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NOVEMBER 2009

Marketing Research Review

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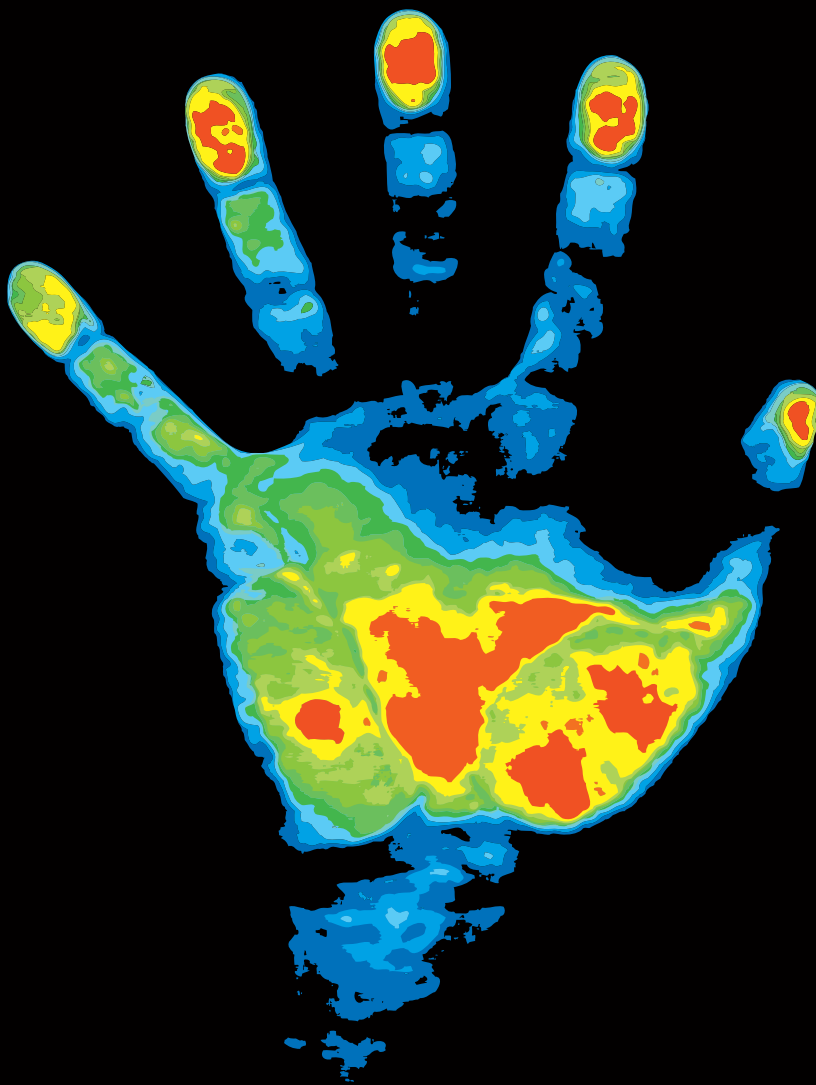
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Illustration by Jennifer Coppersmith

Publisher
Steve Quirk

Editor
Joseph Rydholm

Content Editor
Emily Goon

Production Manager
James Quirk

Directory Manager
Alice Davies

Advertising Sales
Evan Tweed, V.P. Sales
651-379-6200
evan@quirks.com

Lance Streff
651-379-6200
lance@quirks.com

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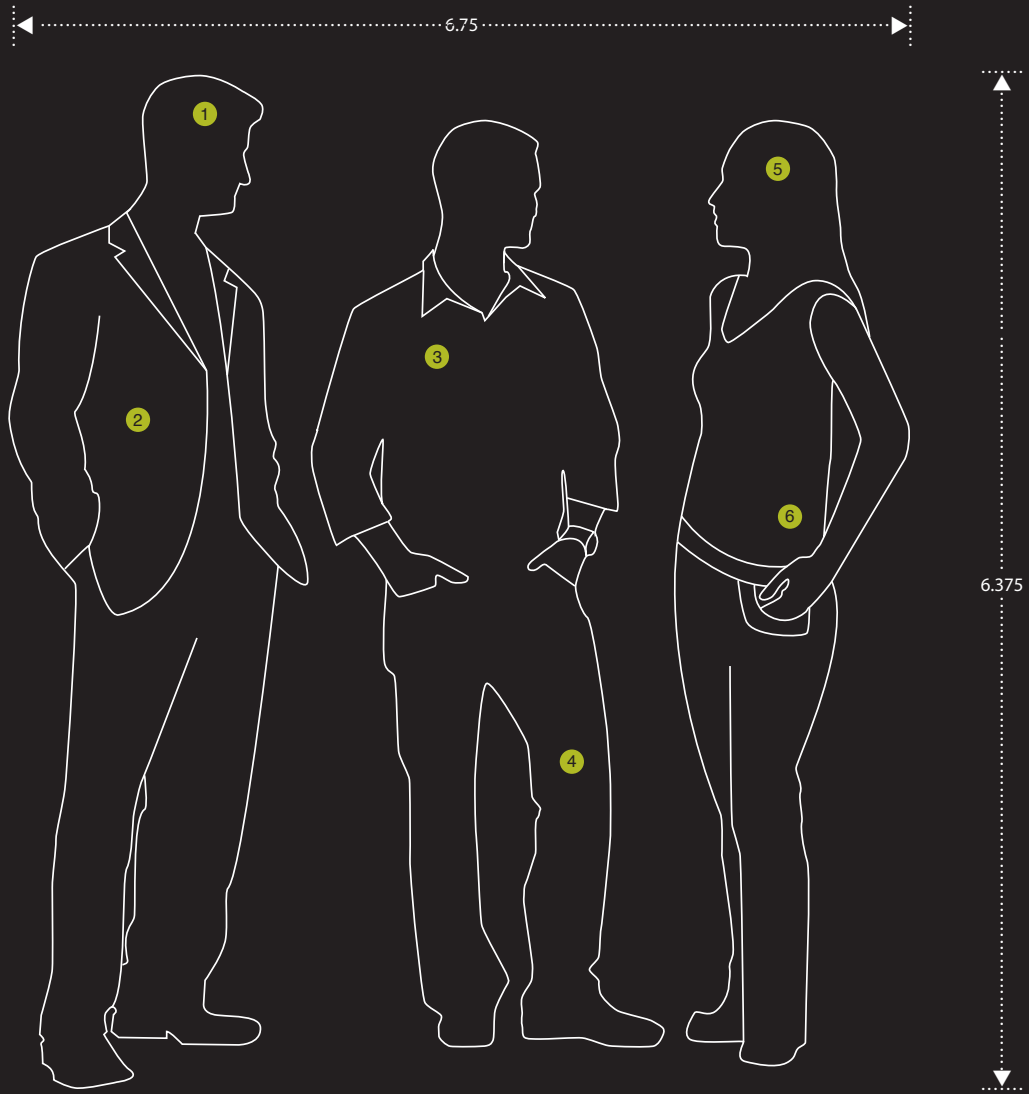
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in case you missed it...

news and notes on marketing and research



Men's underwear and the economy: the skinny on skivvies

Shampoo, toothpaste, socks and undies - all mainstays of recession-proof items, right? Not quite. In fact, the sale of men's underwear often correlates with the state of the economy. When times are good, boxer shorts, briefs, bikinis and, of course, the occasional thong hold steady sales, as they are - by the American standard definition - a necessity. But during times of severe financial strain, men will try to stretch the time between buying new pairs, causing underwear sales to fall, according to Ylan Q. Mui's August 31, 2009, article "Blue chip, white cotton: what underwear says about the economy," in *The Washington Post*.

"It's a prolonged purchase," said Marshal Cohen, senior analyst at Port Washington, N.Y., research company The NPD Group. "It's like trying to drive your car an extra 10,000 miles."

The growth in sales of men's underwear began to slow in 2008 as the recession took hold, according to Chicago research company Mintel. In 2009, sales are expected to fall 2.3 percent, the first drop since the company started collecting data in 2003. However, Mintel predicts that next year, men's underwear sales will fall by 0.5 percent, and a slowing of a decline can be a welcome step in the right direction.

According to Mintel, men buy an average of 3.4 pairs of underwear in a year. But from 2004 to 2008, the proportion of men buying single pairs at a time increased from 5 percent to 8 percent, while the share of men opting for packs of four or more fell slightly, from

68 to 66 percent - indicating that shoppers may be trying to save money by buying only when necessary.

Cohen said he hopes the recent positive signs in men's underwear will spill over into other need-based purchases. Shoppers may be reaching a point where their stuff is simply worn out, providing an incentive to return to the stores.

There are other telltale items analysts look to as economic status indicators, such as an increase in the prescriptions of antidepressants and sleep-aids, but nosing through the medicine cabinets isn't nearly as much fun as peeking into the underwear drawer.



Tokyo café puts product samples on the menu

Australian promotional space company Sample Labs has merged product testing with real-world business in Tokyo at Lcafé - a first-of-its-kind marketing café that operates just as any other trendy hangout spot for the young and affluent Japanese but that rewards customers with access to targeted sample and promotional products, according to Miho Inada's August 24, 2009, article, "Tokyo café targets trend makers," in the *Wall Street Journal*. Replacing the notion of a simulated store setup, registered customers, who spend their own legal tender on the usual hip coffee- and snack-bar fare, are given tokens that they can redeem at the sample bar to try new products.

To receive tokens, customers must register via mobile phone and provide personal information including age, birthday and marital status (nicknames and imprecise addresses acceptable). Lcafé opened in July 2009, and after less than two months had 2,000+ members. Registered members are given a bar code that shows up on their mobile phone, which serves as a membership ID and helps Sample Lab track who receives what samples. Sample Lab later questions members about items they tried, and those who answer the electronic survey are rewarded with extra tokens.

Faced with pressure to reduce costs amid a global economic downturn, Japanese advertisers are turning to targeted promotions like samples, and it is more affordable than television ads or glossy magazine spreads. Sample Lab estimates it costs about 150,000 yen (1,590) for displaying samples at the sample bar and distributing up to 1,500 items for two weeks. Collecting feedback on samples and analyzing it costs about 625,000 yen.

The Lcafé caters to Japanese women in their 20s and 30s; the ratio of female to male customers is 9-to-1. Among the companies peddling their products are Refresh Time, a vitamin-infused drink by House Wellness Foods Corp.; pretzel sticks with flavors such as cheese, apple or tomato; and assorted skin care products.

Free shipping, used wisely, could pay off

Frugal holiday shoppers will be happy to know that more and more retailers are looking into offering free shipping as an incentive to order from their online stores, but retailers need to carefully plan such promotions and be selective about when they offer deals and to whom the deals are offered, according to Free Shipping Report: Benchmark Data and Analysis for E-mail Marketers, a study from New York research company Experian CheetaMail.

