetrix.com
Panel Titles:
PollingPoint
Type: Online

Precision Research Inc.

5681 W. Beverly Lane
Glendale, AZ 85306-9801
Ph. 602-997-9711
E-mail: jmuller@precisionresearchinc.com
www.precisionresearchinc.com
John L. Muller, President/CEO
Proprietary Panel Mgmt.: Yes
Panel Titles:
Precision Research Custom Panels
Size: 500,000+ Type: Mail, Telephone, Online

Profile Marketing Research, Inc.

4020 S. 57th Ave., Suite 101
Lake Worth, FL 33463
Ph. 561-965-8300
E-mail: profile@profile-mktg-res.com
www.profile-mktg-res.com
Judy Hoffman



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To learn more about the distinct advantages of PCN for your research needs, contact Jim Vielee or Tom Simpson at 800.241.2953.

111 Howard Boulevard
Mt. Arlington, NJ 07856

www.pcnonline.org



Codes

To search for panels by industry or audience, please use the cross-index section on page 113.

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

**Pulse Group**

B3A-8 Megan Avenue 1
189 Jalan Tun Razak
50400 Kuala Lumpur
Malaysia
Ph. 603-2167-6666
E-mail: kl@pulse-group.com
www.pulse-group.com
Bob Chua, CEO
Proprietary Panel Mgmt.: Yes
Panel Titles:
www.planet-pulse.com
Size: 2,000,000 Type: Telephone, Online

The Pulse Group is a first-class Research Process Outsourcing (RPO) company, built exclusively to serve the market intelligence industry globally. Its products and services include Planet Pulse - an online community of survey respondents throughout Asia-Pacific and the Middle East, online data collection, survey programming, data processing and analysis, professional MR translations, qualitative and focus group. Planet Pulse is Asia's premier online panel with panelists spanning across 20 countries throughout Asia-Pacific and the Middle East. Its panelist are extensively profiled as both a B2C as well as B2B panel. All panels are recruited in native languages and double-opt in through its recruitment portal www.planet-pulse.com. (See advertisement on p. 104)

QFACT Marketing Research, LLC.

9908 Carver Rd.
Cincinnati, OH 45242
Ph. 513-891-2271
E-mail: info@qfact.com
www.qfact.com
Kristen Monroe
Proprietary Panel Mgmt.: Yes

Qualified Opinions

P.O. Box 2065
Moorabbin, VIC 03189
Australia
Ph. 61 3 9553 6355
E-mail: corpsales@qualifiedopinions.com
www.qualifiedopinions.com
Panel Titles:
Qualified Opinion Panels
Type: Online

**ReRez**

18333 Preston Rd., Suite 425 MB #7
Dallas, TX 75252
Ph. 214-239-3939
E-mail: 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

ReRez is a full-service market research firm, offering a multi-panel solution. We represent several of the largest online panel vendors; a combined panel of more than 22+ million individuals in over 53 countries, and are methodology and online panel specialists. Due to the size of our panel and the fact it is profiled by over 500 segmentation variables, we can assist clients in B2B, consumer, health care (physicians and consumers), IT, international, and Hispanic studies. We specialize in Internet surveys, online panel, virtual focus groups and IVR. programming, online real-time reporting available or panel only. Fast turnaround, flexible pricing and accountability to do what we say we are going to do.
(See advertisement on opposite page)

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Suite 1603
New York, NY 10017
Ph. 212-984-0645
E-mail: quote@researchnow-usa.com
www.researchnow-usa.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Research Now Argentina Online Panel
Size: 20,000 Type: Online
Research Now Australian Online Panel
Size: 145,000 Type: Online
Research Now Austrian Online Panel
Size: 20,000 Type: Online
Research Now Belgium Online Panel
Size: 24,200 Type: Online
Research Now Brazil Online Panel
Size: 10,000 Type: Online
Research Now Canada Online Panel
Size: 401,000 Type: Online
Research Now Chile Online Panel
Size: 17,100 Type: Online
Research Now Czech Online Panel
Size: 19,700 Type: Online
Research Now Danish Online Panel
Size: 11,000 Type: Online
Research Now Dutch Online Panel
Size: 27,900 Type: Online
Research Now Finnish Online Panel
Size: 13,400 Type: Online
Research Now French Online Panel
Size: 136,300 Type: Online
Research Now German Online Panel
Size: 140,000 Type: Online
Research Now Greek Online Panel
Size: 7,000 Type: Online
Research Now Hungarian Online Panel
Size: 8,000 Type: Online
Research Now India Online Panel
Size: 41,900 Type: Online
Research Now Irish Online Panel
Size: 38,800 Type: Online
Research Now Italian Online Panel

Size: 71,500 Type: Online
Research Now Malaysia Online Panel
Size: 6,600 Type: Online
Research Now Mexico Online Panel
Size: 21,500 Type: Online
Research Now New Zealand Online Panel
Size: 28,600 Type: Online
Research Now Norwegian Online Panel
Size: 14,700 Type: Online
Research Now Polish Online Panel
Size: 19,700 Type: Online
Research Now Portuguese Online Panel
Size: 12,600 Type: Online
Research Now Russian Online Panel
Size: 39,700 Type: Online
Research Now Singapore Online Panel
Size: 9,700 Type: Online
Research Now Spanish Online Panel
Size: 68,900 Type: Online
Research Now Swedish Online Panel
Size: 23,000 Type: Online
Research Now Switzerland Online Panel
Size: 15,900 Type: Online
Research Now UK Online Panel
Size: 329,300 Type: Online
Research Now USA Online Panel
Size: 569,500 Type: Online

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Research Results, Inc.

805 Main St.
Fitchburg, MA 01420
Ph. 978-345-5510
E-mail: info@researchresults.com
www.researchresults.com
Robert Favini
Proprietary Panel Mgmt.: Yes

ResearchByNet

1220 Sheppard Ave. E., #100
Toronto, ON M2K 2S5
Canada
Ph. 800-461-3924 or 416-493-6111
E-mail: info@researchbynet.com
www.researchbynet.com
Carrie Moyer, Director of Online Research
Proprietary Panel Mgmt.: Yes
Panel Titles:
Canadian Consumer Panel
Size: 365,000 Type: Online
US Financial Decision Makers
Size: 365,000 Type: Online

Resolution Research & Marketing, Inc.®

625 E. 16th Ave., Suite 202
Denver, CO 80203
Ph. 800-800-0905
E-mail: info@re-search.com
www.ResolutionResearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Resolution Research College
Type: Telephone, Online
Resolution Research Consumers
Type: Telephone, Online
Resolution Research IT/B2B
Type: Telephone, Online
Resolution Research Medical
Type: Telephone, Online

Resonance Insights

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

Resource Systems Group, Inc.

55 Railroad Row
White River Junction, VT 05001
Ph. 802-295-4999
E-mail: 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
E-mail: fred@restaurantinsights.com
www.restaurantinsights.com
Fred Efir
Panel Titles:
RestaurantInsights.com Consumer Panel
Size: 3,000,000



RICCA GROUP
MEDICAL MARKET RESEARCH

Ricca Group, Inc.

103 E. Pennsylvania Blvd.
Feasterville, PA 19053
Ph. 866-963-3000
E-mail: info@riccagroup.com
www.riccagroup.com
Panel Titles:
Ricca Group Allied Health Professionals
Type: Online
Ricca Group Physicians
Type: Online

Ricca Group is a medical market research field agency specializing in conducting Internet and telephone surveys with physicians and allied health professionals. We take great pride in having our name backed by over 25 years of experience in medical data collection. We serve fellow full-service research firms with the full range of survey-related services, ranging from programming and hosting to recruiting, data processing and incentive management. Each service can be employed individually or packaged together.

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1-Shivaji Enclave Main Road
Near Raja Garden
New Delhi 110027
India
Ph. 91-11-25461415 or 91-98-29217654
E-mail: info@rnbresearch.com
www.rnbresearch.com
Pramod Q. Kumar, Bus. Dev. Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
RNB Research B2B Panel
Size: 58,739 Type: Online
RNB Research Consumer Panel
Size: 76,368 Type: Online
RNB Research Physicians Panel
Size: 35,653 Type: Online

RONIN Focus

Prince Consort House
27-29 Albert Embankment
London SE1 7TJ
United Kingdom
Ph. 44-20-7091-1400
E-mail: rkg@ronin.com
www.ronin.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

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Codes

To search for panels by industry or audience, please use the cross-index section on page 113.

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

Sample Czar, Inc.

1850 Industrial St., Suite 514
Los Angeles, CA 90021
Ph. 323-325-9465
E-mail: 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

THE SAMPLE NETWORK

The Sample Network

100 Springdale Rd., A3 #253
Cherry Hill, NJ 08003
Ph. 888-572-3255
E-mail: quotes@thesamplenetwork.com
www.thesamplenetwork.com
Tami Brewer
Proprietary Panel Mgmt.: Yes
Panel Titles:
TSN B2B Panel
Type: Online
TSN Consumer Panel
Type: Online
TSN Ethnic Panel
Type: Online
TSN Healthcare Panel
Type: Online
TSN Teen Panel
Type: Online

The Sample Network offers online sampling and custom panel building solutions to clients desiring high quality data, great prices and unparalleled service. Our global reach extends beyond B2B, B2C, teens, and ethnicities. Plus, our proprietary technology blends samples seamlessly while eliminating duplicates and reducing your stress. Let us plan your next project!
(See advertisement on opposite page)

Shifrin-Hayworth

20300 Civic Center Dr., Suite 207
Southfield, MI 48076
Ph. 248-223-0020 or 800-559-5954
E-mail: research@shifrin-hayworth.com
www.shifrin-hayworth.com
Mark Shifrin, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
National Database - USA
Size: 470,000 Type: Mail, Telephone, Online

Signet Research, Inc.

613 Anderson Ave.
Cliffside Park, NJ 07010
Ph. 201-945-6903 or 201-945-6904
E-mail: joanna@signetresearch.com
www.signetresearch.com
Joanna Zanolopoulos, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Readers Panels - Publication Specific-Customised

Southern Solutions

10608 Flickenger Lane, Suite 102
Knoxville, TN 37922
Ph. 865-392-5047 or 866-764-7342
E-mail: jones@southernolutionstn.com
www.southernolutionstn.com
Jenny Jones
Proprietary Panel Mgmt.: Yes
Panel Titles:
Southern Solutions Baby Boomer
Type: Online
Southern Solutions Fast Food
Type: Online
Southern Solutions General Consumers
Type: Online
Southern Solutions Generation X
Type: Online
Southern Solutions Generation Y
Type: Online
Southern Solutions Insurance
Type: Online
Southern Solutions Pet Owners
Type: Online
Southern Solutions Seniors
Type: Online
Southern Solutions Tweens
Type: Online

Specpan

6640 Intech Blvd., Suite 100
Indianapolis, IN 46278
Ph. 866-SPECPAN
E-mail: sales@specpan.com
www.specpan.com
Panel Titles:
Building & Construction Industry Professionals
Size: 25,000 Type: Online

SpectraCom, Inc.

131 W. Seeboth St.
Milwaukee, WI 53204-1445
Ph. 414-272-7742
E-mail: sally.schmidt@spectracom.com
www.spectracomresearch.com
Sally Schmidt, Research Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
Kidscom Club
Size: 800,000 Type: Online
SpectraCom Research Panel
Size: 25,000 Type: Online

Spectrum Discovery Center

554 Central Ave.
New Providence, NJ 07974
Ph. 908-376-7050
E-mail: mrudolph@sensorspectrum.com
www.spectrumdiscoverycenter.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Spectrum Discovery Center Panel
Type: Online

Sports Marketing Surveys Ltd.

The Courtyard
Wisle, Surrey GU23 6QL
United Kingdom
Ph. 44-1932-350600
E-mail: 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
E-mail: dlevy@strategicdirectionsgroup.com
www.strategicdirectionsgroup.com
Doran J. Levy, Ph.D.
Panel Titles:
Boomers & Their Elders
Size: 25,000 Type: Online



SURVEY SAMPLING
INTERNATIONAL

Survey Sampling International

Global HQ
6 Research Drive
Shelton, CT 06484
Ph. 203-567-7200
E-mail: info@surveysampling.com
www.surveysampling.com
Christopher DeAngelis
Proprietary Panel Mgmt.: Yes
Panel Titles:
Surveyspot.com (USA)
Size: 3,800,000 Type: Online
www.Asiktorget.com (Sweden)
Type: Online
www.Meinungswelt.at (Austria)
Type: Online
www.Meinungswelt.com (Germany)
Type: Online
www.Meinungswelt.com (Switzerland)
Type: Online
www.Meningstorg.no (Norway)
Type: Online
www.Mielipidemaailma.com (Finland)
Type: Online
www.Mondodiopione.it (Italy)
Type: Online
www.Opinieland.be (Belgium)
Type: Online
www.Opinieland.nl (Netherlands)
Type: Online
www.Opinionsland.com (Denmark)
Type: Online
www.Opinionword.com.au (Australia)
Type: Online
www.Opinionworld.cn (China)
Type: Online
www.Opinionworld.co.uk (UK)
Type: Online
www.Opinionworld.com (Ireland)
Type: Online
www.Opinionworld.hk (Hong Kong)
Type: Online
www.Opinionworld.tw (Taiwan)
Type: Online
www.Opinionworld-Singapore.com (Singapore)
Type: Online
www.Opiolandia.com (Spain)
Type: Online
www.Placedesopinions.com (France)
Type: Online
www.Surveyspot.com (Canada)
Type: Online
www.Swiatopinii.pl (Poland)
Type: Online

SSI is the premier global provider of sampling solutions for survey research, offering access to more than 6 million consumer and business-to-business research respondents in 54 countries via Internet, telephone and mobile. Additional services include custom profiling, survey programming and hosting, data processing, sampling consulting and survey optimization. SSI serves more than 1,800 marketing research clients, including nearly three-quarters of the top researchers worldwide. Founded in 1977, SSI has offices in 15 countries worldwide with an international staff of 400 people representing 50 countries and 36 languages.
(See advertisement on p. 111)

DEVILISHLY FAST

{AS IN "HOW THE HELL DID THEY DO THAT SO QUICKLY?"}



Turning around your online sampling project from a quote to live results all in the same day shouldn't feel like dealing with the devil. Our projects start within hours, so you're up and sampling faster, getting all that red-hot speed-to-market you crave — at a price that won't leave you feeling burned. To see what it's all about visit us on the web or call our (good) people now at: 1-888-572-3255

**THE SAMPLE
NETWORK**

theSampleNetwork.com

Codes

To search for panels by industry or audience, please use the cross-index section on page 113.