The study found 70 percent of respondents across all industries had higher conversion rates on e-mails offering free shipping than on other types of marketing e-mails. Of that 70 percent, 78 percent saw increased transaction-to-click-rates (defined as the total number of transactions divided by the number of unique visitors clicking on the e-mail), and 47 percent had higher average order values in free shipping e-mails compared to other marketing e-mails.

To create the most profitable and successful free shipping e-mail campaign, Experian suggests that retailers:

Feature the right products. Free shipping on overstocked items tends to perform poorly.

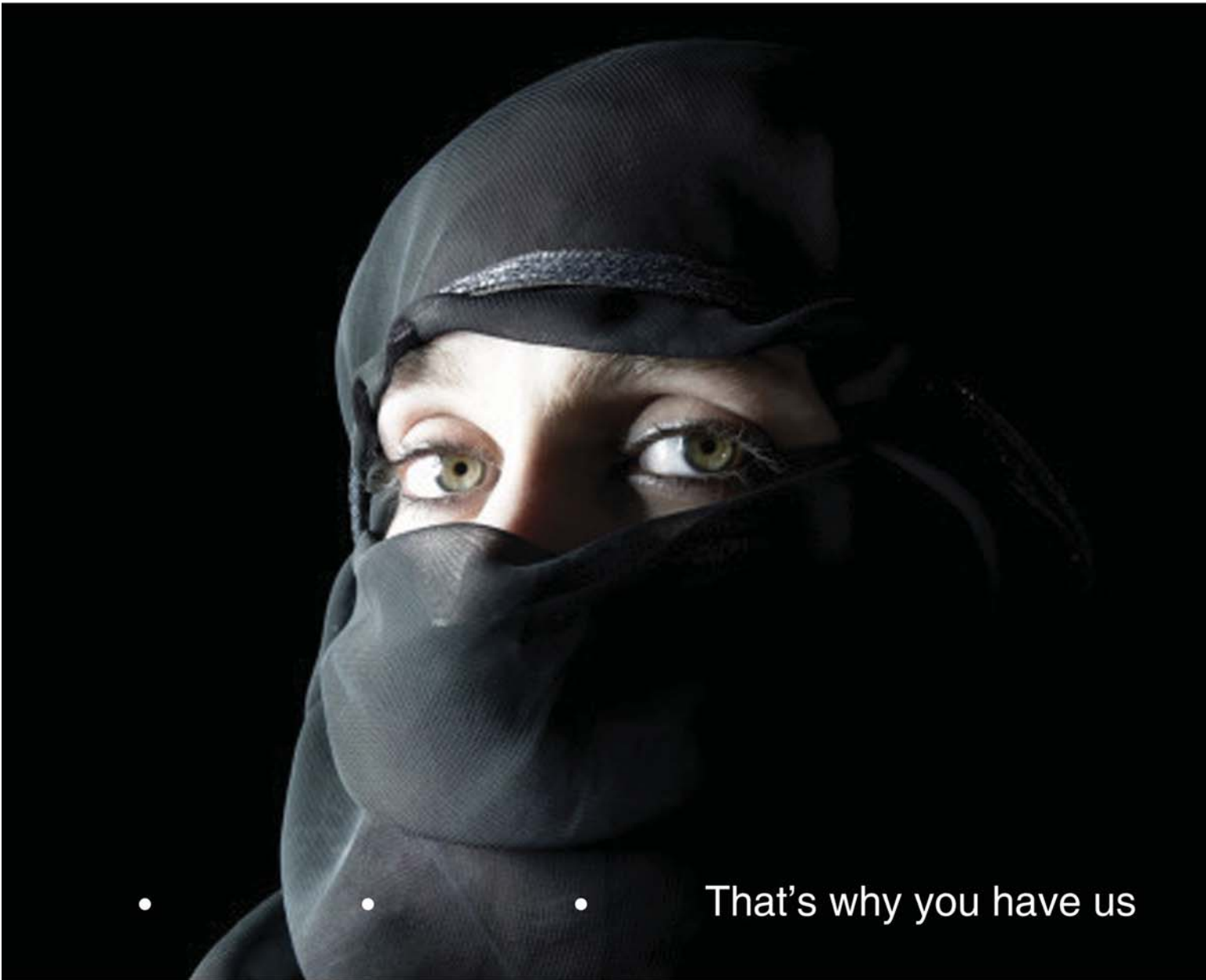
Limit free shipping offers. Constantly running free shipping offers may dilute their effectiveness.

Segment the e-mails. Divide the subscriber list into groups of customers based on their product interests, then offer those groups the products with free shipping.

Retailers may also look to the second annual Holiday Free Shipping Day, slated for Thursday, December 17, 2009, to generate traffic. Free Shipping Day represents the last possible 24-hour period when online shoppers can place their orders with guaranteed delivery by Christmas Eve and aims to extend the online holiday shopping season, which typically peaks in early December because consumers are concerned about their gift orders arriving to their intended destination in time for Christmas.

FreeShipping.org allows consumers to find online retailers that offer free shipping deals. For larger merchants, the event provides an additional forum to increase sales without having to draw customers into their physical locations. Some small online retailers set a single-day record for traffic because of their participation in 2008.

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Holiday shoppers less worried but still frugal

Perhaps two years of penny-pinching practice has prepared Americans for yet another holiday season in tough financial times because consumers are overall less concerned with the state of the economy and more prepared to take a strategic and savvy approach to holiday shopping – armed with detailed lists and a strict budget in mind. Only 18 percent of consumers said they



will be making their gift purchases without a shopping list, and 92 percent of consumers will do grocery store holiday shopping based on sales, discounts, product selection and in-stock items, according to research from Information Resources Inc., a Chicago research company. There is obvious reluctance to incur credit card debt through holiday spending, but attitudes and concerns surrounding gas prices, cost of utilities, job stability, the rise in food prices and the recession are all seeing a decline in how these factors will affect this year's shopping rituals. Could it be that shoppers have simply grown accustomed to coping with the recession, living within their means and stretching their hard-earned dollars?

In comparison to 2008, concern about the price of food has

dropped more than 20 percent in 2009 (98 percent in 2008 versus 77 percent in 2009). Expressed concern for the effect of gasoline prices on holiday shopping has dropped by 10 percent compared to 2008, and utility concerns saw a similar decline, down just over 9 percent from 2008. The overall effect of the recession on shopping decisions has decreased nearly 5 percent, but job stability concern remains top of mind, with a decline of only 1 percent.

Consumers plan to spend the same or less this year on holiday meals than in 2008. Nearly two-thirds of consumers plan to eat their holiday meals at home, half plan to dine at their friends' homes and holiday parties, and almost all plan to consume alcoholic beverages during these holiday parties. More than 94 percent plan on spending no more than 500 on food, and 90 percent plan on spending no more than 200 on holiday beer, wine and spirits purchases. Only 11 percent of consumers mention they will shop without a grocery list, and private-label buying continues to be popular among shoppers. Seventy-nine percent say budgeting and 60 percent say matched quality to name brands remain leading reasons for the switch to private label.

More than 90 percent of shoppers are making gift-giving a priority, up nearly three percentage points from last year. Twenty-three percent of shoppers have a gift-giving budget over 799, down 13 percent from 2008, and 11 percent more plan on budgeting up to 499 for gifts in 2009 than in 2008. For more information visit <http://us.infores.com>.

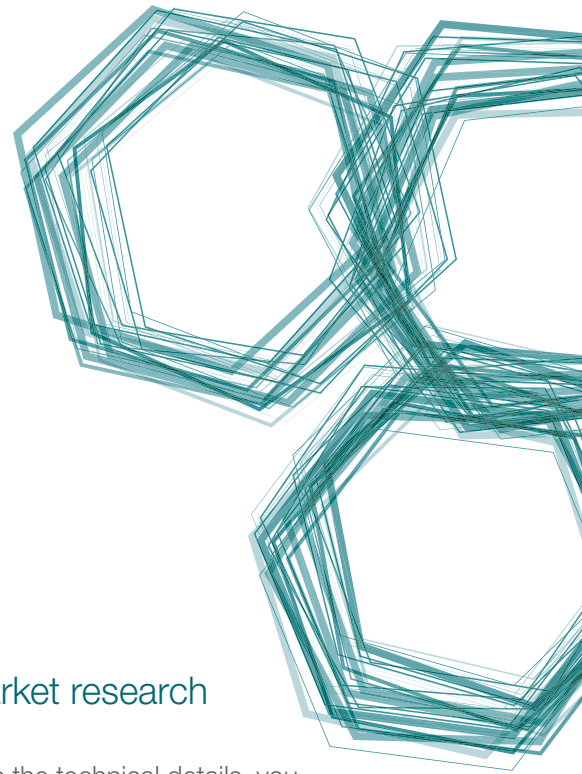
Wants versus needs: Are Americans learning to live with less?

From the kitchen to the laundry room to the home entertainment center, Americans are paring down the list of familiar household appliances they say they can't live without. No longer do substantial majorities of the public say a microwave oven, a television set or even home air conditioning is a necessity. Instead, nearly half or more now see each of these items as a luxury. Similarly, the proportion that considers a dishwasher or a clothes dryer to be essential has dropped sharply since 2006, according to data from Pew Research Center, Washington, D.C.

These recession-era reevaluations are all the more striking because the public's luxury-versus-necessity perceptual boundaries had been moving in the other direction for the previous decade. In 1996, the share of adults who considered a microwave a necessity was just 32 percent. By 2006, it had shot up to 68 percent, and in 2009 it has retreated to 47 percent. Similarly, just 52 percent of the public in the latest poll say a television set is a necessity, down 12 percentage points from 2006 and the smallest share to call a TV a necessity since the question was first asked more than 35 years ago.

Along with a new creed of thrift, there's another factor that appears to be shaping public judgments about certain items: technology adoption. Some consumer products, including some high-tech devices that have entered the marketplace relatively recently, appear so far to be recession-proof. A relative newcomer in the everyday lives of most Americans, the cell phone is among a handful of newer gadgets that have held their own on the necessity scale

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names of note

Derek Eccleston has been promoted to head of research at *eDigitalResearch*, Hampshire, U.K.

EasyInsites, a Surrey, U.K., research company, has hired **Misha Tsvelik** as custom panel manager.



Tsvelik

Filz

Research Now, London, has named **Martin Filz** director, client development, Asia. Filz will be based in Sydney, Australia.

Phoenix Marketing International, a Rhinebeck, N.Y., research company, has appointed **Marjette M. Stark** as president, digital dimensions.