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

Survey.com

1245 S. Winchester Blvd., Suite 200
San Jose, CA 95128
Ph. 408-850-1227
E-mail: 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+ Type:
Consumer ePanel
Type: Online
IT Decision Maker ePanel
Size: 50,000+ Type: Online
Youth ePanel
Size: 20,000,000+ Type: Online

**SurveyU**

405 Lexington Ave., 26th Floor
New York, NY 10174
Ph. 888-292-8855
E-mail: info@surveyu.com
www.surveyu.com
Panel Titles:
SurveyU Panel
Size: 50,000 Type: Online

SurveyU.com provides custom research, syndicated reports and online sample to help reveal the attitudes and behaviors of college students nationwide. Additionally, SurveyU offers monthly online omnibus and mobile omnibus vehicles. The mobile omnibus is conducted via SMS and mobile Web to gather instant opinions from this active population. The SurveyU panel has been meticulously constructed on a campus-by-campus basis using localized campaigns, matching panelists against academic enrollment statistics. This bottom-up methodology enables levels of accuracy and projectability on campus, state, regional and national levels that was previously impractical or impossible - either online or offline.
(See advertisement on p. 96)

Synovate

222 South Riverside Plaza
Chicago, IL 60606
Ph. 312-526-4000
E-mail: jennifer.chhatlani@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: 78,000+ Type: Mail, Telephone, Online
Synovate Global Opinion Panels - Western Europe
Size: 250,000+ Type: Mail, Telephone, Online
Synovate Global Opinion Panels-North America
Size: 1,800,000+ Type: Mail, Telephone, Online
Synovate Health Conditions Panel
Size: 250,000+ Type: Mail, Telephone, Online
Synovate Technology Panel
Size: 250,000+ Type: Mail, Telephone, Online
Synovate Travel & Leisure Panel
Size: 250,000+ Type: Mail, Telephone, Online
Synovate Voice of the Hispanic Family
Size: 11,000+ Type: Mail, Telephone

Synovate - Perth

Level 1, 1292 Hay Street
West Perth, WA 6005
Australia
Ph. 61-8-9321-5415
www.synovate.com
Panel Titles:
The Buzz

Synovate New Zealand-Auckland

P.O. Box 82081, Level 1, 26 Aviemore Drive
Highland Park
Auckland 02010
New Zealand
Ph. 64-9-538-0500
E-mail: newzealand@synovate.com
www.synovate.com/newzealand
Panel Titles:
Healthtracker
Size: 500 Type: Online

Taylor Nelson SOFRES plc.

Westgate
London W5 1UA
United Kingdom
Ph. 44-20-8967-0007
E-mail: 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
E-mail: 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
E-mail: tcogan@techtargt.com
www.techtargt.com
Toby Cogan, Market Research Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
TechTarget IT Research Panel
Size: 500,000 Type: Online

Think Virtual Fieldwork

205 Worth Ave., Suite 201
Palm Beach, FL 33480
Ph. 212-699-1901
E-mail: ray@thinkvirtualfieldwork.com
www.thinkvirtualfieldwork.com
Proprietary Panel Mgmt.: Yes

TNS

100 Park Ave., 4th Floor
New York, NY 10017
Ph. 212-991-6000
E-mail: larry.levin@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, Online

TNS Hong Kong

12A/F Sun Hung Kai Centre
30 Harbour Rd.
Wan Chai
Hong Kong
Ph. 852-2116-8888
E-mail: office.hk@tns-global.com
www.tns-global.com
Andrew Davison
Proprietary Panel Mgmt.: Yes
Panel Titles:
6th dimension™ Access Panels Australia
Size: 539,000 Type: Online
6th dimension™ Access Panels China
Size: 110,000 Type: Online
6th dimension™ Access Panels Hong Kong
Size: 40,000 Type: Online
6th dimension™ Access Panels Japan
Size: 50,000 Type: Online
6th dimension™ Access Panels Korea
Size: 76,000 Type: Online
6th dimension™ Access Panels Malaysia
Size: 20,000 Type: Online
6th dimension™ Access Panels New Zealand
Size: 132,000 Type: Online
6th dimension™ Access Panels Saudi Arabia
Size: 11,000 Type: Online
6th dimension™ Access Panels Singapore
Size: 21,000 Type: Online
6th dimension™ Access Panels Taiwan
Size: 200,000 Type: Online
6th dimension™ Access Panels Thailand
Size: 22,000 Type: Online
6th dimension™ Access Panels United Arab Emirates
Size: 10,000 Type: Online

Toluna

419 Lafayette, 2nd Floor
New York, NY 10003
Ph. 646-723-4595
E-mail: info@toluna.com
www.toluna-group.com
Alicia Lerardi, Director of Sales
Panel Titles:
ToLuna Panel
Size: 1,100,000+ Type: Online
(See advertisement on p. 89 and outsert)

TripleScoop Market Intelligence

401 S Wilcox, #230
Castle Rock, CO 80109
Ph. 877-292-1347
E-mail: info@thetriplescoop.com
www.thetriplescoop.com
Ted Kendall
Proprietary Panel Mgmt.: Yes

Untiedt Research GmbH

Denkmalstrabe 2
45529 Hattigen
Germany
Ph. 02324-98-33-91
E-mail: info@untiedt.de
www.untiedt.de
Thomas Grzeschik
Panel Titles:
HandwerkerTrend: Plumber Panel
Size: 300 Type: Online
MediTrend: Physician Panel
Size: 400 Type: Online
Untiedt Research Consumer WebPanel France
Size: 15,000 Type: Online
Untiedt Research Consumer WebPanel Germany
Size: 69,000 Type: Online
Untiedt Research Consumer WebPanel Poland
Size: 23,000 Type: Online
Untiedt Research Consumer WebPanel Russia
Size: 29,000 Type: Online
Untiedt Research Consumer WebPanel Spain
Size: 14,000 Type: Online
Untiedt Research Consumer WebPanel UK
Size: 31,000 Type: Online
Untiedt Research Consumer WebPanel USA
Size: 51,000 Type: Online



You wanted options in B2B sampling. We gave you 3.6 million.

Think of us as overachievers. You wanted us to offer B2B professionals. We delivered 3.6 million. You needed diverse and open sources, with fewer duplicates. We're leading the industry with our Optimal Sourcing Strategy and digital fingerprinting. You wanted one partner to trust for B2B. We offer the same SSI quality and service that you rely on for consumer sampling. We think you'll like SSI for B2B.

+1.203.567.7200
info@surveysampling.com
surveysampling.com

We know what the world is thinking



Beijing • Frankfurt • La Quinta, CA • London • Madrid • Mumbai • Paris • Rotterdam • Seoul • Shanghai • Shelton, CT • Stockholm • Sydney • Tokyo • Toronto

Codes

To search for panels by industry or audience, please use the cross-index section on page 113.

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

User Insight

115 Perimeter Center Place N.E. Suite 440
Atlanta, GA 30346
Ph. 770-391-1099
E-mail: contact@userinsight.com
www.userinsight.com

Vernon Research Group

1962 1st Ave. N.E., Suite 2
Cedar Rapids, IA 52402
Ph. 319-364-7278 ext. 108 or 888-710-7278
E-mail: clogue@vernonresearch.com
www.vernonresearch.com
Panel Titles:
Vernon Research Opinion Panel
Type: Online

Virtual Surveys Ltd.

Faulkner House
Faulkner Street
Manchester M1 4DY
United Kingdom
Ph. 44-161-242-1100
E-mail: info@virtualsurveys.com
www.virtualsurveys.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Virtual Surveys
Size: 150,000 Type: Online

Vision Critical

858 Beatty St., 7th floor
Vancouver, BC V6B 1C1
Canada
Ph. 604-647-1980
E-mail: vancouver@visioncritical.com
www.visioncritical.com
Jason Smith, President/COO, Sparq Div.
Proprietary Panel Mgmt.: Yes

Vovici Corporation

45365 Vintage Park Plaza, Suite 250
Dulles, VA 20166
Ph. 800-787-8755 or 703-481-9326
E-mail: sales@vovici.com
www.vovici.com
Proprietary Panel Mgmt.: Yes

**Western Wats**

701 East Timpanogos Pkwy., Bldg. M
Orem, UT 84097
Ph. 801-373-7735
E-mail: contact@westernwats.com
www.westernwats.com
Panel Titles:
Opinion Outpost ePanel
Type: Online

Western Wats has been a trusted one-source market research data collection partner for 20 years and currently serves 200 research organizations worldwide. Western Wats operates an extensive online research panel called Opinion Outpost® which gives researchers access to a broad selection of consumer and business segments. Other services include Live Interviewing, Online Surveys, Automated Telephony, W.I.R.E.™ (Wats Integrated Research Engine) and Online Real-time reporting.
(See advertisement on p. 77)

Wharf Research

1621 Montgomery Street
San Francisco, CA 94111
Ph. 415-693-8900
E-mail: info@wharfresearch.com
www.wharfresearch.com

**WorldOne Research**

Unity Wharf
13 Mill Street
London SE1 2BH
United Kingdom
Ph. 44-20-7252-1118
E-mail: dfedele@w1-research.com
www.w1-research.com
Douglas Fedele
Panel Titles:
WorldOne's European IT Panel
Size: 35,000 Type: Online
WorldOne's Global Dentist Panel
Size: 9,000 Type: Online
WorldOne's Global Nurse Panel
Size: 85,000 Type: Online
WorldOne's Global Pharmacists Panel
Size: 23,000 Type: Telephone, Online
WorldOne's Global Physician Panel
Size: 320,000 Type: Online
WorldOne's Global Veterinarian Panel
Size: 12,000 Type: Online

WorldOne is known for its dedicated global online health care panels in excess of 320,000 telephone verified panelists around the world. WorldOne always provides feasibility assessments on every project in order to know whether the requested sample size is achievable. The panel required is identified, and if further sample is required, proactive action is taken to top-up recruitment through our call center to ensure fulfillment and delivery on every project.
(See advertisement on p. 70)

**Your2Cents Online Opinion Panel**

(Common Knowledge Research Services)
16200 Dallas Pkwy., Suite 140
Dallas, TX 75248-6897
Ph. 800-710-9147
E-mail: getinfo@commonknowledge.com
www.commonknowledge.com
Steven R. Lavine, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Argentina
Size: 4,472 Type: Online
Australia
Size: 42,854 Type: Online
Austria
Size: 6,101 Type: Online
Belgium
Size: 49,639 Type: Online
Brazil
Size: 30,585 Type: Online
Canada
Size: 25,000 Type: Online
Chile
Size: 1,983 Type: Online
China
Size: 63,214 Type: Online
Czech Republic
Size: 11,739 Type: Online
Denmark
Size: 22,163 Type: Online
Finland
Size: 23,363 Type: Online
France
Size: 355,852 Type: Online
Germany
Size: 167,876 Type: Online
Greece
Size: 9,054 Type: Online

Ireland

Size: 26,169 Type: Online
Italy
Size: 105,963 Type: Online
Japan
Size: 26,041 Type: Online
Mexico
Size: 15,101 Type: Online
Netherlands
Size: 63,769 Type: Online
Norway
Size: 21,230 Type: Online
Peru
Size: 2,149 Type: Online
Poland
Size: 43,043 Type: Online
Portugal
Size: 33,954 Type: Online
Russia
Size: 68,793 Type: Online
Singapore
Size: pending Type: Online
Spain
Size: 146,633 Type: Online
Sweden
Size: 43,102 Type: Online
Switzerland
Size: 5,781 Type: Online
United Kingdom
Size: 503,299 Type: Online
United States
Size: 500,000 Type: Online

Common Knowledge, home of the Your2Cents panel, is now a company of the Toluna Group, delivering global samples of unrivalled reliability and integrity from over 2 million panelists in 30 countries. Our research-only panels offer over 1,200 target selects across consumer, B2B decision makers, health care consumers, technology professions, teens, mobile responders and more. Respondents can be delivered to your programming or ours. We offer the only mobile survey solution to collect data by text, Web or voice. We also offer custom panel and community building and management. Contact us and see why we're the Gold Standard for Online Research!™
(See advertisement on p. 89 and outsert)

Zapera.com A/S

Ryegade 3A
DK-2200 Copenhagen
Denmark
Ph. 45-70-27-22-24
E-mail: info@zapera.com
www.zapera.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Aldresagen (DaneAge Association)
Size: 1,700 Type: Online
Dansk Metal (The Danish Metal Workers' Union)
Size: 1,000 Type: Online
Mandag Morgen (Mondag Morning Weekly)
Size: 300 Type: Online
Zapera.com Denmark Panel
Size: 38,000 Type: Online
Zapera.com Estonia Panel
Size: 4,000 Type: Online
Zapera.com Finland Panel
Size: 16,000 Type: Online
Zapera.com Medical Panel Denmark & Sweden
Size: 1,100 Type: Online
Zapera.com Norway Panel
Size: 17,000 Type: Online
Zapera.com Poland Panel
Size: 5,500 Type: Online

Zoomerang

See MarketTools Inc.

African-American

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 88
African-American Consumer, The, ACNielsen p. 88
American Consumer Opinion®, Decision Analyst, Inc. p. 92
Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
Authentic Response U.S. Consumer Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
Consumer Link Concept Development, Insight Counts p. 98
Consumer Link Consumer Research, Insight Counts p. 98
Consumer Link Customer Satisfaction, Insight Counts p. 98
Consumer Link Ethnographic Research, Insight Counts p. 98
Consumer Link Focus Groups, Insight Counts p. 98
Consumer Link Home Use Tests, Insight Counts p. 98
Consumer Link Product Testing Research, Insight Counts p. 98
CP Research Consumer Database, CPResearch Group, Inc. p. 91
CPResearch Blended Web Panel, CPResearch Group, Inc. p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
e-Rewards Automotive Online Panel, e-Rewards Market Research p. 94
e-Rewards Consumer Ailments Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 94
eSample Speciality Panels, eSample Solutions p. 94
eSample Youth & Teens, eSample Solutions p. 94
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
Focus Forward Online Panel, Focus Forward p. 94
Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 94
Focus World Ethnic Panel, Focus World International, Inc. p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
GMI African-American Panel, GMI (Global Market Insite, Inc.) p. 96
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
Harris Poll Online, Harris Interactive® p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
Mars General Consumer Panel, Mars Research p. 100
Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 102
Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
National Database - USA, Shifrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
NRN Opinion Club, National Research Network - Chicago p. 102
Opinion Place, DMS p. 92
People Panel - Consumer Panel, The, The People Panel p. 104
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
ReRez Consumer Panel, ReRez p. 106
Research Now USA Online Panel, Research Now - New York p. 106
Survey Exchange Panel, Cint USA p. 90
SurveySavvy, Luth Research p. 100
SurveySpot.com (USA), Survey Sampling International p. 108
SurveySpree, DMS p. 92
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
Synovate Automotive Panel, Synovate p. 110
Synovate Financial Panel, Synovate p. 110
Synovate Global Opinion Panels-North America, Synovate p. 110
Synovate Health Conditions Panel, Synovate p. 110
Synovate Technology Panel, Synovate p. 110
Synovate Travel & Leisure Panel, Synovate p. 110

TNS NFO Panel, TNS p. 110

TSN Ethnic Panel, The Sample Network p. 108**United Kingdom, Common Knowledge Research Services** p. 90**United Kingdom, Your2Cents Online Opinion Panel** p. 112**United States, Common Knowledge Research Services** p. 90**United States, Your2Cents Online Opinion Panel** p. 112

Viewpoint Forum, MarketVision Research® p. 100

ZoomPanel, MarketTools, Inc. p. 100

Air Travelers

Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
CPResearch Blended Web Panel, CPResearch Group, Inc. p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112

Asians

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 88
American Consumer Opinion®, Decision Analyst, Inc. p. 92
Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
Authentic Response U.S. Consumer Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
Consumer Link Concept Development, Insight Counts p. 98
Consumer Link Consumer Research, Insight Counts p. 98
Consumer Link Customer Satisfaction, Insight Counts p. 98
Consumer Link Ethnographic Research, Insight Counts p. 98
Consumer Link Focus Groups, Insight Counts p. 98
Consumer Link Home Use Tests, Insight Counts p. 98
Consumer Link Product Testing Research, Insight Counts p. 98
Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
CP Research Consumer Database, CPResearch Group, Inc. p. 91
CPResearch Blended Web Panel, CPResearch Group, Inc. p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
Embrain Panel, Embrain Co., Ltd. p. 92
e-Rewards Automotive Online Panel, e-Rewards Market Research p. 94
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards Consumer Ailments Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 94
eSample International Panel (200+ Countries), eSample Solutions p. 94
eSample Speciality Panels, eSample Solutions p. 94
eSample Youth & Teens, eSample Solutions p. 94
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
Focus Forward Online Panel, Focus Forward p. 94
Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 94
Focus World Ethnic Panel, Focus World International, Inc. p. 94

France, Common Knowledge Research Services p. 90
 France, Your2Cents Online Opinion Panel p. 112
 Germany, Common Knowledge Research Services p. 90
 Germany, Your2Cents Online Opinion Panel p. 112
 GLA Int'l Online household panel in Japan, G.L.A. Int'l Marketing & Research Consultancy p. 94
 GLA Retail flyer/discout coupon monitoring in Japan, G.L.A. Int'l Marketing & Research Consultancy p. 94
 GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
 Greece, Common Knowledge Research Services p. 90
 Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
 Interface Asia Consumer, InterfaceAsia p. 98
 InterfaceAsia B2B / IT, InterfaceAsia p. 98
 InterfaceAsia Medical (Physician), InterfaceAsia p. 98
 Ireland, Common Knowledge Research Services p. 90
 Ireland, Your2Cents Online Opinion Panel p. 112
 Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
 Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
 Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
 Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 102
 Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
 Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 National Database - USA, Shifrin-Hayworth p. 108
 Netherlands, Common Knowledge Research Services p. 90
 Netherlands, Your2Cents Online Opinion Panel p. 112
 Norway, Common Knowledge Research Services p. 90
 Norway, Your2Cents Online Opinion Panel p. 112
 NRN Opinion Club, National Research Network - Chicago p. 102
 Opinion Place, DMS p. 92
 Poland, Common Knowledge Research Services p. 90
 Poland, Your2Cents Online Opinion Panel p. 112
 Portugal, Common Knowledge Research Services p. 90
 Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 ReRez Consumer Panel, ReRez p. 106
 RNB Research Consumer Panel, RNB Research: Fieldwork Specialist for India p. 107
 Survey Exchange Panel, Cint USA p. 90
 SurveySavvy, Luth Research p. 100
 SurveySpot.com (USA), Survey Sampling International p. 108
 SurveySpree, DMS p. 92
 Sweden, Common Knowledge Research Services p. 90
 Sweden, Your2Cents Online Opinion Panel p. 112
 Switzerland, Common Knowledge Research Services p. 90
 Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 TNS NFO Panel, TNS p. 110
 TSN Ethnic Panel, The Sample Network p. 108
 United Kingdom, Common Knowledge Research Services p. 90
 United Kingdom, Your2Cents Online Opinion Panel p. 112
 United States, Common Knowledge Research Services p. 90
 United States, Your2Cents Online Opinion Panel p. 112
 Viewpoint Forum, MarketVision Research® p. 100
 www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Children

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 88
 Austria, Common Knowledge Research Services p. 90
 Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response International Consumer, Authentic Response p. 88
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
 Belgium, Common Knowledge Research Services p. 90
 Belgium, Your2Cents Online Opinion Panel p. 112
 Canadian Consumer Panel, ResearchByNet p. 106
 Childresearch.com Panel, ChildResearch.com p. 90
 ClickIQ Consumer Panel, ClickIQ p. 90
 Consumer Directions, KL Communications, Inc. p. 98
 Consumer Link Concept Development, Insight Counts p. 98
 Consumer Link Consumer Research, Insight Counts p. 98
 Consumer Link Customer Satisfaction, Insight Counts p. 98
 Consumer Link Ethnographic Research, Insight Counts p. 98
 Consumer Link Focus Groups, Insight Counts p. 98
 Consumer Link Home Use Tests, Insight Counts p. 98
 Consumer Link Product Testing Research, Insight Counts p. 98
 CP Research Consumer Database, CPRResearch Group, Inc. p. 91
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 Czech Republic, Common Knowledge Research Services p. 90
 Czech Republic, Your2Cents Online Opinion Panel p. 112
 Denmark, Common Knowledge Research Services p. 90
 Denmark, Your2Cents Online Opinion Panel p. 112

E-Poll Consumer Panel, E-Poll Market Research p. 92
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample Hispanics, eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample Youth & Teens, eSample Solutions p. 94
 Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
 Finland, Common Knowledge Research Services p. 90
 Finland, Your2Cents Online Opinion Panel p. 112
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 94
 Focus World Ethnic Panel, Focus World International, Inc. p. 94
 France, Common Knowledge Research Services p. 90
 France, Your2Cents Online Opinion Panel p. 112
 Germany, Common Knowledge Research Services p. 90
 Germany, Your2Cents Online Opinion Panel p. 112
 GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
 GMI Youth Panel, GMI (Global Market Insite, Inc.) p. 96
 Greece, Common Knowledge Research Services p. 90
 Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
 Interface Asia Consumer, InterfaceAsia p. 98
 Ireland, Common Knowledge Research Services p. 90
 Ireland, Your2Cents Online Opinion Panel p. 112
 Kidscom Club, SpectraCom, Inc. p. 108
 KidzEyes.com, C&R Research Services, Inc. p. 88
 Mindfield Electronics & Gaming Panel, Mindfield Online Internet Panels p. 102
 Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
 Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
 Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
 Mindfield Mothers - Children Panel, Mindfield Online Internet Panels p. 102
 Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
 Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 National Database - USA, Shifrin-Hayworth p. 108
 Netherlands, Common Knowledge Research Services p. 90
 Netherlands, Your2Cents Online Opinion Panel p. 112
 Norway, Common Knowledge Research Services p. 90
 Norway, Your2Cents Online Opinion Panel p. 112
 NRN Opinion Club, National Research Network - Chicago p. 102
 Opinion Place, DMS p. 92
 People Panel - Consumer Panel, The, The People Panel p. 104
 Poland, Common Knowledge Research Services p. 90
 Poland, Your2Cents Online Opinion Panel p. 112
 Portugal, Common Knowledge Research Services p. 90
 Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 ReRez Consumer Panel, ReRez p. 106
 Sample Czar Kids/Teens, Sample Czar, Inc. p. 108
 Southern Solutions Baby Boomer, Southern Solutions p. 108
 Survey Exchange Panel, Cint USA p. 90
 SurveySavvy, Luth Research p. 100
 SurveySpot.com (USA), Survey Sampling International p. 108
 SurveySpree, DMS p. 92
 Sweden, Common Knowledge Research Services p. 90
 Sweden, Your2Cents Online Opinion Panel p. 112
 Switzerland, Common Knowledge Research Services p. 90
 Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 Synovate Voice of the Hispanic Family, Synovate p. 110
 United States, Common Knowledge Research Services p. 90
 United States, Your2Cents Online Opinion Panel p. 112
 Viewpoint Forum, MarketVision Research® p. 100
 Youth ePanel, Survey.com p. 110
 ZoomPanel, MarketTools, Inc. p. 100

College Students

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 88
 American Consumer Opinion®, Decision Analyst, Inc. p. 92
 Austria, Common Knowledge Research Services p. 90
 Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response International Consumer, Authentic Response p. 88
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
 Belgium, Common Knowledge Research Services p. 90
 Belgium, Your2Cents Online Opinion Panel p. 112
 ClickIQ Consumer Panel, ClickIQ p. 90
 Consumer Directions, KL Communications, Inc. p. 98
 Consumer Link Concept Development, Insight Counts p. 98
 Consumer Link Consumer Research, Insight Counts p. 98
 Consumer Link Customer Satisfaction, Insight Counts p. 98
 Consumer Link Ethnographic Research, Insight Counts p. 98
 Consumer Link Focus Groups, Insight Counts p. 98

Consumer Link Home Use Tests, Insight Counts p. 98
 Consumer Link Product Testing Research, Insight Counts p. 98
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 CP Research Consumer Database, CPRResearch Group, Inc. p. 91
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India Consumer Panel, Cross-Tab Marketing Services p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
 E-Poll Consumer Panel, E-Poll Market Research p. 92
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards Consumer Ailments Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
e-Rewards U.Talk.Back Youth Opinion Panel, e-Rewards Market Research p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 94
 eSample Hispanics, eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample Speciality Panels, eSample Solutions p. 94
 eSample Youth & Teens, eSample Solutions p. 94
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
 GenX2Z.com, Anderson Analytics, LLC p. 88
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
Interface Asia Consumer, InterfaceAsia p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 102
Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 mo'web GmbH Consumer Panel, mo'web GmbH p. 102
 National Database - USA, Shifrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
 NRN Opinion Club, National Research Network - Chicago p. 102
Opinion Place, DMS p. 92
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
ReRez Consumer Panel, ReRez p. 106
Research Now French Online Panel, Research Now - New York p. 106
Research Now UK Online Panel, Research Now - New York p. 106
 Resolution Research College, Resolution Research & Marketing, Inc.® p. 106
 RNB Research Consumer Panel, RNB Research: Fieldwork Specialist for India p. 107
 Southern Solutions Generation Y, Southern Solutions p. 108
 Survey Exchange Panel, Cint USA p. 90
SurveySavvy, Luth Research p. 100
SurveySpot.com (USA), Survey Sampling International p. 108
SurveySpree, DMS p. 92
SurveyU Panel, SurveyU p. 110
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Health Conditions Panel, Synovate p. 110
 Teen Insight™, Decision Insight, Inc. p. 92
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Consumers

6th Dimension Consumer Panel, Taylor Nelson SOFRES plc. p. 110
Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 88
 African-American Consumer, The, ACNielsen p. 88
American Consumer Opinion®, Decision Analyst, Inc. p. 92
 AMR Interactive Consumer Panel, AMR Interactive p. 88

Asia Access Panel, Ipsos North America p. 98
Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response International Consumer, Authentic Response p. 88
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
 Berenhaus Consumer Panels, Berenhaus Research Solutions, LLC p. 88
 Boomers & Their Elders, Strategic Directions Group, Inc. p. 108
 Canadian Consumer Panel, ResearchByNet p. 106
 Canadian Viewpoint Consumer Panel, Canadian Viewpoint, Inc. p. 90
 ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 Consumer ePanel, Survey.com p. 110
 Consumer Link Concept Development, Insight Counts p. 98
 Consumer Link Consumer Research, Insight Counts p. 98
 Consumer Link Customer Satisfaction, Insight Counts p. 98
 Consumer Link Ethnographic Research, Insight Counts p. 98
 Consumer Link Focus Groups, Insight Counts p. 98
 Consumer Link Home Use Tests, Insight Counts p. 98
 Consumer Link Product Testing Research, Insight Counts p. 98
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 ConsumerScan, Consumerscan International p. 90
 CP Research Consumer Database, CPRResearch Group, Inc. p. 91
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Cross-Tab Borderless Access - India Consumer Panel, Cross-Tab Marketing Services p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
 Datatelligence Online, Datatelligence Online p. 91
 Datatelligence Online Community Access Panel, Datatelligence Online p. 91
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
 Dialego German Access Panel, Dialego AG Market Research Online p. 92
 DoctorDirectory Consumer Panel, DoctorDirectory.com, Inc. p. 92
 DRI Consumer Panel, Digital Research, Inc. p. 92
 EcoUnit Eco-Aware Consumer Panel, EcoUnit LLC p. 92
 E-Poll Consumer Panel, E-Poll Market Research p. 92
 e-Research-Global.com Panel, e-research-global.com p. 92
e-Rewards Automotive Online Panel, e-Rewards Market Research p. 94
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards Consumer Ailments Online Panel, e-Rewards Market Research p. 94
e-Rewards France Online Panel, e-Rewards Market Research p. 94
e-Rewards Germany Online Panels, e-Rewards Market Research p. 94
e-Rewards Netherlands Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
e-Rewards U.Talk.Back Youth Opinion Panel, e-Rewards Market Research p. 94
e-Rewards United Kingdom Online Panels, e-Rewards Market Research p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample Hispanics, eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample Speciality Panels, eSample Solutions p. 94
 eSample Youth & Teens, eSample Solutions p. 94
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
 European Access Panel, Ipsos North America p. 98
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 94
 Focus World Ethnic Panel, Focus World International, Inc. p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
 Gallup Panel, The, The Gallup Panel p. 94
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
 GfK USA Online Panel, GfK Custom Research North America p. 96
 GLA Int'l Online household panel in Japan, G.L.A. Int'l Marketing & Research Consultancy p. 94
 Global Test Market, NovaTest p. 102
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
 GMR Panel, Grace Market Research, Inc. p. 97
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
Greenfield Online Global Panel, Greenfield Online p. 97
Greenfield Online Leisure Activities Panel, Greenfield Online p. 97
 Harris Interactive Chronic Illness Panel, Harris Interactive® p. 98
 Harris Poll Online, Harris Interactive® p. 98
 Homescan, ACNielsen p. 88
 Homescan Panel Views Survey, ACNielsen p. 88
 i.thinker Panel, i.think inc. p. 98
 IDOP (Interactive Dynamic Online Panel), MediaTransfer AG Netresearch & Consulting p. 102
 InsightExpress Opinion-Central, InsightExpress, LLC p. 98
 Intended Users, ACNielsen p. 88
Interface Asia Consumer, InterfaceAsia p. 98
 Ipsos North America Online Panel, Ipsos North America p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112