New York-based *GfK Custom Research North America* has named **Kimberly Bastoni** group managing director, marketing, business development and global key account managements; **David Krajccek** managing director, GfK technology; and **Douglas Cottings** managing director, GfK financial services. Cottings will be based in Princeton, N.J.



Bastoni

Cottings

Integrated Research Associates, Cincinnati, has hired **Kathy Klausung** as senior project manager.

Borderless Access, a Bangalore, India,

research company, has hired **Jason Tiffer** as director, sales. Tiffer will be based in Los Angeles.

MarketVision, a Cincinnati research company, has named **Lorraine Roy** director, research.

The Advertising Research Foundation (ARF), New York, has appointed **Steve Coffey** of The NPD Group as co-chair of the ARF's Online Quality Research Council.

Robert Philpott has been appointed global CEO of Chicago research company *Synovate*. Synovate has also made two additions to its Asia-Pacific operations: **Erik Hellquist**, head of Synovate business consulting, Hong Kong; and **Satoshi Ayukawa**, business development manager, marketing management analytics, Tokyo.

Authentic Response Inc., a New York research company, has named **Jim Follett** CEO.

The Pharmaceutical Business Intelligence Research Group, Philadelphia, has appointed **Henry Gazay** of Miami research company *Medimix International* to its 2009-2010 advisory board.

Rachel Lewington has been named director, health care, of London research company *Kadence International*. Additionally, Kadence has made two appointments to its Indonesian office: **Aurelia Leopold**, associate director, research; and **Sylvia Anward**, senior manager, research.

IMS Health, a Norwalk, Conn., research company, has hired **Donald G. Otterbein** as general manager, business transformation services. The company has also promoted **John R. Walsh** to senior vice president, payer and government solutions.

InfoTrends, a Weymouth, Mass., research consulting company, has named **Chris Bondy** group director, cross-media workflow solutions.

Sandeep Ranade has been hired as director, client solutions, consumer research, of New York researcher *The Nielsen Company*. Ranade will be based in India. Additionally, **Oliver Rust** has been appointed managing director, Hong Kong.

Biz360 Inc., a Redwood City, Calif., research company, has named **Eric M. Israel** vice president, sales.

Reston, Va., research company *comScore* has promoted **Gregory Dale** to COO. ComScore has also hired **Anne Hunter** as vice president, advertising effectiveness products; and **Daryl McNutt** as vice president, comScore marketing solutions, media.

James Bell has joined *Kelley Blue Book*, an Irvine, Calif., automotive information company, as executive market analyst.

The NPD Group, a Port Washington, N.Y., research company, has named **Mark East** president, food and beverage, North America.

J. Reckner Associates Inc., a Montgomeryville, Pa., research company, has hired **David Hassall** as head of business research.

In the October 2009 Names of Note, a photo of **Joseph Ottaviani** was incorrectly captioned as **Tom McGoldrick**. Ottaviani was named vice president, Midwest region, of *Bellomy Research Inc.*, Winston-Salem, N.C., and McGoldrick was named vice president, retail, of *Morpace Inc.*, a Farmington Hills, Mich. Below are the correct photos.



Ottaviani

McGoldrick

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The Fine Art of Marketing Research

product and service update

GfK Healthcare debuts two offerings

GfK Healthcare, a Blue Bell, Pa., research firm, has introduced Managed Markets Delegates on Demand, a quarterly omnibus study designed to offer pharmaceutical marketers the ability to access and query a panel of managed markets decision makers. Deliverables include a quarterly data report, charts and graphs for closed-ended questions and full verbatim reports for open-ended questions.

Additionally, GfK Healthcare has launched Brand BEAT (brand equity assessment and tracking), a package of health care-specific brand-positioning diagnostic tools for measuring the cognitive and emotional strengths of a brand. The core of Brand BEAT is the brand equity assessment, which aims to evaluate brand equity by calculating brand cognition (rational and logical elements) together with brand heart (emotional elements). This exercise serves to predict physicians' future prescribing intentions and behavior.

Other diagnostic criteria applied through the Brand BEAT process to assess a brand's strength include brand awareness (What level of awareness do physicians have of Brand X?); brand performance (How is the performance of Brand X viewed in its competitive context?); brand personality (Does the target group see Brand X as intended?); and brand message alignment (Do Brand X's messages convey the promises as intended?).

Other modules within the Brand BEAT assessment include the brand attrition funnel and brand driver analysis. For more information visit www.gfkhc.com.

Carma expands social media offerings and upgrades NewsAccess

Washington, D.C., research com-

pany Carma International has updated its methodology to better measure social media coverage. As part of this initiative, Carma has devised methods for analyzing reader comments and hyperlinks appearing within social media to explore how discussion in the blogosphere affects brand image. Social media analysis is available through traditional human-based analysis and as a quick-pulse monitoring and measurement tool through Social Media Access or NewsAccess.

Carma has also enhanced its measurement tool NewsAccess to include Social Media Access so that users can choose to view social media results alongside traditional media results or display social media data in a separate interface. Other updates to NewsAccess and Social Media Access include applying tone ratings to articles and allowing customization of core charts and data tables. For more information visit www.carma.com.

IRI updates Total Store Advantage offerings; launches Foresight

Information Resources Inc. (IRI), a Chicago research company, has added Total Store Advantage (TSA) and Total Store Advantage Wall Street Edition to its suite of solutions built on IRI's Liquid Data technology. TSA is designed to run analyses to shape product, price, promotion, assortment and merchandising strategies. TSA also aims to allow consumer packaged goods (CPG) companies to identify trends and growth drivers; benchmark performance; gain insights into competitor activities and strategies; uncover expansion opportunities; create standard reporting and workflows; eliminate manual data errors; and ensure accuracy for non-additive measures.

TSA Wall Street Edition customizes the TSA solution for security analysts, portfolio managers and other members of the investment community, as well as CPG executives that liaise with investors. TSA Wall Street Edition is also designed to give executives better information to understand the true state of competition and share position in total store and by category; follow mega-brand performance across categories to understand the strength and levels of investment being made; gain new insight into how reliant parent companies are on a retailer-by-retailer basis; evaluate success of partnerships/alignments and understand exposure to retailer changes; and create scenarios for actual or prospective mergers to determine new parent-company size, trends, strengths, weaknesses and avoid the need to wait for financial restatements.

Separately, IRI has launched IRI Foresight, an analytic-driven consulting capability designed for ongoing business and strategic planning that tracks approximately 400 economic indicators; identifies factors most relevant for brand or category growth; and offers forecasts of up to five years. IRI Foresight is intended to measure the effects of macroeconomic activity on consumer spending, including factors such as inflation, interest rates, unemployment rates, property values and credit availability. For more information visit <http://us.infores.com>.

Synovate introduces 'always on' research

Chicago research firm Synovate has introduced Synovate Community Panels, an online solution designed to allow companies to integrate qualitative and quantitative research to

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News notes

Following the closing of **Evo Research and Consulting** in London, the company's New York Division will reopen and operate as **Think Conservatory**.

Chicago research company **Synovate** intends to close its call center in Ottumwa, Iowa, terminating 80 part-time jobs and one full-time position. Synovate will offer remaining employees the opportunity to continue working from home.

Survey Sampling International, a Shelton, Conn., research software company, has launched **Research Voice**, an industry-wide initiative dedicated to improving the research experience for participants.

Zogby International, a Utica, N.Y., polling company, celebrated its 25th anniversary in September 2009.

Chicago research software company **SPSS Inc.** reached a settlement with Norman H. Nie, its co-founder, regarding litigation involving the SPSS trademark which was pending in the U.S. District Court for the Northern District of Illinois, as well as related litigation seeking indemnification and advancement of expenses pending in the Delaware Chancery Court. Terms of the settlement were not disclosed.

Acquisitions/transactions

Chicago research company **Information Resources Inc.** (IRI) has acquired **The Hendry Corporation**, a Southport, Conn., marketing consulting and software company, from Symphony Marketing Solutions. Both Symphony Marketing Solutions and IRI are owned by Symphony Technology Group, Palo Alto, Calif. The acquisition is intended to strengthen IRI's consumer and shopper insights applications.

Calendar of Events November-March

ESOMAR will hold its qualitative research conference on November 15-17 in Marrakech, Morocco. For more information visit www.esomar.org.

CASRO will hold its annual data collection conference on November 19 at the Four Seasons in Las Vegas. For more information visit www.casro.org.

StratConn will hold a conference, themed "Retail and Shopper Insights," on January 20-21 in Rosemont, Ill. For more information visit www.stratconn.org.

CASRO will hold its annual panel conference on February 24-25 in New Orleans. For more information visit www.casro.org.

ESOMAR will hold its global health care research conference on February 28-March 2 in New York. For more information visit www.esomar.org.

Frost & Sullivan will hold its annual competitive intelligence conference, themed "Strategic Competitive and Market Insights to Propel Profit and Growth," on March 10-13 in Washington, D.C. For more information visit www.frost.com.

PMRG will hold its annual national conference on March 21-23 at Disney's Contemporary Resort in Orlando, Fla. For more information visit www.pmr.org.

The ARF will hold its annual RE:THINK! convention and expo on March 22-24 at the New York Marriott Marquis in Times Square. For more information visit www.thearf.org.

Research Magazine will hold its annual conference on March 23-24 at the Park Plaza Riverbank in London. For more information visit www.research-live.com/research2010.

To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail Emily Goon at emily@quirks.com. For a more complete list of upcoming events visit www.quirks.com/events.

New York researcher **The Nielsen Company** has acquired **KoreanClick**, a Seoul, South Korea, Web measurement company. The acquisition expands Nielsen's global measurement capabilities with coverage of Internet users in South Korea.

Integral Market and Opinion Research, Vienna, Austria, has acquired a majority share in Heidelberg, Germany, research company **Sinus Sociovision**. Terms were not disclosed.

Babbletype LLC, a Snellville, Ga., research transcription services company, has completed its acquisition and integration of **MRT Services LLC**, a Loganville, Ga., research agency. The company will operate as **MRT/Babbletype** and has offices in Philadelphia and Snellville.

Maktoob Research, Dubai, United Arab Emirates, has signed an agreement with **Yahoo!**, Sunnyvale,

Calif., whereby Yahoo! will acquire Maktoob Research as part of a full acquisition of Maktoob.com's Internet portal-related businesses. The agreement will also allow Maktoob Research to access Yahoo!'s Arab Internet users for its consumer panel.

Alliances/strategic partnerships

New York research companies **Survey U Inc.** and **Youth Pulse LLC** have partnered to create **Youth Pulse Inc.**, which will focus on tween, teen, college and young adult insights for marketing, brand and media professionals, providing news, commentary, events, research and strategy. Offerings will include a Web site (www.ypulse.com), a daily newsletter, annual conferences and a proprietary online research community (www.surveyu.com).

continued on p. 72

MORE THAN EVER, QUALITY AND EFFICIENCY MATTER

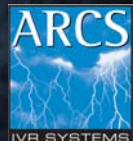
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Team moderating: a tonic for tough times

Sensitive to the current economic peril, consumers have changed spending priorities, shed brands and entire categories. They are rewriting the value proposition for a host of brands.