Italy, Common Knowledge Research Services p. 90
 Italy, Your2Cents Online Opinion Panel p. 112
 KidzEyes.com, C&R Research Services, Inc. p. 88
 Know More™ Internet Panel, Data Development Worldwide p. 91
 KnowledgePanel®, Knowledge Networks p. 100
 LatinoEyes.com, C&R Research Services, Inc. p. 88
 Lightspeed Consumer Panel, Lightspeed Research p. 100
 Mars General Consumer Panel, Mars Research p. 100
 Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
 Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
 Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
 Mindfield Homeowner & Lawncare Panel, Mindfield Online Internet Panels p. 102
 Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 102
 Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
 Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 mo'web GmbH Consumer Panel, mo'web GmbH p. 102
 NAHB Consumer Panel, NAHB Research Center p. 102
 National Database - USA, Shifrin-Hayworth p. 108
 National Field & Focus Consumer Panel, National Field & Focus, Inc. p. 102
 National Shopper Lab, Knowledge Networks p. 100
 Netherlands, Common Knowledge Research Services p. 90
 Netherlands, Your2Cents Online Opinion Panel p. 112
 Nextplora Consumer Panel, Nextplora S.p.a. p. 102
 Norway, Common Knowledge Research Services p. 90
 Norway, Your2Cents Online Opinion Panel p. 112
 NPD Online Research Panel, The NPD Group, Inc. p. 102
 NRN Opinion Club, National Research Network - Chicago p. 102
 Opinion Outpost ePanel, Western Wats p. 112
 Opinion Place, DMS p. 92
 Opinion Search Consumer Panel, Opinion Search Inc. p. 104
 Pearson Mexican Consumer Panel, Pearson, S.A. de C.V. p. 104
 People Panel - Consumer Panel, The, The People Panel p. 104
 Persuadable Research Panel, Persuadable Research Corporation p. 105
 Poland, Common Knowledge Research Services p. 90
 Poland, Your2Cents Online Opinion Panel p. 112
 Portugal, Common Knowledge Research Services p. 90
 Portugal, Your2Cents Online Opinion Panel p. 112
 Precision Research Custom Panels, Precision Research Inc. p. 105
 Qualified Opinion Panels, Qualified Opinions p. 106
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 ReRez Consumer Panel, ReRez p. 106
 Research Now Australian Online Panel, Research Now - New York p. 106
 Research Now Austrian Online Panel, Research Now - New York p. 106
 Research Now Brazil Online Panel, Research Now - New York p. 106
 Research Now Canada Online Panel, Research Now - New York p. 106
 Research Now Czech Online Panel, Research Now - New York p. 106
 Research Now Danish Online Panel, Research Now - New York p. 106
 Research Now Dutch Online Panel, Research Now - New York p. 106
 Research Now Finnish Online Panel, Research Now - New York p. 106
 Research Now French Online Panel, Research Now - New York p. 106
 Research Now German Online Panel, Research Now - New York p. 106
 Research Now Greek Online Panel, Research Now - New York p. 106
 Research Now Hungarian Online Panel, Research Now - New York p. 106
 Research Now Irish Online Panel, Research Now - New York p. 106
 Research Now Italian Online Panel, Research Now - New York p. 106
 Research Now New Zealand Online Panel, Research Now - New York p. 106
 Research Now Norwegian Online Panel, Research Now - New York p. 106
 Research Now Polish Online Panel, Research Now - New York p. 106
 Research Now Portuguese Online Panel, Research Now - New York p. 106
 Research Now Russian Online Panel, Research Now - New York p. 106
 Research Now Spanish Online Panel, Research Now - New York p. 106
 Research Now Swedish Online Panel, Research Now - New York p. 106
 Research Now Switzerland Online Panel, Research Now - New York p. 106
 Research Now UK Online Panel, Research Now - New York p. 106
 Research Now USA Online Panel, Research Now - New York p. 106
 Resolution Research College, Resolution Research & Marketing, Inc.® p. 106
 Resolution Research Consumers, Resolution Research & Marketing, Inc.® p. 106
 Resonance Online Household Panel (U.S./Canada), Resonance Insights p. 107
 RestaurantInsights.com Consumer Panel, RestaurantInsights.com p. 107
 RNB Research Consumer Panel, RNB Research: Fieldwork Specialist for India p. 107
 Sample Czar Consumer, Sample Czar, Inc. p. 108
 SmartPanel of Consumers, FGI Research p. 94
 Southern Solutions Baby Boomer, Southern Solutions p. 108
 Southern Solutions General Consumers, Southern Solutions p. 108
 Southern Solutions Generation X, Southern Solutions p. 108
 Southern Solutions Pet Owners, Southern Solutions p. 108
 Spain, Common Knowledge Research Services p. 90
 Spain, Your2Cents Online Opinion Panel p. 112
 Sparks® Creative Consumers, Murphy Marketing Research/TrendTown p. 102
 SpectraCom Research Panel, SpectraCom, Inc. p. 108
 Survey Exchange Panel, Cint USA p. 90
 Surveycafe.com, Resource Systems Group, Inc. p. 107
 SurveySavvy, Luth Research p. 100
 Surveyspot.com (USA), Survey Sampling International p. 108
 SurveySpree, DMS p. 92
 Sweden, Common Knowledge Research Services p. 90

Sweden, Your2Cents Online Opinion Panel p. 112
 Switzerland, Common Knowledge Research Services p. 90
 Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels - Asia Pacific, Synovate p. 110
 Synovate Global Opinion Panels - Western Europe, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 Synovate Voice of the Hispanic Family, Synovate p. 110
 Team Vier CATI Panel, Team Vier b.v. p. 110
 Team Vier WAPI Panel, Team Vier b.v. p. 110
 TeensEyes.com, C&R Research Services, Inc. p. 88
 The Buzz, Synovate - Perth p. 110
 TNS NFO Chronic Ailment Panel, TNS p. 110
 TNS NFO Investor Panel, TNS p. 110
 TNS NFO Panel, TNS p. 110
 TSN Consumer Panel, The Sample Network p. 108
 United Kingdom, Common Knowledge Research Services p. 90
 United Kingdom, Your2Cents Online Opinion Panel p. 112
 United States, Common Knowledge Research Services p. 90
 United States, Your2Cents Online Opinion Panel p. 112
 Vernon Research Opinion Panel, Vernon Research Group p. 112
 Viewpoint Forum, MarketVision Research® p. 100
 www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

CPAs/Financial Advisors

Affordable Samples Online Business Panel, Affordable Samples, Inc. p. 88
 AMR Interactive Small/Medium Business Panel, AMR Interactive p. 88
 Austria, Common Knowledge Research Services p. 90
 Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response Global B2B Panel, Authentic Response p. 88
 Belgium, Common Knowledge Research Services p. 90
 Belgium, Your2Cents Online Opinion Panel p. 112
 ClickIQ Consumer Panel, ClickIQ p. 90
 Consumer Directions, KL Communications, Inc. p. 98
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 CPRResearch Business Database, CPRResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Cross-Tab Borderless Access - India Consumer Panel, Cross-Tab Marketing Services p. 91
 Czech Republic, Common Knowledge Research Services p. 90
 Czech Republic, Your2Cents Online Opinion Panel p. 112
 Denmark, Common Knowledge Research Services p. 90
 Denmark, Your2Cents Online Opinion Panel p. 112
 e-Rewards Business to Business Online Panel, e-Rewards Market Research p. 94
 e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
 e-Rewards France Online Panel, e-Rewards Market Research p. 94
 e-Rewards Germany Online Panels, e-Rewards Market Research p. 94
 e-Rewards Netherlands Online Panel, e-Rewards Market Research p. 94
 e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 e-Rewards United Kingdom Online Panels, e-Rewards Market Research p. 94
 eSample B2B Panel (U.S./Canada), eSample Solutions p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 Expert DecisionMaker Panels, DM2-Decision Maker® p. 92
 Finland, Common Knowledge Research Services p. 90
 Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
 Fortunecouncil.com, Resource Systems Group, Inc. p. 107
 France, Common Knowledge Research Services p. 90
 France, Your2Cents Online Opinion Panel p. 112
 Germany, Common Knowledge Research Services p. 90
 Germany, Your2Cents Online Opinion Panel p. 112
 GMI Consumer Panel, GMI (Global Market Insight, Inc.) p. 96
 Greece, Common Knowledge Research Services p. 90
 Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
 InterfaceAsia B2B / IT, InterfaceAsia p. 98
 Ireland, Common Knowledge Research Services p. 90
 Ireland, Your2Cents Online Opinion Panel p. 112
 Italy, Common Knowledge Research Services p. 90
 Italy, Your2Cents Online Opinion Panel p. 112
 mo'web GmbH B2B Panel, mo'web GmbH p. 102
 National Database - USA, Shifrin-Hayworth p. 108
 Netherlands, Common Knowledge Research Services p. 90
 Netherlands, Your2Cents Online Opinion Panel p. 112
 Norway, Common Knowledge Research Services p. 90
 Norway, Your2Cents Online Opinion Panel p. 112
 Panelspeak Small Business Panel, Amplitude Research, Inc. p. 88
 Poland, Common Knowledge Research Services p. 90
 Poland, Your2Cents Online Opinion Panel p. 112

Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 RNB Research B2B Panel, RNB Research: Fieldwork Specialist for India p. 107
Spain, Common Knowledge Research Services p. 90
Spain, Your2Cents Online Opinion Panel p. 112
 Survey Exchange Panel, Cint USA p. 90
SurveySavvy, Luth Research p. 100
SurveySpot.com (USA), Survey Sampling International p. 108
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 TNS NFO Occupation & Industry Panel, TNS p. 110
United Kingdom, Common Knowledge Research Services p. 90
United Kingdom, Your2Cents Online Opinion Panel p. 112
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
 ZoomPanel, MarketTools, Inc. p. 100

Dentists

all global Online, all global p. 88
Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response Global B2B Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
 Berenhaus B2B Panels, Berenhaus Research Solutions, LLC p. 88
 ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 CPResearch Blended Web Panel, CPResearch Group, Inc. p. 91
 CPResearch Business Database, CPResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
e-Rewards Healthcare Professionals Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample B2B Panel (U.S./Canada), eSample Solutions p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample Medical Professionals Panel (U.S./Canada), eSample Solutions p. 94
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
GMI Consumer Panel, GMI (Global Market Insight, Inc.) p. 96
GMI Physician Panel, GMI (Global Market Insight, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
Greenfield Online Physicians Panel, Greenfield Online p. 97
 Harris Poll Online, Harris Interactive® p. 98
InterfaceAsia Medical (Physician), InterfaceAsia p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
Italy, Common Knowledge Research Services p. 90
Italy, Your2Cents Online Opinion Panel p. 112
JRA Healthcare Professionals Panel, JRA: Global Healthcare Research Services p. 98
Medical Advisory Board, Decision Analyst, Inc. p. 92
Mindfield Physician Panel, Mindfield Online Internet Panels p. 102
 mo'web GmbH Medical Panel, mo'web GmbH p. 102
 National Database - USA, Shiffrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
 PharmaField Research, Consumer Research Centre Ltd. p. 90
Physicians Consulting Network, Physicians Consulting Network p. 105
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
Ricca Group Allied Health Professionals, Ricca Group, Inc. p. 107

RNB Research Physicians Panel, RNB Research: Fieldwork Specialist for India p. 107
Spain, Common Knowledge Research Services p. 90
Spain, Your2Cents Online Opinion Panel p. 112
SurveySavvy, Luth Research p. 100
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels - Western Europe, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 TNS NFO Occupation & Industry Panel, TNS p. 110
TSN Healthcare Panel, The Sample Network p. 108
United Kingdom, Common Knowledge Research Services p. 90
United Kingdom, Your2Cents Online Opinion Panel p. 112
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
WorldOne's Global Dentist Panel, WorldOne Research p. 112
 ZoomPanel, MarketTools, Inc. p. 100

Educators (Schools/Teachers)

Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response Global B2B Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
 ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 CPResearch Blended Web Panel, CPResearch Group, Inc. p. 91
 CPResearch Business Database, CPResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Cross-Tab Borderless Access - India Consumer Panel, Cross-Tab Marketing Services p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample B2B Panel (U.S./Canada), eSample Solutions p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
GMI Consumer Panel, GMI (Global Market Insight, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
InterfaceAsia B2B / IT, InterfaceAsia p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
 National Database - USA, Shiffrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
SurveySavvy, Luth Research p. 100
SurveySpot.com (USA), Survey Sampling International p. 108
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels - Western Europe, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 TNS NFO Occupation & Industry Panel, TNS p. 110
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
 ZoomPanel, MarketTools, Inc. p. 100

Employees

Affordable Samples Online Business Panel, Affordable Samples, Inc. p. 88
 AMR Interactive Consumer Panel, AMR Interactive p. 88
Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response Global B2B Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
 ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 Consumer Link Employee Satisfaction, Insight Counts p. 98
 Consumer Link Product Testing Research, Insight Counts p. 98
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 CPRResearch Business Database, CPRResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Cross-Tab Borderless Access - India Consumer Panel, Cross-Tab Marketing Services p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
e-Rewards Business to Business Online Panel, e-Rewards Market Research p. 94
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards France Online Panel, e-Rewards Market Research p. 94
e-Rewards Germany Online Panels, e-Rewards Market Research p. 94
e-Rewards Netherlands Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
e-Rewards U.Talk.Back Youth Opinion Panel, e-Rewards Market Research p. 94
e-Rewards United Kingdom Online Panels, e-Rewards Market Research p. 94
 eSample B2B Panel (U.S./Canada), eSample Solutions p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample IT Professionals, eSample Solutions p. 94
 eSample Youth & Teens, eSample Solutions p. 94
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
 Gallup Panel, The, The Gallup Panel p. 94
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
 IDOP (Interactive Dynamic Online Panel), MediaTransfer AG Netresearch & Consulting p. 102
InterfaceAsia B2B / IT, InterfaceAsia p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
Italy, Common Knowledge Research Services p. 90
Italy, Your2Cents Online Opinion Panel p. 112
 mo'web GmbH Consumer Panel, mo'web GmbH p. 102
 National Database - USA, Shifrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
 NRN Opinion Club, National Research Network - Chicago p. 102
Opinion Search Consumer Panel, Opinion Search Inc. p. 104
 Panelspeak Small Business Panel, Amplitude Research, Inc. p. 88
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
Research Now Australian Online Panel, Research Now - New York p. 106
Research Now Austrian Online Panel, Research Now - New York p. 106
Research Now Brazil Online Panel, Research Now - New York p. 106
Research Now Canada Online Panel, Research Now - New York p. 106
Research Now Czech Online Panel, Research Now - New York p. 106
Research Now Danish Online Panel, Research Now - New York p. 106
Research Now Dutch Online Panel, Research Now - New York p. 106
Research Now Finnish Online Panel, Research Now - New York p. 106
Research Now French Online Panel, Research Now - New York p. 106
Research Now German Online Panel, Research Now - New York p. 106
Research Now Greek Online Panel, Research Now - New York p. 106
Research Now Hungarian Online Panel, Research Now - New York p. 106
Research Now Irish Online Panel, Research Now - New York p. 106
Research Now Italian Online Panel, Research Now - New York p. 106
Research Now New Zealand Online Panel, Research Now - New York p. 106
Research Now Norwegian Online Panel, Research Now - New York p. 106
Research Now Polish Online Panel, Research Now - New York p. 106

Research Now Portuguese Online Panel, Research Now - New York p. 106
Research Now Russian Online Panel, Research Now - New York p. 106
Research Now Spanish Online Panel, Research Now - New York p. 106
Research Now Swedish Online Panel, Research Now - New York p. 106
Research Now Switzerland Online Panel, Research Now - New York p. 106
Research Now UK Online Panel, Research Now - New York p. 106
Research Now USA Online Panel, Research Now - New York p. 106
 RNB Research B2B Panel, RNB Research: Fieldwork Specialist for India p. 107
 Sample Czar Business, Sample Czar, Inc. p. 108
Spain, Common Knowledge Research Services p. 90
Spain, Your2Cents Online Opinion Panel p. 112
 SpectraCom Research Panel, SpectraCom, Inc. p. 108
 Survey Exchange Panel, Cint USA p. 90
SurveySavvy, Luth Research p. 100
SurveySpot.com (USA), Survey Sampling International p. 108
SurveySpree, DMS p. 92
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels - Western Europe, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 Synovate Voice of the Hispanic Family, Synovate p. 110
 The Buzz, Synovate - Perth p. 110
United Kingdom, Common Knowledge Research Services p. 90
United Kingdom, Your2Cents Online Opinion Panel p. 112
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Entrepreneurs/Small Business

Affordable Samples Online Business Panel, Affordable Samples, Inc. p. 88
Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response Global B2B Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
 Business ePanel, Survey.com p. 110
 ClickIQ Small Business, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 Consumer Link Employee Satisfaction, Insight Counts p. 98
 Consumer Link Product Testing Research, Insight Counts p. 98
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 CPRResearch Business Database, CPRResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Cross-Tab Borderless Access - India Consumer Panel, Cross-Tab Marketing Services p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
e-Rewards Business to Business Online Panel, e-Rewards Market Research p. 94
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards France Online Panel, e-Rewards Market Research p. 94
e-Rewards Germany Online Panels, e-Rewards Market Research p. 94
e-Rewards Netherlands Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
e-Rewards United Kingdom Online Panels, e-Rewards Market Research p. 94
 eSample B2B Panel (U.S./Canada), eSample Solutions p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample IT Professionals, eSample Solutions p. 94
Esearch Business/IT Panel, Esearch.com, Inc. p. 94
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
Executive Advisory Board, Decision Analyst, Inc. p. 92
 Expert DecisionMaker Panels, DM2-Decision Maker® p. 92
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98

IDOP (Interactive Dynamic Online Panel), MediaTransfer AG Netresearch & Consulting p. 102
InterfaceAsia B2B / IT, InterfaceAsia p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
 mo'web GmbH B2B Panel, mo'web GmbH p. 102
 National Database - USA, Shifrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
Opinion Search Consumer Panel, Opinion Search Inc. p. 104
 Panelspeak Small Business Panel, Amplitude Research, Inc. p. 88
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 RNB Research B2B Panel, RNB Research: Fieldwork Specialist for India p. 107
 Survey Exchange Panel, Cint USA p. 90
SurveySpot.com (USA), Survey Sampling International p. 108
SurveySpree, DMS p. 92
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 TNS NFO Occupation & Industry Panel, TNS p. 110
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
 Viewpoint Forum, MarketVision Research® p. 100
www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Executives/Management

Affordable Samples Online Business Panel, Affordable Samples, Inc. p. 88
 AMR Interactive Small/Medium Business Panel, AMR Interactive p. 88
Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response Global B2B Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
 Berenhaus B2B Panels, Berenhaus Research Solutions, LLC p. 88
 Business ePanel, Survey.com p. 110
 C-Level Executive ePanel, Survey.com p. 110
 ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 Consumer Link Employee Satisfaction, Insight Counts p. 98
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 CPRResearch Business Database, CPRResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Cross-Tab Borderless Access - India Consumer Panel, Cross-Tab Marketing Services p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
e-Rewards Business to Business Online Panel, e-Rewards Market Research p. 94
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards France Online Panel, e-Rewards Market Research p. 94
e-Rewards Germany Online Panels, e-Rewards Market Research p. 94
e-Rewards Netherlands Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
e-Rewards United Kingdom Online Panels, e-Rewards Market Research p. 94
 eSample B2B Panel (U.S./Canada), eSample Solutions p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample IT Professionals, eSample Solutions p. 94
 eSample Medical Professionals Panel (U.S./Canada), eSample Solutions p. 94
Esearch Business/IT Panel, Esearch.com, Inc. p. 94
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
Executive Advisory Board, Decision Analyst, Inc. p. 92
 Expert DecisionMaker Panels, DM2-Decision Maker® p. 92
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
 Fortunecouncil.com, Resource Systems Group, Inc. p. 107
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
Germany, Common Knowledge Research Services p. 90

Germany, Your2Cents Online Opinion Panel p. 112
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
Greenfield Online B2B/IT Panel, Greenfield Online p. 97
 Harris Poll Online, Harris Interactive® p. 98
 IDOP (Interactive Dynamic Online Panel), MediaTransfer AG Netresearch & Consulting p. 102
InterfaceAsia B2B / IT, InterfaceAsia p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
 IT Decision Maker ePanel, Survey.com p. 110
 IT Decision Makers Panel, Hansa/GCR, LLC p. 97
Italy, Common Knowledge Research Services p. 90
Italy, Your2Cents Online Opinion Panel p. 112
 mo'web GmbH B2B Panel, mo'web GmbH p. 102
 National Database - USA, Shifrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
 Panelspeak Small Business Panel, Amplitude Research, Inc. p. 88
 Persuadable Research Panel, Persuadable Research Corporation p. 105
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
Research Now French Online Panel, Research Now - New York p. 106
Research Now German Online Panel, Research Now - New York p. 106
Research Now Italian Online Panel, Research Now - New York p. 106
Research Now UK Online Panel, Research Now - New York p. 106
Research Now USA Online Panel, Research Now - New York p. 106
 Resolution Research IT/B2B, Resolution Research & Marketing, Inc.® p. 106
 RNB Research B2B Panel, RNB Research: Fieldwork Specialist for India p. 107
 RONIN IT International Panel, RONIN Focus p. 107
 Sample Czar Business, Sample Czar, Inc. p. 108
Spain, Common Knowledge Research Services p. 90
Spain, Your2Cents Online Opinion Panel p. 112
 Survey Exchange Panel, Cint USA p. 90
SurveySavvy, Luth Research p. 100
SurveySpot.com (USA), Survey Sampling International p. 108
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
Technology Advisory Board, Decision Analyst, Inc. p. 92
 The Buzz, Synovate - Perth p. 110
 TNS NFO Occupation & Industry Panel, TNS p. 110
United Kingdom, Common Knowledge Research Services p. 90
United Kingdom, Your2Cents Online Opinion Panel p. 112
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
 US Financial Decision Makers, ResearchByNet p. 106
www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Gay & Lesbian

American Consumer Opinion®, Decision Analyst, Inc. p. 92
 Authentic Response International Consumer, Authentic Response p. 88
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Consumer Directions, KL Communications, Inc. p. 98
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample Hispanics, eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample Speciality Panels, eSample Solutions p. 94
 eSample Youth & Teens, eSample Solutions p. 94
 Focus Forward Online Panel, Focus Forward p. 94
France, Common Knowledge Research Services p. 90
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
 Harris Interactive Gay, Lesbian & Bisexual, Harris Interactive® p. 98
 Harris Poll Online, Harris Interactive® p. 98
Ireland, Common Knowledge Research Services p. 90
Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102

Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 102
 Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
 Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 Portugal, Common Knowledge Research Services p. 90
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 SurveySpot.com (USA), Survey Sampling International p. 108
 ZoomPanel, MarketTools, Inc. p. 100

Hispanic

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 88
 American Consumer Opinion®, Decision Analyst, Inc. p. 92
 Austria, Common Knowledge Research Services p. 90
 Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
 Belgium, Common Knowledge Research Services p. 90
 Belgium, Your2Cents Online Opinion Panel p. 112
 ClickIQ Consumer Panel, ClickIQ p. 90
 Consumer Directions, KL Communications, Inc. p. 98
 Consumer Link Concept Development, Insight Counts p. 98
 Consumer Link Consumer Research, Insight Counts p. 98
 Consumer Link Customer Satisfaction, Insight Counts p. 98
 Consumer Link Ethnographic Research, Insight Counts p. 98
 Consumer Link Focus Groups, Insight Counts p. 98
 Consumer Link Home Use Tests, Insight Counts p. 98
 Consumer Link Product Testing Research, Insight Counts p. 98
 CP Research Consumer Database, CPResearch Group, Inc. p. 91
 CPResearch Blended Web Panel, CPResearch Group, Inc. p. 91
 Czech Republic, Common Knowledge Research Services p. 90
 Czech Republic, Your2Cents Online Opinion Panel p. 112
 Denmark, Common Knowledge Research Services p. 90
 Denmark, Your2Cents Online Opinion Panel p. 112
 e-Rewards Automotive Online Panel, e-Rewards Market Research p. 94
 e-Rewards Consumer Ailments Online Panel, e-Rewards Market Research p. 94
 e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 94
 eSample Hispanics, eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample Speciality Panels, eSample Solutions p. 94
 eSample Youth & Teens, eSample Solutions p. 94
 Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
 Finland, Common Knowledge Research Services p. 90
 Finland, Your2Cents Online Opinion Panel p. 112
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 94
 Focus World Ethnic Panel, Focus World International, Inc. p. 94
 France, Common Knowledge Research Services p. 90
 France, Your2Cents Online Opinion Panel p. 112
 Germany, Common Knowledge Research Services p. 90
 Germany, Your2Cents Online Opinion Panel p. 112
 GMI Consumer Panel, GMI (Global Market Insight, Inc.) p. 96
 GMI Hispanic Panel, GMI (Global Market Insight, Inc.) p. 96
 Greece, Common Knowledge Research Services p. 90
 Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
 Ireland, Common Knowledge Research Services p. 90
 Ireland, Your2Cents Online Opinion Panel p. 112
 KnowledgePanel Latino SM, Knowledge Networks p. 100
 KnowledgePanel®, Knowledge Networks p. 100
 LatinoEyes.com, C&R Research Services, Inc. p. 88
 Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
 Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
 Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
 Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 102
 Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
 Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 National Database - USA, Shiffrin-Hayworth p. 108
 Netherlands, Common Knowledge Research Services p. 90
 Netherlands, Your2Cents Online Opinion Panel p. 112
 Norway, Common Knowledge Research Services p. 90
 Norway, Your2Cents Online Opinion Panel p. 112
 NRN Opinion Club, National Research Network - Chicago p. 102
 Opinion Place, DMS p. 92
 Poland, Common Knowledge Research Services p. 90
 Poland, Your2Cents Online Opinion Panel p. 112
 Portugal, Common Knowledge Research Services p. 90
 Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 ReRez Hispanics Panel, ReRez p. 106
 Research Now USA Online Panel, Research Now - New York p. 106
 Sample Czar Hispanic, Sample Czar, Inc. p. 108
 SurveySavvy, Luth Research p. 100
 SurveySpot.com (USA), Survey Sampling International p. 108
 SurveySpree, DMS p. 92
 Sweden, Common Knowledge Research Services p. 90

Sweden, Your2Cents Online Opinion Panel p. 112
 Switzerland, Common Knowledge Research Services p. 90
 Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 Synovate Voice of the Hispanic Family, Synovate p. 110
 TNS NFO Hispanic Panel, TNS p. 110
 TNS NFO Panel, TNS p. 110
 TSN Ethnic Panel, The Sample Network p. 108
 Tu Opinion Latina (Hispanic Panel), DMS p. 92
 United States, Common Knowledge Research Services p. 90
 United States, Your2Cents Online Opinion Panel p. 112
 Viewpoint Forum, MarketVision Research® p. 100
 ZoomPanel, MarketTools, Inc. p. 100

Information Technology (IT)

Austria, Common Knowledge Research Services p. 90
 Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response Global B2B Panel, Authentic Response p. 88
 Belgium, Common Knowledge Research Services p. 90
 Belgium, Your2Cents Online Opinion Panel p. 112
 ClickIQ Consumer Panel, ClickIQ p. 90
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 CPResearch Blended Web Panel, CPResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Cross-Tab Borderless Access - India Consumer Panel, Cross-Tab Marketing Services p. 91
 Czech Republic, Common Knowledge Research Services p. 90
 Czech Republic, Your2Cents Online Opinion Panel p. 112
 Denmark, Common Knowledge Research Services p. 90
 Denmark, Your2Cents Online Opinion Panel p. 112
 e-Rewards Business to Business Online Panel, e-Rewards Market Research p. 94
 e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
 e-Rewards France Online Panel, e-Rewards Market Research p. 94
 e-Rewards Germany Online Panels, e-Rewards Market Research p. 94
 e-Rewards Netherlands Online Panel, e-Rewards Market Research p. 94
 e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 e-Rewards United Kingdom Online Panels, e-Rewards Market Research p. 94
 eSample IT Professionals, eSample Solutions p. 94
 Esearch Business/IT Panel, Esearch.com, Inc. p. 94
 Expert DecisionMaker Panels, DM2-Decision Maker® p. 92
 Finland, Common Knowledge Research Services p. 90
 Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 94
 France, Common Knowledge Research Services p. 90
 France, Your2Cents Online Opinion Panel p. 112
 Germany, Common Knowledge Research Services p. 90
 Germany, Your2Cents Online Opinion Panel p. 112
 GMI Consumer Panel, GMI (Global Market Insight, Inc.) p. 96
 GMI IT Professional Panel, GMI (Global Market Insight, Inc.) p. 96
 Greece, Common Knowledge Research Services p. 90
 Greece, Your2Cents Online Opinion Panel p. 112
 Greenfield Online B2B/IT Panel, Greenfield Online p. 97
 Harris Interactive Technology Decision Makers, Harris Interactive® p. 98
 Harris Poll Online, Harris Interactive® p. 98
 IDOP (Interactive Dynamic Online Panel), MediaTransfer AG Netresearch & Consulting p. 102
 InterfaceAsia B2B / IT, InterfaceAsia p. 98
 Ireland, Common Knowledge Research Services p. 90
 Ireland, Your2Cents Online Opinion Panel p. 112
 IT Decision Maker ePanel, Survey.com p. 110
 IT Decision Makers, Peanut Labs p. 104
 Italy, Common Knowledge Research Services p. 90
 Italy, Your2Cents Online Opinion Panel p. 112
 Mindfield Technology, Mindfield Online Internet Panels p. 102
 mo'web GmbH IT Panel, mo'web GmbH p. 102
 National Database - USA, Shiffrin-Hayworth p. 108
 Netherlands, Common Knowledge Research Services p. 90
 Netherlands, Your2Cents Online Opinion Panel p. 112
 Norway, Common Knowledge Research Services p. 90
 Norway, Your2Cents Online Opinion Panel p. 112
 Osterman Research Panel, Osterman Research, Inc. p. 104
 Panelspeak Small Business Panel, Amplitude Research, Inc. p. 88
 Panelspeak Technology Panel, Amplitude Research, Inc. p. 88
 Poland, Common Knowledge Research Services p. 90
 Poland, Your2Cents Online Opinion Panel p. 112
 Portugal, Common Knowledge Research Services p. 90
 Portugal, Your2Cents Online Opinion Panel p. 112
 ReRez B2B Panel, ReRez p. 106
 Research Now Australian Online Panel, Research Now - New York p. 106
 Research Now Canada Online Panel, Research Now - New York p. 106

Research Now French Online Panel, Research Now - New York p. 106
 Research Now German Online Panel, Research Now - New York p. 106
 Research Now Italian Online Panel, Research Now - New York p. 106
 Research Now UK Online Panel, Research Now - New York p. 106
 Research Now USA Online Panel, Research Now - New York p. 106
 Resolution Research IT/B2B, Resolution Research & Marketing, Inc.® p. 106
 RONIN IT International Panel, RONIN Focus p. 107
 Spain, Common Knowledge Research Services p. 90
 Spain, Your2Cents Online Opinion Panel p. 112
 Survey Exchange Panel, Cint USA p. 90
 SurveySavvy, Luth Research p. 100
 Sweden, Common Knowledge Research Services p. 90
 Sweden, Your2Cents Online Opinion Panel p. 112
 Switzerland, Common Knowledge Research Services p. 90
 Switzerland, Your2Cents Online Opinion Panel p. 112
 Technology Advisory Board, Decision Analyst, Inc. p. 92
 TechTarget IT Research Panel, TechTarget, Inc. p. 110
 United Kingdom, Common Knowledge Research Services p. 90
 United Kingdom, Your2Cents Online Opinion Panel p. 112
 United States, Common Knowledge Research Services p. 90
 United States, Your2Cents Online Opinion Panel p. 112
 WorldOne's European IT Panel, WorldOne Research p. 112
 www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Lawyers