Responding to the more disciplined consumer, marketers are reevaluating basic premises and working hard to restructure efforts to engage purchasers and drive brand choice. Only the nimblest marketer will be able to keep pace.

The need for fresh consumer insight has never been greater. More than ever, we in the marketing world are being challenged to gauge the new consumer mindset and uncover relevant insights more efficiently, more cost effectively, smarter.

One qualitative research approach that fills the bill on all three counts (effi-

ciency, cost-effectiveness, doing things smartly) is the concept of team moderating. While many research companies typically follow the one-moderator-per-project model, there are valuable upsides to using a team of specialists for a variety of qualitative projects. Although the authors of this article each own his/her own independent qualitative firm, we have discovered that teaming up with each other as well as other researchers and professionals can provide an array of benefits for both our clients and ourselves.

A team approach can lead to improvements in the richness of learning, in our ability to be responsive to tough marketing challenges and aggressive timing needs.

The specific benefits of a team approach to qualitative research are:

Editor's note: Marie Lemerise is president of The Tapestry Group, a Brooklyn, N.Y., research firm. She can be reached at 718-788-5920 or at marie@tapestry-group.com. Erich Rupprecht is principal of Erich Rupprecht Consulting, a South River, N.J., research firm. He can be reached at 732-238-2164 or at erupprecht@aol.com. To view this article online, enter article ID 20091101 at quirks.com/articles.

1. More expertise, more insight.

The combined experiences of professionals from different disciplines (psychology, anthropology, economics or other social sciences) can deliver distinctive insights on complicated issues. Understanding where consumers are headed, how they view value, what it takes to encourage them to buy your brand - these are questions that benefit from the analytic strength of an interdisciplinary team.

In the current culture of anxiety, a team that includes an ethnographer along with a marketing-savvy qualitative researcher can produce incisive insights, including the language plat-

snapshot

Using multiple moderators, with their respective skill sets and areas of expertise, can bring fresh insights to the qualitative process and help marketers understand consumers' changing needs and habits.



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form and engagement tools for more effective marketing.

And, in many categories, rebuilding the bond of trust with consumers is now a central priority. An interdisciplinary team of specialists can mine both overt and subtle dimensions of trust, to frame a credible way to communicate a brand's commitment to core principles.

2. Maximize and optimize the research investment. Using multiple professionals on a project can allow for greater creativity and efficiency in terms of structuring the research for optimal learning. The cost-efficient design possibilities include 1) bundling methodologies and 2) simultaneous or tandem-group discussion format.

For some initiatives it is important to gain multiple perspectives on the same topic from distinctly different target audiences: for example, company employees and their managers; vehicle shoppers and dealers; parents and their teenage children; cancer patients and oncologists.

In several cases we have used a bundled design including multiple methods of depth interviews, small groups (triads or quads) and a few ethnographic encounters along with interactive conversations among customers and prospects.

A second approach when two

different audiences are important is to conduct simultaneous/tandem focus groups. This involves one audience segment observing a group discussion with a different target segment, such as physicians and patients (not their own). One moderator interviews the patients while a second moderator works with a group of physicians observing the patient discussion from the back room. Immediately following the patient panel, the physicians gather in the interview room for their own focus group, discussing the patient perspective. Such sequential groups can shed insight on conflicting belief systems and how to work toward better alignment. (Of course this can be applied to sales teams/customers and a variety of other provider/recipient audiences.)

These two examples of a layered approach indicate the depth of learning usually unavailable in a standard qualitative design. And the projects described can be more cost-effective than conducting separate initiatives among disparate target segments.

3. Get inside the ecosystem.

In this fluid marketplace, it is not enough to hear consumers report behavior; it is imperative to see what's happening as it unfolds and learn how the consumer defines new choices and actions. Working

with a qualitative team clients can step inside the consumer's ecosystem. A qualitative team together with smart design can break the boundaries of the interview room and the proscribed time limit of an interview discussion.

The expanded capabilities of a qualitative team allow the inclusion of a range of consumer-generated material such as cell phone photos, blogs and digital photo/video diaries. These visual and narrative on-the-spot, in-the-moment materials add depth to the insight-gathering process. The resources of a qualitative team enable rapid analysis to uncover new themes for client action.

On a recent assignment we had consumers generate a variety of visual materials to describe their emotional journey, product experiences and response to new product offerings. Our team included a market researcher trained in Jungian psychology, a former journalist, a sociologist and ethnographer. Together the team analyzed the interviews, video, collages, online activity and photo journals. This resulted in a layered, refined understanding of the target segments, a unifying brand strategy and many ideas for brand engagement programs.

4. Better problem-solving. The good ideas just seem to come faster and in greater numbers when we work in a team than when we work alone. Having qualitative specialists with different bodies of experience increases the number of options available by bringing a broader spectrum of elicitation techniques, an expanded set of analytical tools and a wider array of solutions for knotty strategic problems.

5. Ability to handle larger projects/quicker project turnaround. Sometimes a project's scope is simply too large or the timing requirements too compressed for a single researcher to handle all the moderating/interviewing/analysis. Having two or more researchers on a project allows for greater coverage (more groups/interviews per day; multiple cities simultaneously),

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livelier/fresher interviewing and an ability to obtain several perspectives on the research issues.

6. Closer collaboration, better leverage of backroom dynamics. As any qualitative investigator knows, what happens in the back room is as important, if not more so, than what happens in the interview room. Client observers often represent different stakeholder constituencies in the company. Marketing partners from various agencies (advertising, digital, etc.) typically attend as well. Backroom discussion while viewing qualitative fieldwork often reveals emerging issues and different agendas to be addressed. Idea generation typically occurs simultaneously with viewing.

A great way to capture and capitalize on the backroom dynamic is through dual moderating, where one researcher participates from the back room while the other conducts the fieldwork. Having a seasoned professional interacting with clients during the research helps to more efficiently collect backroom brainstorming, frame the learning and provide more timely and focused analysis. In quick-turnaround situations it is sometimes essential to have a backroom partner.

7. Reduction of interviewer bias. Having multiple moderators can help reduce the interviewer effect: the possibility that the research results are being unduly influenced by the moderator and his/her style.

Daunting challenges

In our view, the qualitative team approach provides marketers with an efficient, cost-effective tool to help meet the daunting challenges of today's tough economic climate and to find possibilities for innovation and growth. The team approach, simply put, means assembling the best combination of moderators/professional partners (from a variety of potential disciplines) to meet the unique needs of each project. In tough times like these, it is crucial to have a "dream team" of committed, creative professionals in your corner. | Q

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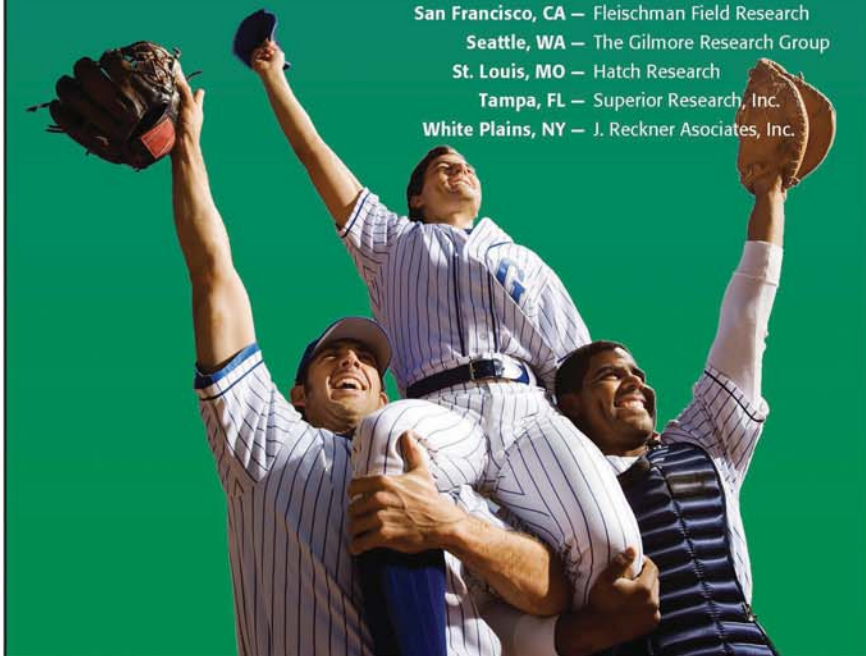
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How to improve your segmentations with max-diff

When conducting segmentation analysis there are several issues to consider, not the least of which are the questions used for analysis. More than almost any other factor, the questions asked will influence the quality of the segmentation results. The two main issues with regard to questions are question content and question type.

Question content refers to the subject areas covered by the questions. They could be attitudinal, behavioral, demographic, etc. While there are plenty of issues to discuss on this topic, that is not the focus of this article. We will confine ourselves to a discussion of question type.

Question type refers to how questions are asked. Various types of scales are often used to collect data for segmentation analysis. The pri-

mary purpose of all of these scales is to be able to get sufficient discrimination between respondents. If a scale is unable to discriminate between respondents then it is not contributing anything useful to a segmentation analysis. Using such a scale would be no different from using a constant in the analysis.

Consider that one of the most popular types of questions asked in segmentation studies is the importance question. This could take various forms such as importance of product features, brands, decision criteria and so on. The traditional way of asking the question is to use an importance scale where each of these items is rated (perhaps on a 1-10 scale). The problem with this approach is that the respondent considers each item in

Editor's note: Rajan Sambandam is chief research officer at TRC, a Fort Washington, Pa., research firm. He can be reached at 215-641-2251 or at rsambandam@trchome.com. To view this article online, enter article ID 20091102 at quirks.com/articles.

isolation and, further, has no incentive to say that anything is unimportant. As a result one often sees data where many items are rated as important. More damagingly from a segmentation perspective, the questions don't sufficiently discriminate between respondents. This greatly reduces the usefulness of these questions in the analysis. So, what is the alternative?

Make comparisons

One could use an approach where respondents to a survey are asked to make comparisons, rather than rate each item in isolation. For example, a pairwise comparison task could be used where the respondent indicates the item in each pair that is more important. While this has the capacity to provide better discrimination between respondents, it is also more

snapshot

The author uses a checking-account example to show how maximum difference scaling, or max-diff, can deliver finely-tuned segmentations without subjecting respondents to an onerous number of comparison questions.