Austria, Common Knowledge Research Services p. 90
 Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
 Belgium, Common Knowledge Research Services p. 90
 Belgium, Your2Cents Online Opinion Panel p. 112
 ClickIQ Consumer Panel, ClickIQ p. 90
 Consumer Directions, KL Communications, Inc. p. 98
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 CPRResearch Business Database, CPRResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Czech Republic, Common Knowledge Research Services p. 90
 Czech Republic, Your2Cents Online Opinion Panel p. 112
 Denmark, Common Knowledge Research Services p. 90
 Denmark, Your2Cents Online Opinion Panel p. 112
 e-Rewards Business to Business Online Panel, e-Rewards Market Research p. 94
 e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
 e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample B2B Panel (U.S./Canada), eSample Solutions p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 Expert DecisionMaker Panels, DM2-Decision Maker® p. 92
 Finland, Common Knowledge Research Services p. 90
 Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 94
 France, Common Knowledge Research Services p. 90
 France, Your2Cents Online Opinion Panel p. 112
 Germany, Common Knowledge Research Services p. 90
 Germany, Your2Cents Online Opinion Panel p. 112
 GMI Consumer Panel, GMI (Global Market Insight, Inc.) p. 96
 Greece, Common Knowledge Research Services p. 90
 Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
 InterfaceAsia B2B / IT, InterfaceAsia p. 98
 Ireland, Common Knowledge Research Services p. 90
 Ireland, Your2Cents Online Opinion Panel p. 112
 mo'web GmbH Medical Panel, mo'web GmbH p. 102
 National Database - USA, Shiffrin-Hayworth p. 108
 Netherlands, Common Knowledge Research Services p. 90
 Netherlands, Your2Cents Online Opinion Panel p. 112
 Norway, Common Knowledge Research Services p. 90
 Norway, Your2Cents Online Opinion Panel p. 112
 Poland, Common Knowledge Research Services p. 90
 Poland, Your2Cents Online Opinion Panel p. 112
 Portugal, Common Knowledge Research Services p. 90
 Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 RNB Research Consumer Panel, RNB Research: Fieldwork Specialist for India p. 107
 SurveySavvy, Luth Research p. 100
 SurveySpot.com (USA), Survey Sampling International p. 108
 Sweden, Common Knowledge Research Services p. 90
 Sweden, Your2Cents Online Opinion Panel p. 112
 Switzerland, Common Knowledge Research Services p. 90
 Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels - Western Europe, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110

Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 TNS NFO Occupation & Industry Panel, TNS p. 110
 United States, Common Knowledge Research Services p. 90
 United States, Your2Cents Online Opinion Panel p. 112
 ZoomPanel, MarketTools, Inc. p. 100

Middle-Eastern

American Consumer Opinion®, Decision Analyst, Inc. p. 92
 Austria, Common Knowledge Research Services p. 90
 Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
 Belgium, Common Knowledge Research Services p. 90
 Belgium, Your2Cents Online Opinion Panel p. 112
 Consumer Directions, KL Communications, Inc. p. 98
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 Czech Republic, Common Knowledge Research Services p. 90
 Czech Republic, Your2Cents Online Opinion Panel p. 112
 Denmark, Common Knowledge Research Services p. 90
 Denmark, Your2Cents Online Opinion Panel p. 112
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample Speciality Panels, eSample Solutions p. 94
 eSample Youth & Teens, eSample Solutions p. 94
 Finland, Common Knowledge Research Services p. 90
 Finland, Your2Cents Online Opinion Panel p. 112
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 94
 Focus World Ethnic Panel, Focus World International, Inc. p. 94
 France, Common Knowledge Research Services p. 90
 France, Your2Cents Online Opinion Panel p. 112
 Germany, Common Knowledge Research Services p. 90
 Germany, Your2Cents Online Opinion Panel p. 112
 GMI Consumer Panel, GMI (Global Market Insight, Inc.) p. 96
 Greece, Common Knowledge Research Services p. 90
 Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
 Ireland, Common Knowledge Research Services p. 90
 Ireland, Your2Cents Online Opinion Panel p. 112
 Maktoob Research Panel, Maktoob Research p. 100
 Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
 Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
 Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
 Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 102
 Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
 Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 National Database - USA, Shiffrin-Hayworth p. 108
 Netherlands, Common Knowledge Research Services p. 90
 Netherlands, Your2Cents Online Opinion Panel p. 112
 Norway, Common Knowledge Research Services p. 90
 Norway, Your2Cents Online Opinion Panel p. 112
 Poland, Common Knowledge Research Services p. 90
 Poland, Your2Cents Online Opinion Panel p. 112
 Portugal, Common Knowledge Research Services p. 90
 Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 SurveySavvy, Luth Research p. 100
 Sweden, Common Knowledge Research Services p. 90
 Sweden, Your2Cents Online Opinion Panel p. 112
 Switzerland, Common Knowledge Research Services p. 90
 Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 TSN Ethnic Panel, The Sample Network p. 108
 United Kingdom, Common Knowledge Research Services p. 90
 United Kingdom, Your2Cents Online Opinion Panel p. 112
 United States, Common Knowledge Research Services p. 90
 United States, Your2Cents Online Opinion Panel p. 112
 www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Mothers

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 88
 American Consumer Opinion®, Decision Analyst, Inc. p. 92
 AMR Interactive Consumer Panel, AMR Interactive p. 88
 Austria, Common Knowledge Research Services p. 90
 Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response International Consumer, Authentic Response p. 88
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
 Belgium, Common Knowledge Research Services p. 90
 Belgium, Your2Cents Online Opinion Panel p. 112
 Berenhaus Consumer Panels, Berenhaus Research Solutions, LLC p. 88

- Canadian Consumer Panel, ResearchByNet p. 106
 Childresearch.com Panel, ChildResearch.com p. 90
 ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 Consumer Link Concept Development, Insight Counts p. 98
 Consumer Link Consumer Research, Insight Counts p. 98
 Consumer Link Customer Satisfaction, Insight Counts p. 98
 Consumer Link Ethnographic Research, Insight Counts p. 98
 Consumer Link Focus Groups, Insight Counts p. 98
 Consumer Link Home Use Tests, Insight Counts p. 98
 Consumer Link Product Testing Research, Insight Counts p. 98
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 CP Research Consumer Database, CPRResearch Group, Inc. p. 91
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Cross-Tab Borderless Access - India Consumer Panel, Cross-Tab Marketing Services p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
 Datatelligence Online, Datatelligence Online p. 91
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
 DRI Consumer Panel, Digital Research, Inc. p. 92
 E-Poll Consumer Panel, E-Poll Market Research p. 92
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards Consumer Ailments Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 94
 eSample Hispanics, eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
Esearch Children/Teens Panel, Esearch.com, Inc. p. 94
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 94
 Focus World Ethnic Panel, Focus World International, Inc. p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
 GLA Int'l Online household panel in Japan, G.L.A. Int'l Marketing & Research Consultancy p. 94
 GLA Retail flyer/discount coupon monitoring in Japan, G.L.A. Int'l Marketing & Research Consultancy p. 94
GMI Consumer Panel, GMI (Global Market Insight, Inc.) p. 96
GMI Prenatal/New Parent Panel, GMI (Global Market Insight, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
Greenfield Online Moms & Babies Panel, Greenfield Online p. 97
 Harris Poll Online, Harris Interactive® p. 98
 IDOP (Interactive Dynamic Online Panel), MediaTransfer AG Netresearch & Consulting p. 102
Interface Asia Consumer, InterfaceAsia p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
Mindfield Mothers - Children Panel, Mindfield Online Internet Panels p. 102
Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 Momconnection.com, Resource Systems Group, Inc. p. 107
 mo'web GmbH Consumer Panel, mo'web GmbH p. 102
 National Database - USA, Shifrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
 NRN Opinion Club, National Research Network - Chicago p. 102
Opinion Place, DMS p. 92
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
ReRez Consumer Panel, ReRez p. 106
Research Now Australian Online Panel, Research Now - New York p. 106
Research Now French Online Panel, Research Now - New York p. 106
Research Now German Online Panel, Research Now - New York p. 106
Research Now Irish Online Panel, Research Now - New York p. 106
Research Now Italian Online Panel, Research Now - New York p. 106
Research Now UK Online Panel, Research Now - New York p. 106
 Resolution Research Consumers, Resolution Research & Marketing, Inc.® p. 106
 RNB Research Consumer Panel, RNB Research: Fieldwork Specialist for India p. 107
 SmartPanel of Growing Families, FGI Research p. 94
 Southern Solutions Baby Boomer, Southern Solutions p. 108
 Sparks® Creative Consumers, Murphy Marketing Research/TrendTown p. 102
 SpectraCom Research Panel, SpectraCom, Inc. p. 108
 Survey Exchange Panel, Cint USA p. 90
SurveySavvy, Luth Research p. 100
SurveySpot.com (USA), Survey Sampling International p. 108
SurveySpree, DMS p. 92
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 Synovate Voice of the Hispanic Family, Synovate p. 110
 The Buzz, Synovate - Perth p. 110
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
 Viewpoint Forum, MarketVision Research® p. 100
www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Mothers-Expectant

- American Consumer Opinion®, Decision Analyst, Inc. p. 92**
Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response International Consumer, Authentic Response p. 88
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
 ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 Consumer Link Concept Development, Insight Counts p. 98
 Consumer Link Consumer Research, Insight Counts p. 98
 Consumer Link Customer Satisfaction, Insight Counts p. 98
 Consumer Link Ethnographic Research, Insight Counts p. 98
 Consumer Link Focus Groups, Insight Counts p. 98
 Consumer Link Home Use Tests, Insight Counts p. 98
 Consumer Link Product Testing Research, Insight Counts p. 98
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 CP Research Consumer Database, CPRResearch Group, Inc. p. 91
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
 Datatelligence Online, Datatelligence Online p. 91
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
e-Rewards Consumer Ailments Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 94
 eSample Hispanics, eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 94
 Focus World Ethnic Panel, Focus World International, Inc. p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
GMI Consumer Panel, GMI (Global Market Insight, Inc.) p. 96
GMI Prenatal/New Parent Panel, GMI (Global Market Insight, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
Greenfield Online Moms & Babies Panel, Greenfield Online p. 97
 Harris Poll Online, Harris Interactive® p. 98
 IDOP (Interactive Dynamic Online Panel), MediaTransfer AG Netresearch & Consulting p. 102
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
Mindfield Mothers - Children Panel, Mindfield Online Internet Panels p. 102
Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 Momconnection.com, Resource Systems Group, Inc. p. 107
 mo'web GmbH Consumer Panel, mo'web GmbH p. 102
 National Database - USA, Shifrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
 NRN Opinion Club, National Research Network - Chicago p. 102
Opinion Place, DMS p. 92
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112

Poland, Your2Cents Online Opinion Panel p. 112
 Portugal, Common Knowledge Research Services p. 90
 Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 Research Now Australian Online Panel, Research Now - New York p. 106
 RNB Research Physicians Panel, RNB Research: Fieldwork Specialist for India p. 107
 Sparks® Creative Consumers, Murphy Marketing Research/TrendTown p. 102
 Surveyspot.com (USA), Survey Sampling International p. 108
 SurveySpree, DMS p. 92
 Sweden, Common Knowledge Research Services p. 90
 Sweden, Your2Cents Online Opinion Panel p. 112
 Switzerland, Common Knowledge Research Services p. 90
 Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 Synovate Voice of the Hispanic Family, Synovate p. 110
 The Buzz, Synovate - Perth p. 110
 TNS NFO Baby Panel, TNS p. 110
 United States, Common Knowledge Research Services p. 90
 United States, Your2Cents Online Opinion Panel p. 112
 Viewpoint Forum, MarketVision Research® p. 100
 www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Native American

American Consumer Opinion®, Decision Analyst, Inc. p. 92
 Austria, Common Knowledge Research Services p. 90
 Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response Global B2B Panel, Authentic Response p. 88
 Authentic Response International Consumer, Authentic Response p. 88
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
 Belgium, Common Knowledge Research Services p. 90
 Belgium, Your2Cents Online Opinion Panel p. 112
 ClickIQ Consumer Panel, ClickIQ p. 90
 Consumer Directions, KL Communications, Inc. p. 98
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 Czech Republic, Common Knowledge Research Services p. 90
 Czech Republic, Your2Cents Online Opinion Panel p. 112
 Denmark, Common Knowledge Research Services p. 90
 Denmark, Your2Cents Online Opinion Panel p. 112
 e-Rewards Automotive Online Panel, e-Rewards Market Research p. 94
 e-Rewards Consumer Ailments Online Panel, e-Rewards Market Research p. 94
 e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 94
 eSample Speciality Panels, eSample Solutions p. 94
 eSample Youth & Teens, eSample Solutions p. 94
 Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
 Finland, Common Knowledge Research Services p. 90
 Finland, Your2Cents Online Opinion Panel p. 112
 France, Common Knowledge Research Services p. 90
 France, Your2Cents Online Opinion Panel p. 112
 Germany, Common Knowledge Research Services p. 90
 Germany, Your2Cents Online Opinion Panel p. 112
 GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
 Greece, Common Knowledge Research Services p. 90
 Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
 Ireland, Common Knowledge Research Services p. 90
 Ireland, Your2Cents Online Opinion Panel p. 112
 Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
 Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
 Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
 Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 102
 Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
 Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 National Database - USA, Shifrin-Hayworth p. 108
 Netherlands, Common Knowledge Research Services p. 90
 Netherlands, Your2Cents Online Opinion Panel p. 112
 Norway, Common Knowledge Research Services p. 90
 Norway, Your2Cents Online Opinion Panel p. 112
 Poland, Common Knowledge Research Services p. 90
 Poland, Your2Cents Online Opinion Panel p. 112
 Portugal, Common Knowledge Research Services p. 90
 Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 Survey Exchange Panel, Cint USA p. 90
 Surveyspot.com (USA), Survey Sampling International p. 108
 Sweden, Common Knowledge Research Services p. 90

Sweden, Your2Cents Online Opinion Panel p. 112
 Switzerland, Common Knowledge Research Services p. 90
 Switzerland, Your2Cents Online Opinion Panel p. 112
 United States, Common Knowledge Research Services p. 90
 United States, Your2Cents Online Opinion Panel p. 112
 ZoomPanel, MarketTools, Inc. p. 100