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tedious, as the number of pairs to be evaluated quickly balloons. Designs can be used to pare down the number of pairs but the fundamental problem is that we are not making use of the respondents' full cognitive capacity. Comparing two items and choosing the more important one is often a very easy task. Respondents have the capacity to choose from more than two items at a time, and it is precisely this ability that maximum difference scaling (max-diff) exploits to give us better results.

Best and worst

Max-diff is a recent development in statistical analysis. It is a comparative method where respondents are shown sets of items and asked to pick the best and worst, or most- and least-important item, in each set. The number of items shown per set usually varies from three to five. The manner in which the items are grouped together and the order in which they appear are carefully selected through an algorithm. Data are then analyzed using hierarchical

Table 1

Features	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5
Interest rate	8	7	7	9	5
Gift	7	4	6	5	5
Accounts	10	9	8	10	5
Locations	9	9	8	9	6
Reputation	10	8	8	10	6
Fees and balance	10	10	7	10	6
Recommendation	7	5	6	5	5
Online banking	9	9	8	3	5
Branch hours	9	7	7	8	6
Phone hours	9	4	6	6	6
Customer service	9	8	7	9	6
Free checking	10	10	8	10	5

Bayes estimation to provide importance scores for all of the items used in the design. Scores appear like percentages and add up to 100. Since respondents have to make comparisons and choices, the problems mentioned with traditional importance scales are largely absent.

It therefore stands to reason that using max-diff to collect data for segmentation is likely to be more fruitful than using importance

scales. In order to demonstrate this, a test was conducted and the results are reported here (Tables 1 and 2).

A split-sample design was used to identify feature importance when opening a checking account. A random half of the sample rated 12 features that were important to them in opening a checking account using a 1-10 importance scale, anchored by "not at all important" and "very important." The other half of the sample was given a max-diff task for the same 12 features. They saw 12 sets of four items each and chose the most- and least-important feature in each set.

The importance scores from the max-diff analysis are available at the individual respondent level and hence are ready for segmentation analysis. A neural network-based segmentation technique called self-organizing maps was used to analyze both sets of data. The five-segment solution obtained with the importance scale information (rounded mean scores) is shown in Table 1. As can be seen in the table, the segments don't show much variation between them. One of them (Segment 1) has high scores on all variables, while another (Segment 5) has low scores on all variables. This is a typical pattern when the scale does not discriminate well between respondents. Other segments show only sporadic variation. Overall the results are not particularly interesting to a manager looking for differences in perception.

Results from the max-diff data-based segmentation are shown in Table

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Table 2

Features	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5	Segment 6	Segment 7	Segment 8
Interest rate	2	3	2	6	1	55	2	7
Gift	0	0	0	1	0	2	0	6
Accounts	3	10	48	13	4	5	9	9
Locations	2	6	7	4	1	3	63	10
Reputation	2	3	9	37	1	3	2	5
Fees and balance	6	57	11	10	2	13	9	10
Recommendation	0	0	0	1	0	0	0	6
Online banking	4	3	9	5	85	4	6	18
Branch hours	0	1	1	1	0	1	1	6
Phone hours	0	0	0	1	0	0	0	3
Customer service	1	1	3	12	0	1	1	4
Free checking	80	15	9	9	5	13	7	17

2 (rounded mean scores). It is immediately apparent that these results are very different from the previous results. Seven of the eight segments are very clearly defined by a single variable. Some segments (such as Segments 1 and 5) are overwhelmingly defined by one variable, while others place some amount of importance on one or two other variables also. But it is quite clear that the max-diff method has been able to clearly identify the differences

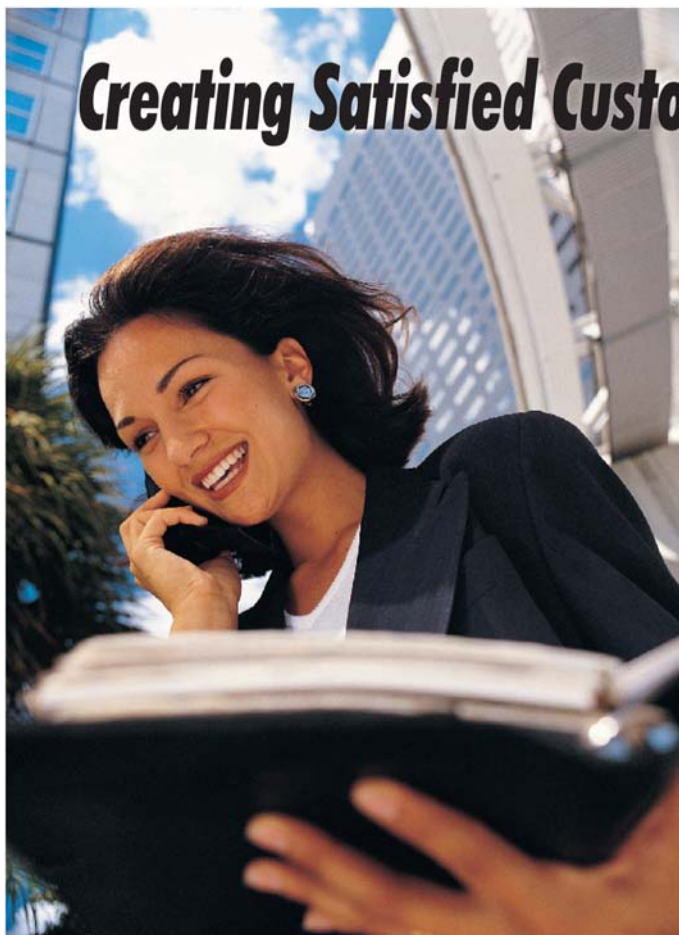
in importance placed on these features by the respondents, and the segmentation analysis has been able to capitalize on the variance in the data to produce (seven) interesting segments.

Very worthwhile

Using max-diff in a Web survey is very straightforward. It is possible to use in a phone survey too, but the problem has to be limited to a few features and those features have to be

defined very simply. Given the need for data discrimination in segmentation analysis, it would be very worthwhile to consider if comparative methods like max-diff can be used in your next market research project. | Q

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Mrs. Wu makes a meal

How culture helps marketers understand sensory experiences

At the intersection of cuisine, culture and cognition, eating food is a universal experience in which people gain the satiation that sustains human life while achieving gustatory pleasures that affirm both the ego and memberships in social groups.

An analysis of the ways in which chicken is cooked and eaten in China illustrates and typifies this intersection. As we learned while conducting a global food ethnography, consuming chicken in China involves an array of sensory experiences – visual, olfactory, gustatory and tactile – so profoundly different from Western experience that an understanding of chicken flavor cannot be understood without referencing Chinese culture as its source.

Focusing on practices characteristic of another culture brings both our own culturally-bound rules and norms as well as theirs into sharp relief. It highlights Franz Boas' fundamental principles of cultural relativism: that the biological, linguistic and cultural traits of human groups are consequences of historical developments involving both cultural and non-cultural forces.

Cultural diversity is an essential human attribute, and individual behaviors within specific cultural environments follow their own forms on their own terms.

Editor's note: Hy Mariampolski is managing director of QualiData Research Inc., Brooklyn, N.Y. He can be reached at 718-499-4690 or at hy@qualidata-research.com. Michael P. Cook is head of consumer understanding at Givaudan Flavors Corp., Cincinnati. He can be reached at 513-948-5599 or at mike.cook@givaudan.com. To view this article online, enter article ID 20091103 at quirks.com/articles.

snapshot

To learn more about the role of scent, flavor and ritual in the preparation and consumption of chicken for its TasteEssentials program, Swiss sensory firm Givaudan conducted ethnographic research in China.

Cultural cues intersect with sensory experience at all stages of the life course to produce the pleasures associated with eating one's native cuisine. Consequently, what we desire to see, smell and taste becomes rooted in our daily experiences. We become complicit in our own connivance when we gain pleasure through an acquired or created fragrance or flavor. When a young lady uses a heady scent to appear more sexy, desirable or mysterious than she really is, we are wise to such devices and love every minute of it.

This essential truth has given rise to the worldwide flavors and fragrances industry. One member of this industry, Zurich-headquartered Givaudan, was the client that sponsored the worldwide ethnographic study as a means for discovering new chicken flavors that could be profitably commercialized. This article is based on insights yielded

by this ethnographic study.

Through thorough immersion into the contexts in which culturally-authentic flavors are created – the markets, kitchens and dining rooms of everyday homemakers in China, Indonesia, Brazil, Colombia, Mexico, Spain, France and the U.S. – the client sought to learn about the bases and techniques for the elaboration of flavors. Based on this research, Givaudan has created and launched the TasteEssentials chicken program, to let its food industry customers identify the precise chicken essence, signature and aroma they want to purchase.

Associated with hospitality

In people's homes, certain odors are associated with hospitality and the host risks shame and embarrassment if other odors are evident. For example, when you visit a friend's house, would you rather be greeted by the warm and

cozy aromas of a vanilla-scented candle or by the ambient smells of the garlic he has just fried and his cat's litter box?

Some consumer segments express a preference for "no fragrance at all," particularly in categories such as laundry and cleaning products. Often, this perception is created through a synthetic "no smell" fragrance in much the same way that creating "white noise" reduces ambient noise.

Real-estate agents renting or selling a home always try to cheer it up by baking bread because when someone is in a buying mode, they prefer the warmth and hominess evoked by comfort food to the odors of four walls and a rug. When we examine such a house we're cheered by thoughts of a possible home, rather than being depressed by the financial implications of buying real estate.

Some airlines bake chocolate-chip cookies shortly before the plane lands



and typically distribute them among premium passengers in the front of the aircraft. Even if calorie-counting executives decline the cookie, the smells wafting throughout the airliner provide comfort to all on board.

Similarly, when we offer, purchase and consume foods, we expect a certain sensory experience produced by the esters and other volatile flavor components released during the peeling, processing, combining of ingredients, cooking, dressing and cooling of foods to affect our

emotions. These expectations are profoundly imprinted in the structures of our brains. Our eyes intersect with our gustatory receptors until a certain kind of visual experience becomes associated with the overall phenomenology of eating and drinking.

The role of packaging illustrates the importance of the visual dimension. When we see product images on packages we are not disturbed, and in fact are delighted, by their having been photographed with the assistance of stylists who do things like placing marbles at the bottom of soup bowls and painting vegetables to make them look more sumptuous.

Deep emotional memories

Meals of the past become associated with one's sense of self and feelings of security. Olfactory memory is associated with deep emotional memories because they are all resident in the limbic system and its associated components such as the hippocampus and amygdala. These parts of the brain are connected with primal individual emotions such as self-protection, maternal love, care of children, sexual desire and satisfaction of hunger. There is little consensus about the precise biochemical process by which these connections occur and it is clear that olfactory memories may be inaccurate as well as based on context and subsequent experience. Nevertheless, they produce powerful emotional associations.

Most of the memories we bring to mature adulthood, which we associate with who we are, seem to take place between the ages of 15 and 30, when the influence of verbal expression, imagery and music are strongest. Among Baby Boomers, hearing a few lines of a Beatles song, for example, may prompt a completion of the verse and a quick association with a time and place in which the song was heard in the past.

Smell and taste memories go back to an earlier time in the life cycle and are deeper and more emotional in their processing. The smell of your grandmother's chicken soup or *arroz con pollo*, the scents of Christmas – pine, egg nog, cinnamon – or the smells of lilacs in your spring garden evoke a personal relationship from your past.

Several years ago, while one of

the authors was conducting ethnographic studies of home cleaning, we tried to understand the visual, olfactory and possibly other sensory cues that produce a sense of satisfaction with operational results. Interestingly, we found that to perceive one's home as clean, it also had to smell clean and there were ethnic variations that were a consequence of early social learning. For example, among Hispanic-Americans, there was a preference for the smell of pine as a signal of "clean" – a component of one of our client's major brands that their mothers and grandmothers had always used for house cleaning. We quickly realized that the mention of a pine scent was a compelling way of communicating about cleanliness with the U.S. Hispanic market.

Smells, as a stimulus, work at a deeper level because they bypass much of our cognitive brains. However, if this is so, isn't there an element of invasiveness going on here? Is it actually "fair" to use smells as a marketing tool? The answer: Most appeals to emotion struggle to bypass our cognitive processing. It is certainly no more or less manipulative to use smells than to use sexually suggestive imagery or sentimental music as part of marketing.

These associations between culture and sensory experience were consistently demonstrated in the ethnographic study we conducted for Givaudan. The case study below illustrates how flavor notes are created during a culturally-bound performance that proceeds from purchase to presentation at mealtime.

Note: This case study represents a composite of several respondents whom we encountered during fieldwork in China. Similar procedures were followed in each market throughout the study.

Buying chicken in China

The process of chicken flavor creation begins with the chicken species and varieties chosen for processing into saleable creatures, how they are raised (i.e., the conditions of housing, feeding and storage) and how they are presented, selected and prepared at the point of sale.

We met up with Mrs. Wu, a smiling woman in her early 40s, outside



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of her apartment building in a relatively new housing development in northeastern Guangzhou, historically also known in the West as Canton. This neighborhood, constructed along a main road leading out of the city from its center, is filled with huge apartment blocks developed over the last decade. Mrs. Wu's is typical: six 28-story buildings constructed around a small central courtyard area in which older people relax while children play. A uniformed guard who pompously salutes us as we enter and leave officiously maintains the entrance to the housing block.

The main road is a cacophony of lighted signs and garish billboards advertising local restaurants and businesses, Western fast-food franchises, the latest local and international films and a range of brands and products, from hand soaps to electronic games. Red banners with large yellow-gold letters offer public proclamations. The ambience is decidedly middle-class and achievement-oriented.

One of the neighborhood's large stall markets is entered through a narrow corridor on a side street about 50 meters from the main street. Even though an impressive outpost of the French supermarket chain Carrefour sits a block and a half away, most shoppers prefer to purchase fresh goods and locally-branded products from their favorite market stalls.

The market's interior space encompasses about 100 x 50 meters sectioned off by produce type, fish mongers, tofu makers, herbs, fruits and vegetables. Sellers of frogs, crocodile and other unidentifiable meats appear disconcerted by a Westerner's curiosity. It is loud and crowded for a weekday afternoon; the cries of the stall-keepers mix with the shouts of haggling shoppers, cackling animals and static-riddled music coming from cheap radios.

Mrs. Wu's favorite fowl and poultry stall is located against a back wall of the market area. Chinese homemakers prefer to buy their birds alive and as close to the actual cooking time as possible. Large advertising banners surrounding the stall illustrate chickens happily pecking away in a field - reinforcing that these are free-range birds (*zou di ji*) from a well-known farming region

close to Guangzhou. In contrast, the hens, ducks and geese at the stall are momentarily resting in metal and bamboo cages, pecking at dried corn. The air is redolent with the scents of burned feathers and bird droppings.

Mrs. Wu points to a bird in one of the cages; the stall-keeper yanks it out and hands it to her for closer inspection. Gripping the squawking creature tightly, she examines the shine and cleanliness of the feathers, examines its claws to check that they are thin, listens for the strength of its

cries. She also focuses on its cloaca, the posterior opening that serves its reproductive, intestinal and urinary tracts. Chinese shoppers prefer young castrated cockerels or small and young hens, before they have begun to lay eggs (*gai hang*), and a tight cloaca is evidence for this trait. She approvingly hands the bird back to the stall-keeper, who quickly passes it to an assistant behind the counter.

The shop assistant instantly folds back the bird's head with a finger and slices its throat with a sharpened blade;

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its blood is squeezed into a pail at his side. He then hands the bird off to another assistant standing next to vats of steaming water who plunges the bird into the liquid before pulling off its feathers. Mrs. Wu, whose attention has been diverted during the processing by some vegetables in a neighboring stall, returns to pay for and collect the still-warm bird in a black plastic bag. We rush back to her apartment after she purchases vegetables and several pieces of fish to complement her meal.

All of these purchase routines and rituals have yielded elements that are important for flavor production. The free-range chicken's relative youth, its quick processing and minimal handling, the need to cook the bird within the hour without freezing or even refrigeration, all produce flavor notes critical to the final product.

Cooking chicken in China

Mrs. Wu brings the meal fixings back to her 18th floor two-bedroom apartment. Her husband, employed by an export company, is still at work. Her two children, a boy aged 12 and a 14-year-old daughter, are attending after-school cram classes to improve their math and English skills. Her mother, who occupies a section of the children's room and maintains the household when Mrs. Wu is away at her part-time job at a department store, shyly remains in her room after quick introductions when we enter.

The visiting observer team, including our local ethnographer and product development and marketing executives from the Beijing office of Givaudan, sit in the ample living room sipping tea, hastily served by the hostess when we enter. We have all accommodated ourselves during the shopping excursion to speaking in a combination of Cantonese, Mandarin and English so that everyone understands everyone else.

The living room's comfortable plush leather sofas are bracketed by a picture window affording views of the nearby skyline at one end and the dining area at the other end. A lacquered, black wood breakfront sits at the edge of the space, stocked with bottles of vintage French cognac that Mrs. Wu's husband keeps as an "investment." The breakfront is also

decorated with bric-a-brac and a small Buddhist altar featuring lit candles, incense and offerings of fruit.

The kitchen is located behind a glassed window at the far end of the dining area. Facing back to the dining and living areas is a small stove with a wok at its center. The cooking area has small but relatively new and well-designed white appliances.

Chicken plays an important dietary role in Guangzhou; there is a popular proverb: "It isn't a dinner if there is no chicken." It plays an important role in daily meals as well as special occasions. During the winter, chicken soup (*qing bu liang bai ji*) is popular, but during the summer cooks prefer dishes like *bai qie ji* (chicken with garlic and ginger sauce). Chicken is a very important part of meals during festivals, or if there are visitors in the home; it is also believed to have medicinal properties.

A skilled cook, Mrs. Wu likes to deconstruct and then cook dishes she encounters outside the home. Her children appreciate the "chicken nuggets" that she has copied from meals they eat at McDonald's. Today, the signature dish she is preparing for the observers is a chicken with peanut sauce that she first tasted at a local restaurant.

She uses a small cleaver, her principal tool, to cut the carcass in half, discarding the tail but keeping the head, which is not eaten but retained to decorate the final dish. She allows the large pieces, along with the liver, to sizzle in the dry heated wok. She explains that this step removes any traces of blood and bad or "fishy" smells that may have been created during the walk back from the market.

This step also has the effect of sealing in the flavors while the chicken steams in its own moisture. Chinese cooks believe that it is important to preserve the natural flavors of their meats; consequently, they rely upon quick cooking processes and minimal use of seasonings. Recipe ingredients are added late in the preparation process and are applied to enhance and highlight rather than to modify or alter the meat's natural flavor.

After two to three minutes, some peanut oil and black bean oil are

introduced and the chicken halves are permitted to sizzle until coated. After approximately two minutes, a small amount of unsweetened peanut butter is added; then, soy sauce is poured to coat the chicken. Finally, chopped ginger, salt, sugar, and rice wine are added; the ingredients are stirred together for two or three minutes over a high flame. Then, a lid is placed on the dish, and the flame is turned to "gentle."

Two to three minutes later, Mrs. Wu removes the covering and the turns the chicken over again while adding some soy sauce and sugar. The cover is replaced. The chicken is checked and stirred three to four minutes later and then occasionally. After low simmering for about 40 minutes, when the meat of chicken "bursts," Mrs. Wu takes the chicken out of the wok and places it onto a large plate.

While the chicken is cooking Mrs. Wu prepares bok choy leaves in simple soy sauce and ginger and steamed bitter melon stuffed with fish pieces, which will accompany the chicken dish. The side dishes have been selected for both their nutritional value and to highlight the sweet nuttiness of the chicken dish.

Some additional peanut butter is stirred into the juices left in the wok in order to thicken the sauce a bit. After cooling the chicken for a while, Mrs. Wu puts on an apron, asks the visitors to leave the kitchen and, using her cleaver, chops the chicken into bite-size pieces, about 3-4 square centimeters (inch-and-a-half squares). Then, all of the pieces are arranged on a metal serving plate in the approximate location of their "live" appearance and topped by the cooked chicken head. The additional sauce is poured to coat all the chicken pieces.

Eating chicken in China

By the time the meal is eaten, the children have returned from school and are delighted to practice their English lessons with an American visitor in their home. Mrs. Wu beams with pride at her children's confidence and ability. Her mother joins us at the table but her husband has called to say that he will be home late, again.

As the dish is presented, the American guest, gaining the most

honor or “face” at the table, is encouraged to take what is considered to be the most delectable piece – the chicken wing.

Each piece of the dish includes skin, a layer of fat, soft bone, ample tendon typical of young birds along with the meat. The flavor experience includes each of these components. Chinese people like to masticate their foods thoroughly and continuously suck the juices produced by the chewing. Thick tendons amplify the gristliness that Chinese consumers find highly desirable across all meat categories. The sweet/salty nuttiness spiced with ginger enhances the gamy chicken and gives it a light and creamy mouth feel.

In China, chicken bones are discarded by being casually spat onto the plate or table cloth with no rudeness implied. In fact, it is considered polite to make certain that only the toughest, meatless bones are left behind. One of the authors learned of this custom several years ago while out drinking with several business acquaintances at a karaoke bar in Beijing and was served China’s second most popular accompaniment to beer, after peanuts: cooked chicken feet.