Nurses

all global Online, all global p. 88
 all global Palliative Care Panel, all global p. 88
 Anaesthetists & Critical Care Nurses Panel, Creative Marketing Research Ltd. p. 91
 Austria, Common Knowledge Research Services p. 90
 Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response Global B2B Panel, Authentic Response p. 88
 Belgium, Common Knowledge Research Services p. 90
 Belgium, Your2Cents Online Opinion Panel p. 112
 Berenhaut B2B Panels, Berenhaut Research Solutions, LLC p. 88
 ClickIQ Consumer Panel, ClickIQ p. 90
 Consumer Directions, KL Communications, Inc. p. 98
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 CPRResearch Business Database, CPRResearch Group, Inc. p. 91
 Czech Republic, Common Knowledge Research Services p. 90
 Czech Republic, Your2Cents Online Opinion Panel p. 112
 Denmark, Common Knowledge Research Services p. 90
 Denmark, Your2Cents Online Opinion Panel p. 112
 Diabetes Nurse Educators/CDE's Panel, Creative Marketing Research Ltd. p. 91
 Diagnostics Plus Healthcare Panels, Diagnostics Plus, Inc. p. 92
 e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
 e-Rewards Healthcare Professionals Online Panel, e-Rewards Market Research p. 94
 e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample B2B Panel (U.S./Canada), eSample Solutions p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample Medical Professionals Panel (U.S./Canada), eSample Solutions p. 94
 Finland, Common Knowledge Research Services p. 90
 Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 94
 France, Common Knowledge Research Services p. 90
 France, Your2Cents Online Opinion Panel p. 112
 Germany, Common Knowledge Research Services p. 90
 Germany, Your2Cents Online Opinion Panel p. 112
 GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
 Greece, Common Knowledge Research Services p. 90
 Greece, Your2Cents Online Opinion Panel p. 112
 Greenfield Online Physicians Panel, Greenfield Online p. 97
 Harris Poll Online, Harris Interactive® p. 98
 Health Insights™, Market Insight, Inc. p. 100
 Healthcare Professionals Worldwide, Medimix International p. 102
 IDOP (Interactive Dynamic Online Panel), MediaTransfer AG Netresearch & Consulting p. 102
 InterfaceAsia Medical (Physician), InterfaceAsia p. 98
 Ireland, Common Knowledge Research Services p. 90
 Ireland, Your2Cents Online Opinion Panel p. 112
 Italy, Common Knowledge Research Services p. 90
 Italy, Your2Cents Online Opinion Panel p. 112
 JRA Healthcare Professionals Panel, JRA: Global Healthcare Research Services p. 98
 Medical Advisory Board, Decision Analyst, Inc. p. 92
 Mindfield Physician Panel, Mindfield Online Internet Panels p. 102
 National Database - USA, Shifrin-Hayworth p. 108
 Netherlands, Common Knowledge Research Services p. 90
 Netherlands, Your2Cents Online Opinion Panel p. 112
 Norway, Common Knowledge Research Services p. 90
 Norway, Your2Cents Online Opinion Panel p. 112
 PharmaField Research, Consumer Research Centre Ltd. p. 90
 Physicians Consulting Network, Physicians Consulting Network p. 105
 Poland, Common Knowledge Research Services p. 90
 Poland, Your2Cents Online Opinion Panel p. 112
 Portugal, Common Knowledge Research Services p. 90
 Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
 Resolution Research Medical, Resolution Research & Marketing, Inc.® p. 106
 Ricca Group Allied Health Professionals, Ricca Group, Inc. p. 107
 RNB Research Physicians Panel, RNB Research: Fieldwork Specialist for India p. 107
 RONIN Healthcare International Panel, RONIN Focus p. 107
 Spain, Common Knowledge Research Services p. 90
 Spain, Your2Cents Online Opinion Panel p. 112
 Specialists Respiratory Nurses Panel, Creative Marketing Research Ltd. p. 91
 SurveySavvy, Luth Research p. 100
 Surveyspot.com (USA), Survey Sampling International p. 108
 Sweden, Common Knowledge Research Services p. 90
 Sweden, Your2Cents Online Opinion Panel p. 112
 Switzerland, Common Knowledge Research Services p. 90
 Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110

Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
TSN Healthcare Panel, The Sample Network p. 108
United Kingdom, Common Knowledge Research Services p. 90
United Kingdom, Your2Cents Online Opinion Panel p. 112
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
WorldOne's Global Nurse Panel, WorldOne Research p. 112
 ZoomPanel, MarketTools, Inc. p. 100

Parents

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 88
American Consumer Opinion®, Decision Analyst, Inc. p. 92
 AMR Interactive Consumer Panel, AMR Interactive p. 88
Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response International Consumer, Authentic Response p. 88
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
 Berenhaus Consumer Panels, Berenhaus Research Solutions, LLC p. 88
 Canadian Consumer Panel, ResearchByNet p. 106
 Childresearch.com Panel, ChildResearch.com p. 90
 ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 Consumer Link Concept Development, Insight Counts p. 98
 Consumer Link Consumer Research, Insight Counts p. 98
 Consumer Link Customer Satisfaction, Insight Counts p. 98
 Consumer Link Ethnographic Research, Insight Counts p. 98
 Consumer Link Focus Groups, Insight Counts p. 98
 Consumer Link Home Use Tests, Insight Counts p. 98
 Consumer Link Product Testing Research, Insight Counts p. 98
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 CP Research Consumer Database, CPRResearch Group, Inc. p. 91
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Cross-Tab Borderless Access - India Consumer Panel, Cross-Tab Marketing Services p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
 DRI Consumer Panel, Digital Research, Inc. p. 92
 E-Poll Consumer Panel, E-Poll Market Research p. 92
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards Consumer Ailments Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 94
 eSample Hispanics, eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
Esearch Children/Teens Panel, Esearch.com, Inc. p. 94
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
 Gallup Panel, The, The Gallup Panel p. 94
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
 GLA Int'l Online household panel in Japan, G.L.A. Int'l Marketing & Research Consultancy p. 94
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
GMI Prenatal/New Parent Panel, GMI (Global Market Insite, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
 IDOP (Interactive Dynamic Online Panel), MediaTransfer AG Netresearch & Consulting p. 102
Interface Asia Consumer, InterfaceAsia p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
Italy, Common Knowledge Research Services p. 90
Italy, Your2Cents Online Opinion Panel p. 112
Mindfield Electronics & Gaming Panel, Mindfield Online Internet Panels p. 102
Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
Mindfield Homeowner & Lawncare Panel, Mindfield Online Internet Panels p. 102
Mindfield Mothers - Children Panel, Mindfield Online Internet Panels p. 102

Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 102
Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 mo'web GmbH Consumer Panel, mo'web GmbH p. 102
 National Database - USA, Shiffrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
Opinion Place, DMS p. 92
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
Research Now Australian Online Panel, Research Now - New York p. 106
Research Now Austrian Online Panel, Research Now - New York p. 106
Research Now Brazil Online Panel, Research Now - New York p. 106
Research Now Canada Online Panel, Research Now - New York p. 106
Research Now Czech Online Panel, Research Now - New York p. 106
Research Now Danish Online Panel, Research Now - New York p. 106
Research Now Dutch Online Panel, Research Now - New York p. 106
Research Now Finnish Online Panel, Research Now - New York p. 106
Research Now French Online Panel, Research Now - New York p. 106
Research Now German Online Panel, Research Now - New York p. 106
Research Now Greek Online Panel, Research Now - New York p. 106
Research Now Hungarian Online Panel, Research Now - New York p. 106
Research Now Irish Online Panel, Research Now - New York p. 106
Research Now Italian Online Panel, Research Now - New York p. 106
Research Now New Zealand Online Panel, Research Now - New York p. 106
Research Now Norwegian Online Panel, Research Now - New York p. 106
Research Now Polish Online Panel, Research Now - New York p. 106
Research Now Portuguese Online Panel, Research Now - New York p. 106
Research Now Russian Online Panel, Research Now - New York p. 106
Research Now Spanish Online Panel, Research Now - New York p. 106
Research Now Swedish Online Panel, Research Now - New York p. 106
Research Now Switzerland Online Panel, Research Now - New York p. 106
Research Now UK Online Panel, Research Now - New York p. 106
Research Now USA Online Panel, Research Now - New York p. 106
 RNB Research Consumer Panel, RNB Research: Fieldwork Specialist for India p. 107
 Southern Solutions Baby Boomer, Southern Solutions p. 108
 Southern Solutions Generation X, Southern Solutions p. 108
Spain, Common Knowledge Research Services p. 90
Spain, Your2Cents Online Opinion Panel p. 112
 Sparks® Creative Consumers, Murphy Marketing Research/TrendTown p. 102
 SpectraCom Research Panel, SpectraCom, Inc. p. 108
 Survey Exchange Panel, Cint USA p. 90
SurveySavvy, Luth Research p. 100
SurveySpot.com (USA), Survey Sampling International p. 108
SurveySpree, DMS p. 92
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 TNS NFO Baby Panel, TNS p. 110
United Kingdom, Common Knowledge Research Services p. 90
United Kingdom, Your2Cents Online Opinion Panel p. 112
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
 Viewpoint Forum, MarketVision Research® p. 100
www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Pharmacists

all global Online, all global p. 88
 all global Palliative Care Panel, all global p. 88
 Berenhaus B2B Panels, Berenhaus Research Solutions, LLC p. 88
Consumer Directions, KL Communications, Inc. p. 98
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 CPRResearch Business Database, CPRResearch Group, Inc. p. 91
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards Healthcare Professionals Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample B2B Panel (U.S./Canada), eSample Solutions p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94

eSample Medical Professionals Panel (U.S./Canada), eSample Solutions p. 94
 Expert DecisionMaker Panels, DM2-Decision Maker® p. 92
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 94
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
GMI Physician Panel, GMI (Global Market Insite, Inc.) p. 96
Greenfield Online Physicians Panel, Greenfield Online p. 97
 Harris Poll Online, Harris Interactive® p. 98
 Health Insights™, Market Insight, Inc. p. 100
 Healthcare Professionals Worldwide, Medimix International p. 102
InterfaceAsia Medical (Physician), InterfaceAsia p. 98
JRA Healthcare Professionals Panel, JRA: Global Healthcare Research Services p. 98
Medical Advisory Board, Decision Analyst, Inc. p. 92
Mindfield Physician Panel, Mindfield Online Internet Panels p. 102
 mo'web GmbH Medical Panel, mo'web GmbH p. 102
 National Database - USA, Shifrin-Hayworth p. 108
 Pharmacare, NovaTest p. 102
 Pharmacists Panel, Creative Marketing Research Ltd. p. 91
 PharmaField Research, Consumer Research Centre Ltd. p. 90
Physicians Consulting Network, Physicians Consulting Network p. 105
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
Research Now USA Online Panel, Research Now - New York p. 106
Ricca Group Allied Health Professionals, Ricca Group, Inc. p. 107
 RNB Research Physicians Panel, RNB Research: Fieldwork Specialist for India p. 107
 RONIN Healthcare International Panel, RONIN Focus p. 107
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels - Western Europe, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 TNS NFO Occupation & Industry Panel, TNS p. 110
TSN Healthcare Panel, The Sample Network p. 108
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
WorldOne's Global Pharmacists Panel, WorldOne Research p. 112
www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Physicians

all global Online, all global p. 88
 all global Palliative Care Panel, all global p. 88
 Authentic Response Global B2B Panel, Authentic Response p. 88
 Berenhaus B2B Panels, Berenhaus Research Solutions, LLC p. 88
 Canadian Viewpoint Physician Panel, Canadian Viewpoint, Inc. p. 90
 ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 CPRResearch Business Database, CPRResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Diagnostics Plus Healthcare Panels, Diagnostics Plus, Inc. p. 92
 DoctorDirectory Physician Panel, DoctorDirectory.com, Inc. p. 92
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards Healthcare Professionals Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample B2B Panel (U.S./Canada), eSample Solutions p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample Medical Professionals Panel (U.S./Canada), eSample Solutions p. 94
 Expert DecisionMaker Panels, DM2-Decision Maker® p. 92
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 94
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
GMI Physician Panel, GMI (Global Market Insite, Inc.) p. 96
Greenfield Online Physicians Panel, Greenfield Online p. 97
 Harris Interactive Physician Panel, Harris Interactive® p. 98
 Harris Poll Online, Harris Interactive® p. 98
 Health Insights™, Market Insight, Inc. p. 100
 Healthcare Professionals Worldwide, Medimix International p. 102
 Healthtracker, Synovate New Zealand-Auckland p. 110
InterfaceAsia Medical (Physician), InterfaceAsia p. 98
JRA Physicians Panel, JRA: Global Healthcare Research Services p. 98
 MediTrend: Physician Panel, Untiedt Research GmbH p. 110
Mindfield Physician Panel, Mindfield Online Internet Panels p. 102
 mo'web GmbH Medical Panel, mo'web GmbH p. 102
 National Database - USA, Shifrin-Hayworth p. 108
 Pharmacare, NovaTest p. 102
 PharmaField Research, Consumer Research Centre Ltd. p. 90
Physicians' Advisory Council, Decision Analyst, Inc. p. 92
Physicians Consulting Network, Physicians Consulting Network p. 105
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
ReRez Physicians Panel, ReRez p. 106
 Resolution Research Medical, Resolution Research & Marketing, Inc.® p. 106

Ricca Group Physicians, Ricca Group, Inc. p. 107
 RNB Research Physicians Panel, RNB Research: Fieldwork Specialist for India p. 107
 RONIN Healthcare International Panel, RONIN Focus p. 107
SurveySavvy, Luth Research p. 100
SurveySpot.com (USA), Survey Sampling International p. 108
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels - Western Europe, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 TNS NFO Occupation & Industry Panel, TNS p. 110
TSN Healthcare Panel, The Sample Network p. 108
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
WorldOne's Global Physician Panel, WorldOne Research p. 112
 ZoomPanel, MarketTools, Inc. p. 100

Seniors/Mature

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 88
American Consumer Opinion®, Decision Analyst, Inc. p. 92
 AMR Interactive Consumer Panel, AMR Interactive p. 88
Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response International Consumer, Authentic Response p. 88
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
 Berenhaus Consumer Panels, Berenhaus Research Solutions, LLC p. 88
 Boomers & Their Elders, Strategic Directions Group, Inc. p. 108
 Canadian Consumer Panel, ResearchByNet p. 106
 ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 Consumer Link Concept Development, Insight Counts p. 98
 Consumer Link Consumer Research, Insight Counts p. 98
 Consumer Link Customer Satisfaction, Insight Counts p. 98
 Consumer Link Ethnographic Research, Insight Counts p. 98
 Consumer Link Focus Groups, Insight Counts p. 98
 Consumer Link Home Use Tests, Insight Counts p. 98
 Consumer Link Product Testing Research, Insight Counts p. 98
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 CP Research Consumer Database, CPRResearch Group, Inc. p. 91
 CPRResearch Blended Web Panel, CPRResearch Group, Inc. p. 91
 Cross-Tab Borderless Access - India B2B Panel, Cross-Tab Marketing Services p. 91
 Cross-Tab Borderless Access - India Consumer Panel, Cross-Tab Marketing Services p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
e-Rewards Automotive Online Panel, e-Rewards Market Research p. 94
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards Consumer Ailments Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample Speciality Panels, eSample Solutions p. 94
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus Forward Online Panel, Focus Forward p. 94
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 94
 Focus World Ethnic Panel, Focus World International, Inc. p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
 Gallup Panel, The, The Gallup Panel p. 94
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
 Harris Poll Online, Harris Interactive® p. 98
 IDOP (Interactive Dynamic Online Panel), MediaTransfer AG Netresearch & Consulting p. 102
Interface Asia Consumer, InterfaceAsia p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
Italy, Common Knowledge Research Services p. 90
Italy, Your2Cents Online Opinion Panel p. 112
Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102