Mrs. Wu seems typical of many modern urban Chinese homemakers – open to innovation and the advances of modernity, curious about and eager to try “foreign” flavors. For example, she confessed to an interest in preparing Mexican dishes after trying that cuisine at a restaurant. Nevertheless, she is deeply rooted in her own culture and her tastes are defined by cooking rituals and routines that she learned as a child.

Hardly comparable

It is apparent that when purchase preferences, preparation techniques and cooking methods are considered, eating chicken in China is hardly comparable to its counterpart in America. Here, we prefer the chicken breast to the disadvantage of remaining parts. We discard skin and fat due to health concerns without consideration of what we are giving up in terms of flavor. Eating tendons and soft bones is alien to our expectations. We crave a light chicken flavor enhanced by a range of oils and spices appropriate to

the dishes being cooked. When the final flavors are compared, it is hard to believe that we are indulging in the same species as the Chinese.

The implications of these findings are clear for flavorists, restaurateurs, chefs and other food developers: The sensory experiences afforded during eating and drinking foods and beverages cannot be divorced from the conditions of their cultural production. To do so risks missing an understanding of how important

flavor components affect perceptions of authenticity and, ultimately, satisfaction with the final product. Product developers like Givaudan have recognized that a proper understanding of flavor must include an appreciation of the culturally-based expectations and perceptions in which they are grounded. | Q

Acknowledgement

The authors are grateful for the support of Barton Lee, East Market Research, Shanghai, who helped to collect and interpret the Chinese data.

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TECHNOLOGIES

The rules are changing

Considerations in quantitative data collection in China

Commercial market research is a relatively recent industry in China: The first Chinese market research provider, Guangzhou Marketing Research, just celebrated its 20th anniversary in 2008. As a young and growing industry, operation practices have undergone significant changes. In this article, we lay out considerations in data collection of quantitative studies specific to the Chinese market, with a focus on the technology market.

Suit the local context

All data collection methods, such as door-knock surveys, central-location tests, mail surveys, phone interviews and Web surveys, exist in China today. What differentiates China from other countries is the popularity of certain methods and how those methods are adapted to suit the local context. The three most-common methods are described below.

Face-to-face interviews

Face-to-face interviewing has been the default mode of data collection from the beginning of commercial market research in China. However, because of the growing popularity of phone and Internet use among businesses and consumers, more studies are now implemented by phone and by Web. Face-to-face is, however, still widely used in China and has its merits in at least two situations.

Under the Confucian influence, showing respect is necessary to successfully interview an executive in a large company, a medical doctor or a quasi-government officer in a state-owned enterprise. The face-to-face interview is the only method that offers the respect these respondents

expect. They tend to demand human contact, and interviewers must employ proper identification, business cards, documents, invitation letters and, most importantly, politeness and respect. This is in big contrast to Western customs. In the U.S., for example, senior business executives prefer to be interviewed by phone for the purpose of saving time and simpler logistics.

In another situation, face-to-face interviewing is the norm for data collection and quality control practices for local field providers in second- and third-tier cities. Different geographical regions of China exhibit wide discrepancies in their economic

snapshot

Conducting commercial quantitative research in China presents methodological and cultural issues that either don't exist or that have already been solved in Western society. Researchers must take heed in this relatively-virgin territory and adapt their strategies to cater to China's unique circumstances.



By David Ying Hon Ho

Editor's note: David Ying Hon Ho is research director (APAC) at Market Strategies International, a Livonia, Mich., research firm. Based in Hong Kong, he can be reached at david.ho@marketstrategies.com. To view this article online, enter article ID 20091104 at quirks.com/articles.

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developmental stages. Prices could vary significantly across city tiers. Compared to metropolitan Beijing, Shanghai or Guangzhou, low labor and rental costs in lower-tier cities mean that Web and phone surveys offer little cost advantage over face-to-face. Also, field providers in small cities have their practice more firmly built upon traditional methodologies.

Phone interviews

The prevalent mode of data collec-

tion is phone interviews, especially for business-to-business research in China. Most Chinese research companies are now equipped with a CATI center. The general pros and cons of phone interviews as a method apply to China the same as anywhere else. Here, we would like to bring up a special consideration in China, which is China's heterogeneous linguistic scene.

The widely-accepted view is that Chinese is a single language with various dialects. However, some linguists

view Chinese as a language family with numerous mutually-unintelligible languages in it. We do not plan to explore this academic issue here but, for practical purposes, it makes better sense to consider Chinese as a family of dozens of languages: Mandarin (Guanhua), Cantonese (Yue), Shanghainese (Wu), Taiwanese (Min, Hokkien), etc.

Phone interviews in China are often conducted in Mandarin, the standard national language. One practical problem is when a Mandarin native-speaking interviewer pronounces a brand name and the non-native Mandarin-speaking respondent does not always understand. In oral communication, when unfamiliar names or words are heard, differences in accents must be considered. In the mid-2000s, we had a CATI project across China. In the interview, the interviewer and the respondent discussed a number of software brands and product names. Unfortunately, in the technology market, these names are often in English and not translated into Chinese. Local pronunciation of English names can vary considerably. As a result, a significant portion of the interview time was spent on the interviewer and respondent trying to understand what the other party was saying. We had also seen interviewers spending more than a minute trying to understand a single response due to similar language barrier. In some cases, an answer might have been mistaken after all. In response to this language issue, well-trained interviewers and experienced field providers are particularly important in China, as opposed to markets like the U.S. that are linguistically more homogeneous.

The adoption of mobile phones in China has been growing at a double-digit rate. In early 2009, according to the Ministry of Industry and Information Technology, the national penetration was about 52 percent. It has exceeded 100 percent in the biggest cities but remains below 30 percent in rural areas. The research industry has been thinking about conducting research via the mobile phone platform in first-tier cities of China. However, cold calls or text messaging that targets the mobile platform is still largely unacceptable



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to respondents. While there have been sporadic attempts and experiments to do quick and simple studies, no appropriate methodologies have yet been created by researchers.

Web surveys

Many Chinese researchers have serious doubts about implementing Web surveys in China because of skepticism on sample representativeness and the impossibility of respondent authentication. We will discuss the sample issue in the next section of this article.

Regarding authentication, one cannot be certain that the recruited target respondents are filling out the Web survey themselves. Proxy respondents, usually subordinates of busy executives and IT managers, are known to be asked by their bosses to fill out surveys. In response, some research companies discourage the use of Web surveys. Others research companies might go back to some form of phone or face-to-face interviewing to establish the identity and legitimacy of the respondent. The task starts by recruiting respondents by phone and finishes by inviting them to a self-administered Web survey.

In the last few years, the trend in China, compelled in part by international research standards established in developed markets, is to do research online. As the Chinese research market matures, we expect that more studies will be administered online. And as more questionnaires become complex or require visual stimuli, Web surveys will become more frequent and advantageous. In the meantime, stringent quality control and data cleaning procedures are the remedy to current quality concerns.

Three broad areas

Sample is generally sourced from three broad areas: client lists, public sources and field provider proprietary databases.

Client lists

In studies that target the research client's existing customers, the sample is sourced from a client-provided list extracted from a customer database. It is a frame-based sample source from which a probability sample can be drawn. The precondition is that the list must be updated and accu-

rate, which unfortunately is often not the case in China. When employing customer lists in China, we find that it is best to assume a higher rate of "non-working" customer information compared to mature markets. Why Chinese lists are less accurate is not well-studied by the industry yet. We advise researchers to buffer during sampling in this market.

Public sources

Because of certain past criminal incidents, the Chinese government does

not allow the publishing of a comprehensive listing of phone numbers. Residential phone directories basically do not exist. While business phone directories are available in most cities, these directories represent mainly, or only, paid listings and exclude phone subscribers who are not advertisers. In other words, only Yellow Pages-style directories exist. Random-digit dialing is the remaining sampling strategy more widely used in CATI centers in China. Despite being a legitimate method, it should be noted that the



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preparation of the sampling frame and the configuration of dialer software are not carefully considered in some call centers. This is another pitfall researchers have to pay attention to.

Commercial databases are published and sold by business information and intelligence providers such as Dun and Bradstreet. For business-to-business studies in developed countries, these databases are important resources. In China, given the socialist legacy of complicated organization of state-owned, quasi-state-owned and other businesses, many of these databases have a far-from-ideal coverage of the target industry. Directories published by companies affiliated with official bodies, such as the National Bureau of Statistics, or industry associations are usually biased, as they are likely to contain only “related” companies. And the rapid change in China means these databases are usually outdated by the time they are in wide circulation.

In China, panels are widely used in fast-moving consumer goods research but less so in other product sectors. This is partly because consumer goods

research makes up the bulk of all research activities. Technology research panels and sub-panels do exist, but many of these panels are nascent and growing. Panel providers generally do not disclose the exact procedures or history of panelist recruitment, and the benchmarks of quality panel maintenance (and thus the “representativeness” of the panel) remain murky.

A significant concern in Internet and qualitative panel samples is identity fraud. It is commonplace for respondents to participate in research that they are not qualified for and thus earn incentives as their full-time job; sometimes contract researchers participate in a kickback scheme that benefits both the recruiter and the “participant.” Identity fraud exists in all markets, but given the current Chinese economic and social context, organizations such as the China Marketing Research Association have identified fraud as a more serious problem in China than in many other markets.

Field provider proprietary databases

As with other markets, each field provider in China aggregates con-

tacts of people to form a proprietary respondent database that can be used for various research modalities. How this database is built is often unclear to the research buyer, and field providers are often unwilling to provide specifics. Network sampling seems to be the usual mechanism: A field provider accumulates former respondents from projects it has conducted historically or recruits potential respondents via other channels. Sometimes a search is conducted on an ad hoc basis based on each project’s specifications. Because respondents are highly interconnected (A refers B, who refers C and D, etc.), no probability sample can be obtained and the selection of respondents in the pool essentially comprises a convenience sample.

Mix and match

In practice, under time, pressure and cost considerations, research providers in China tend to draw a sample by combining various sample sources mentioned above. This reduces risk by ensuring that if any one sample source has significant flaws, it is only part of the picture – not the sole source on which an entire project is reliant. While this approach has pragmatic appeal, it raises serious questions. Can we combine sample sources in a statistically-acceptable way? If not, will choosing and relying on one particular sample source generate a heavily-biased sample? Can we measure how biased this resultant sample is?

Seeing the coexistence

As the China market research industry enters its third decade, we are seeing the coexistence of several common modes of data collection, with strong growth in online methods. On the surface, China supports the same sampling and data collection methods used in developed markets, yet the day-to-day “rules” for operationalizing these methods can be completely different. China will continue to face the challenges discussed in this article, and research practitioners will need to be diligent in updating their understanding of the market and customizing their studies accordingly. | Q

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How many are too many?