Mindfield Homeowner & Lawncare Panel, Mindfield Online Internet Panels p. 102
Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 102
Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 mo'web GmbH Consumer Panel, mo'web GmbH p. 102
 National Database - USA, Shifrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
 NRN Opinion Club, National Research Network - Chicago p. 102
Opinion Place, DMS p. 92
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
ReRez Consumer Panel, ReRez p. 106
 RNB Research Consumer Panel, RNB Research: Fieldwork Specialist for India p. 107
 Southern Solutions Seniors, Southern Solutions p. 108
Spain, Common Knowledge Research Services p. 90
Spain, Your2Cents Online Opinion Panel p. 112
 Survey Exchange Panel, Cint USA p. 90
SurveySavvy, Luth Research p. 100
SurveySpot.com (USA), Survey Sampling International p. 108
SurveySpree, DMS p. 92
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels - Western Europe, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 Synovate Voice of the Hispanic Family, Synovate p. 110
 The Buzz, Synovate - Perth p. 110
United Kingdom, Common Knowledge Research Services p. 90
United Kingdom, Your2Cents Online Opinion Panel p. 112
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
 Viewpoint Forum, MarketVision Research® p. 100
www.planet-pulse.com, Pulse Group p. 106
 ZoomPanel, MarketTools, Inc. p. 100

Teens

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 88
American Consumer Opinion®, Decision Analyst, Inc. p. 92
 AMR Interactive Consumer Panel, AMR Interactive p. 88
Austria, Common Knowledge Research Services p. 90
Austria, Your2Cents Online Opinion Panel p. 112
 Authentic Response International Consumer, Authentic Response p. 88
 Authentic Response U.S. Consumer Panel, Authentic Response p. 88
Belgium, Common Knowledge Research Services p. 90
Belgium, Your2Cents Online Opinion Panel p. 112
 Berenhaus Consumer Panels, Berenhaus Research Solutions, LLC p. 88
 Canadian Consumer Panel, ResearchByNet p. 106
 Childresearch.com Panel, ChildResearch.com p. 90
 ClickIQ Consumer Panel, ClickIQ p. 90
Consumer Directions, KL Communications, Inc. p. 98
 Consumer Link Concept Development, Insight Counts p. 98
 Consumer Link Consumer Research, Insight Counts p. 98
 Consumer Link Customer Satisfaction, Insight Counts p. 98
 Consumer Link Ethnographic Research, Insight Counts p. 98
 Consumer Link Focus Groups, Insight Counts p. 98
 Consumer Link Home Use Tests, Insight Counts p. 98
 Consumer Link Product Testing Research, Insight Counts p. 98
 Consumer Research Panel, The, Consumer Research Centre Ltd. p. 90
 CPResearch Blended Web Panel, CPResearch Group, Inc. p. 91
Czech Republic, Common Knowledge Research Services p. 90
Czech Republic, Your2Cents Online Opinion Panel p. 112
Denmark, Common Knowledge Research Services p. 90
Denmark, Your2Cents Online Opinion Panel p. 112
 E-Poll Consumer Panel, E-Poll Market Research p. 92
e-Rewards Canada Online Panels, e-Rewards Market Research p. 94
e-Rewards Consumer Ailments Online Panel, e-Rewards Market Research p. 94
e-Rewards U.S. Online Panels, e-Rewards Market Research p. 94
e-Rewards U.Talk.Back Youth Opinion Panel, e-Rewards Market Research p. 94
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 94
 eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 94
 eSample Hispanics, eSample Solutions p. 94
 eSample International Panel (200+ Countries), eSample Solutions p. 94
 eSample Speciality Panels, eSample Solutions p. 94
 eSample Youth & Teens, eSample Solutions p. 94
Esearch Children/Teens Panel, Esearch.com, Inc. p. 94
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 94
Finland, Common Knowledge Research Services p. 90
Finland, Your2Cents Online Opinion Panel p. 112
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 94
 Focus World Ethnic Panel, Focus World International, Inc. p. 94
France, Common Knowledge Research Services p. 90
France, Your2Cents Online Opinion Panel p. 112
 Gallup Panel, The, The Gallup Panel p. 94
 GenX2Z.com, Anderson Analytics, LLC p. 88
Germany, Common Knowledge Research Services p. 90
Germany, Your2Cents Online Opinion Panel p. 112
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 96
GMI Youth Panel, GMI (Global Market Insite, Inc.) p. 96
Greece, Common Knowledge Research Services p. 90
Greece, Your2Cents Online Opinion Panel p. 112
Greenfield Online Teen Panel, Greenfield Online p. 97
 Harris Interactive Teen Panel, Harris Interactive® p. 98
 Harris Poll Online, Harris Interactive® p. 98
 IDOP (Interactive Dynamic Online Panel), MediaTransfer AG Netresearch & Consulting p. 102
Interface Asia Consumer, InterfaceAsia p. 98
Ireland, Common Knowledge Research Services p. 90
Ireland, Your2Cents Online Opinion Panel p. 112
Italy, Common Knowledge Research Services p. 90
Italy, Your2Cents Online Opinion Panel p. 112
 Kidscom Club, SpectraCom, Inc. p. 108
Mindfield Electronics & Gaming Panel, Mindfield Online Internet Panels p. 102
Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 102
Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 102
Mindfield Health & Beauty Aides Brand Panel, Mindfield Online Internet Panels p. 102
Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 102
Mindfield Teen Panel, Mindfield Online Internet Panels p. 102
Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 102
Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 102
 mo'web GmbH Consumer Panel, mo'web GmbH p. 102
 National Database - USA, Shifrin-Hayworth p. 108
Netherlands, Common Knowledge Research Services p. 90
Netherlands, Your2Cents Online Opinion Panel p. 112
Norway, Common Knowledge Research Services p. 90
Norway, Your2Cents Online Opinion Panel p. 112
 NRN Opinion Club, National Research Network - Chicago p. 102
Opinion Place, DMS p. 92
 People Panel - Consumer Panel, The, The People Panel p. 104
Poland, Common Knowledge Research Services p. 90
Poland, Your2Cents Online Opinion Panel p. 112
Portugal, Common Knowledge Research Services p. 90
Portugal, Your2Cents Online Opinion Panel p. 112
 Readers Panels - Publication Specific-Customised, Signet Research, Inc. p. 108
ReRez Consumer Panel, ReRez p. 106
 RNB Research Consumer Panel, RNB Research: Fieldwork Specialist for India p. 107
 Sample Czar Kids/Teens, Sample Czar, Inc. p. 108
 Southern Solutions Generation Y, Southern Solutions p. 108
Spain, Common Knowledge Research Services p. 90
Spain, Your2Cents Online Opinion Panel p. 112
SurveySavvy, Luth Research p. 100
SurveySpot.com (USA), Survey Sampling International p. 108
SurveySpree, DMS p. 92
Sweden, Common Knowledge Research Services p. 90
Sweden, Your2Cents Online Opinion Panel p. 112
Switzerland, Common Knowledge Research Services p. 90
Switzerland, Your2Cents Online Opinion Panel p. 112
 Synovate Automotive Panel, Synovate p. 110
 Synovate Financial Panel, Synovate p. 110
 Synovate Global Opinion Panels-North America, Synovate p. 110
 Synovate Health Conditions Panel, Synovate p. 110
 Synovate Technology Panel, Synovate p. 110
 Synovate Travel & Leisure Panel, Synovate p. 110
 Synovate Voice of the Hispanic Family, Synovate p. 110
 Teen Insight™, Decision Insight, Inc. p. 92
TeensEyes.com, C&R Research Services, Inc. p. 88
TSN Teen Panel, The Sample Network p. 108
United Kingdom, Common Knowledge Research Services p. 90
United Kingdom, Your2Cents Online Opinion Panel p. 112
United States, Common Knowledge Research Services p. 90
United States, Your2Cents Online Opinion Panel p. 112
 Viewpoint Forum, MarketVision Research® p. 100
www.planet-pulse.com, Pulse Group p. 106
 Youth ePanel, Survey.com p. 110
 ZoomPanel, MarketTools, Inc. p. 100

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Trade Talk

continued from page 129

An endless array

The theme of the 2008 ESOMAR Congress was, simply, “Frontiers” and many of the presenters worked off/commented on/explored that concept as it applies to marketing and marketing research, some with greater success than others. We are facing a new frontier – or maybe an endless array of them, if you want to consider each new potential market or each new potential advertising and marketing medium as a frontier.

While I respect and believe in the abilities of marketing research, I’ll temper the usual “research can save the world” tone that I strike in this space and refrain from suggesting that research is the only way to figure out how to successfully explore these new vistas.

Still, facing a customer landscape dotted with question marks (What products do they want? What is the best way to reach them? What messages will they respond to?) I can’t think of too many other, better ways to start exploring new (or even familiar) territory than by using

some form of research to open a dialog with the people you’d most like to market to.

That word – dialog – was one that I heard quite a bit from those on the dais. The analog in marketing is relationship marketing and while it’s certainly not realistic or even worthwhile to establish long-term, ongoing relationships with every research respondent, several of the presenters spoke of using methods that forge bonds with consumers. The hope is that by using research to get closer to your customers you not only demonstrate that you care about their needs and opinions but that you might also be able to elicit more honest, unvarnished feedback from them.

Creative minds

I’m still fearful that our world economy has become too interrelated, but listening to the enthusiastic researchers who shared their findings at the ESOMAR event at least made me feel that creative minds are at work, puzzling out solutions to evermore complex marketing and information issues. Rather than dooming us to failure, I think (I hope!) the fact that we are all in this together is what will end up ensuring our success. | Q

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A global economy, for good or ill

Seven years later, another crisis. While reflecting on my September trip to Montreal for the ESOMAR Congress, I realized that the last time I attended the organization's annual conference was in September 2001 in Rome, mere days after the 9/11 attacks.

Back then, while I and my fellow American attendees tried to concentrate on the business at hand, I recall that every conversation, no matter which topic it started on, eventually made its way to the attacks and their aftermath.

Fast-forward to Montreal for this year's gathering, where the talk of a world financial meltdown served as a backdrop.

In Rome, while there were countless expressions of sympathy, there was definitely a sense among our fellow conference attendees that this was something that had happened to "you Americans." (Back then it wasn't yet clear that Al Qaeda had more than just U.S. targets on its list.)

At Congress 2008, the talk changed from "you" to "we." Though much of the news about the financial disaster originated out of Washington, D.C., as elected officials debated the merits of the bailout, it was clear that the problem was a global one, as markets around the

world tanked and governments rushed to deal with a rash of financial institution failures.

Musing about all of this, my first thought was, being a superstitious type, that I am now afraid what might happen the next time I go to another ESOMAR Congress. The second was that the evidence mounts by the day that we truly live in a global economy.

Duh, you say, tell me something I don't know.

I hear you. But listening to the themes touched on by the various conference presenters, set against the cultural context of the dire pronouncements coming from the newspapers I read over breakfast and the cable networks I watched in my hotel room in the evenings, the oneworldness of it all suddenly slapped me in the face. And frankly it kind of terrified me and made me glad that global marketing isn't part of my job title. Because at the same time that the world economy is becoming one huge, inextricably-linked organism, markets and media are growing more and more fragmented.

Option anxiety

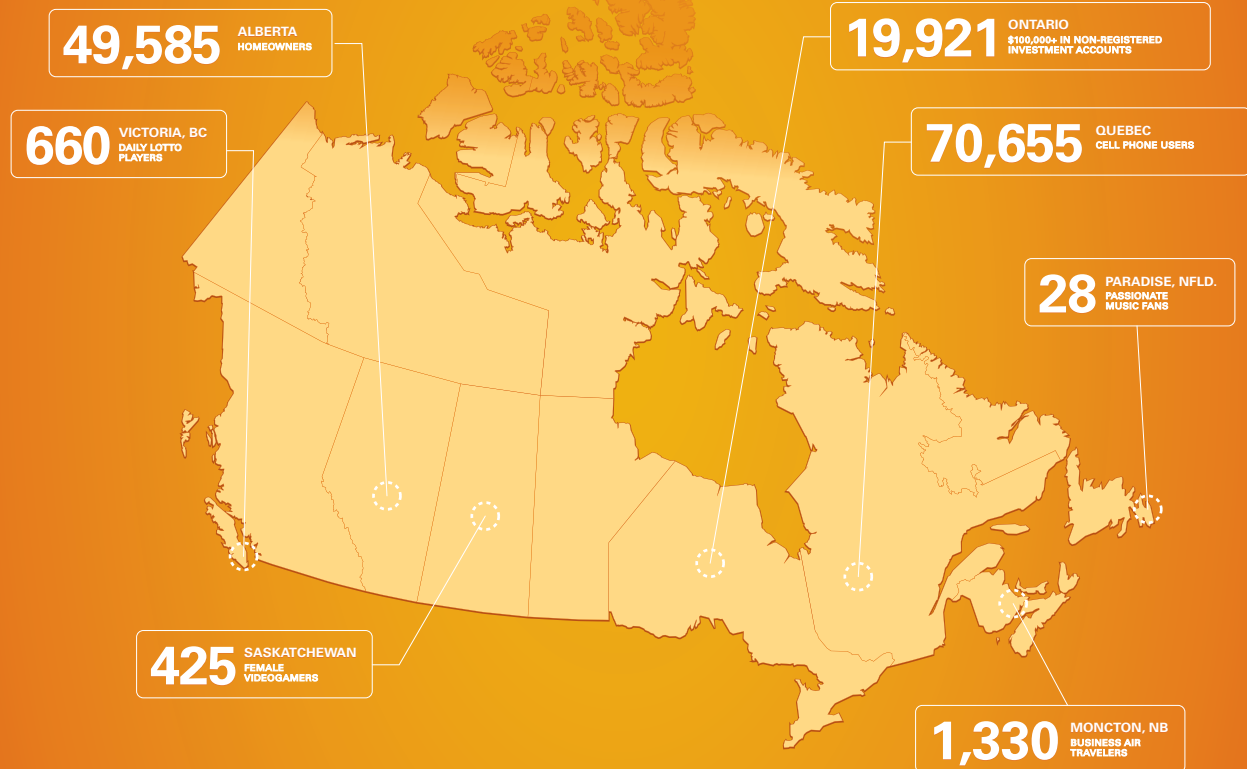
I recall decades ago jazz guitarist Pat Metheny, being asked why, as guitar synthesizers were rapidly gaining pop-

ularity, he had taken so long to finally make a record with one. He talked about the problem of option anxiety – the stress that he felt when being confronted with all of the millions of possible combinations of sonic colors and timbres and tones that electronic signal processing offered him. Things were much simpler when he could just plug in his trusty Gibson ES-175 and switch on the amp.

I imagine global brand marketers – and, really, marketers of almost any well-known product or service these days – are feeling the same kind of panic. The advent of Web-based and associated e-media (cell phones, e-mail, PDAs, etc.) and the decline of newspapers and the big three TV networks has exploded the mass media into a thousand (a million?) tiny pieces. At the same time, target markets are growing more and more fragmented and specialized. If you'd like to reach college students with your message, why bother with the cost of broadcasting a 30-second spot on a hit sitcom when you can use online ads and text messaging to narrowcast your way into the lives of your coveted consumers? The choices and possibilities are at once wonderfully and maddeningly limitless.

continued on p. 129

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