Panel research providers respond to questions about their survey-invitation practices

Members of online panels are being inundated with invitations to take surveys. For some they arrive almost daily, reaching a peak of eight a day from the same panel. This has continued for almost a year for three researchers from our two firms, who joined one panel and stuck with it to see how bad it could get and how long it would last. One saved all the invitations and collected 600 in 10 months, an average of two per day (not including reminder invitations).

On the day before this article was submitted to *Quirk's* for review one of the authors received five more invitations from this panel provider, including three in 16 minutes! It was on this same last day that another of our researcher/panelists received four invitations from that same panel - in three minutes!

Were these just isolated cases? Or could excessive invitations be causing lots of people to drop out and resolve to never take another survey?

Beyond the problem of respondents dropping out, there is the issue of invitation bias. Suppose the panel provider is short of young males in two separate studies being conducted in the same market (health insurance and coffee) at the same time a survey on professional sports is being launched. Putting invitation limits aside, all young males in that market are sent invitations to all three surveys. Upon arriving home after work, Bill checks his e-mail and reads all three survey invitations. If he has time/patience to respond to only one survey, which one is it likely to be?

Potential respondents for the health insurance and coffee clients are being sacrificed for the benefit of the sports survey. Now, suppose Bill did answer all three surveys (consecutively). Would you want your survey to be the one he took last?

Worth looking into

It was obviously an issue worth looking into. In this case there was a firm resolve among both client and research company not to do business with panels that subjected their panelists to any kind of abuse, so our goal was to find panels that didn't. The rest of this article describes what we found - and provides some guidelines for dealing with online research panels.

Both ESOMAR and RFL Communications have compiled lists of questions to ask panel providers about their business practices. Both

snapshot

Concerned by the number of survey invitations they were receiving in their in-boxes, researchers at Bruzzone Research and Kaiser Permanente spoke to panel research companies to learn more about the firms' guidelines for contacting respondents.



By Don Bruzzone
and Jack Bookbinder

Editor's note: Don Bruzzone is president of Bruzzone Research Co., Alameda, Calif. He can be reached at donbruzzone@bruzzone-research.com. Jack Bookbinder is senior market research consultant at Oakland, Calif.-based Kaiser Permanente. He can be reached at jack.bookbinder@kp.org. To view this article online, enter article ID 20091105 at quirks.com/articles.

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contained questions about limiting invitations. A number of panel providers have published answers to those questions. So we started by examining all that we could find. Only half quoted any specific limit. Others often had fairly wordy answers that said, in effect, “It depends.” By the time we finished this project we learned a bit about how to read between the lines:

“We have built sophisticated sample tools that apply complex business rules to prevent panelists from receiving too many invitations.” (That means they have no firm limits.)

“We control invitations by limiting the number of surveys a panelist can take.” (That means there is no limit on the number of invitations that can be sent to panelists who have not taken a survey recently.)

The Advertising Research Foundation (ARF) conducted a promising study. It checked the quality of online research by comparing results from the same set of surveys conducted online among panelists from 17 of the largest research panels with results when the surveys were conducted by phone and by mail. Two of us from Bruzzone Research Co. (BRC) helped last year designing and launching the study. When the incidents of excessive invitations started, one of our first reactions was to see if the extent of the problem could be covered in the ARF study. However, at that point, the study was too far along to add anything to the questionnaire about how often respondents receive invitations to take surveys.

Earlier, a similar study in the Netherlands¹ had caused considerable consternation within the research community when specific differences in the performance of individual panels became known. So from the outset the ARF study promised panels that if they participated, no specific information about their panel or how it performed would ever be released. As a result, even if the ARF study had asked how often excessive invitations were received it would not have helped us identify the specific panels we wanted to avoid. At that point we set out to canvas the panels ourselves.

Since BRC had been involved

in asking panels to participate in the industry-wide ARF study we contacted them on our own with the following set of questions. We contacted 19 panels, 17 of which ended up participating in the ARF study.

- Do you feel it is necessary to control the number of invitations?
- Do you keep track of the number of invitations a panelist receives?
- What is the limit you try to maintain?
- How often do you exceed that limit?
- How do you limit them?
- Can we tell others how you answered these questions?

Only 12 of the 19 answered our first inquiry. Others openly objected, calling our questions “intrusive” and “incredibly invasive” and adding comments such as “it offended me,” “not something we discuss outside the company” and “answers taken out of context can only hurt us.”

Some asked if we could call and discuss our questions by phone. In spite of this evidence that some panels were reluctant to reply, we kept repeating our requests, explaining why we felt they were important and saying we eventually planned to write an article on the subject. Finally, after as many as three attempts, 17 of the 19 had replied in writing.

Another incident

Another incident showing panel provider reluctance occurred when BRC was conducting its annual study of Super Bowl commercials earlier this year. The study included a variety of questions to identify respondents who were not answering honestly, a set of questions that was reported on in an earlier *Quirk’s* article². They included questions about the number of panels the respondent belonged to and the number of invitations the respondent had been receiving.

We had submitted the questionnaire to the panel provider for checking well before the launch date. They apparently had not read it because we received an urgent call from the panel rep in charge of our survey hours before it was supposed to launch. He said they were sending

BRC a non-disclosure agreement that had to be signed before they would launch the survey. It said BRC could not release any of the information about their panel members without their approval. After complaining vigorously that the survey was being held hostage to suppress information all researchers should be collecting about panelists, BRC signed and the survey was launched. Three days later the head of the company and the rep were in our office to talk about the situation. It added to the body of information we were collecting on why panels were so sensitive.

What motivates them

It is always helpful to put yourself in the other person’s shoes and try and understand what motivates them. We listened to many representatives from the panels but we came away with the feeling there is just one basic reason underlying all their concerns: panel quality is often inversely related to panel profitability.

Heavy responders pay back what it cost to recruit them very quickly and then continue to produce virtually nothing but profit. They are the “cash cows” panel managers are reluctant to cut out. While we didn’t find anyone from the panels who would argue with the premise that the whole online research industry depends on its ability to deliver good, reliable and replicable samples, we did find a very human tendency to do everything possible to avoid those things that would reduce the profitability of their business.

We also heard a number of other reasons. (We leave it to fellow researchers to ponder their relative importance.) For example, panel recruitment and retention procedures are often viewed as valuable trade secrets. People had worked hard to develop systems and procedures they felt were more efficient than their competitors and they didn’t want to lose those advantages.

Reluctance to limit invitations can also be quite rational. One panel said a coffee study where all heavy coffee drinkers were used and then “rested” could bias a

study that followed on a tooth-whitening product. The survey would have been more accurate if there were no limitations on invitations and the tooth-whitening study had a sample that included its full quota of heavy coffee drinkers.

Another cited studies showing invitation frequency was not related to “bad behavior” or panel dropout rates; questionnaire length and complexity was.

Universal agreement

Seventeen of the 19 panel providers replied to our inquiries. Two never replied even after three attempts. There was universal agreement on several points.

- All 17 said that it is important to limit invitations, that they have procedures in place to do this and that they know how many invitations panelists get. Thirteen of the 17 went on to describe how they limited invitations.
- Some (three of 13) said they only limit the number of surveys a panelist *can take* and use that

to limit invitations. Most (eight of 13) have a direct limit on the number of invitations they will *send* their panelists.

- One said it had different limits for different types. Another asked panelists how many would be too many.
- Twelve of the 17 went further and stated what their limits were: The average was 15 invitations per month, but limits ranged from one a day to three a month. All 12 said they stayed within their own limits at least 90 percent of the time.
- The 12 who stated what their limits were and answered virtually all of our other questions were: Authentic Response, NPD, GMI, Research Now, Greenfield Online, Synovate, Harris Interactive, TNS, Luth, Toluna, MarketTools, PineCone/Nielsen. (The study was conducted just before Greenfield Online became part of Toluna.) Five more replied but didn't state limits. Again. Two never replied

even after three attempts.

- There was no evidence of falsifying answers. The two panels where we felt we had evidence of excessive invitations were both in the group that declined to state they had any limit on the number of invitations they would send to an individual panelist.
- None of the five who declined to state any specific limit said we could cite their results. Five of those who did state specific limits said we could tell others how they answered our questions, and they are shown below. They emphasized these were limits, not averages. They would allow *up to* the number of invitations shown.

Panel	Limit on Invitations Sent
Harris Interactive	Three per month
Toluna	One per week
Synovate	Six per week
Greenfield Online	One per day
Research Now	One per day

An enigma

All this led to something of an



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enigma. We asked the panels if they felt the following comment was justified: "Panels that only limit the number of surveys a panelist can take have a system that could still accidentally overload a panelist with invitations, if they happened to be in a category the panel was short on. For panelists who haven't taken a survey there would still be no limit on the invitations they receive." No one objected – including those who said this *was* the way they limited invitations.

But another statement that we asked panels to react to did generate some strong objections: "This has led some to speculate they [the panel providers] don't put any limits on invitations because it acts as an easy substitute for the more laborious job of screening out inactive panelists. If panelists are continuously getting a lot of invitations, that means they are not taking any surveys so the panel is not losing anything if they get irritated and drop out."

Several said if the above was

actually going on it was atrocious. It was the type of thing that could ruin the industry. With our documentation of excessive invitations being sent to three panelists continuously for almost a year it is hard to conceive of any alternative explanation. But their reactions did show sensitivity to the issue of excessive invitations, and some firms expressed hope for change if enough in the industry insist that all panels place limits on the number of invitations they send to their panelists.

Final thoughts

Some final thoughts on what we learned from this exercise:

- Despite the excesses of some panel providers, this article is not meant to be an indictment of all panel providers. To identify the more responsible providers you have to ask the right questions – and get answers.
- Get their answers in writing. We found a number of cases where

what was said over the phone didn't match what they put in writing.

- Study their answers carefully. Did they really say what you hoped/ thought they said?
- Talk to the panel firms about the problems you find. If they are never questioned there will never be any motivation to change.
- Don't just pick the lowest-priced panel. That is what started the problem in the first place.
- Clients who do not deal directly with panel providers should ask their research firm to provide the information as part of the evaluation of the research methodology.
- Finally, be sure to pick a panel that definitely limits invitations. | Q

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¹ Willems, Pieter; van Ossenbruggen, Robert; and Vonk, Ted. "The effects of panel recruitment and management on research results - a study across 19 online panels." ESOMAR 2006.

² Bruzzone, Don. "Sampling the impact," *Quirk's*, April 2009. [Enter article ID 20090404 at www.quirks.com.]



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The survey 'burden factor'

How important is the respondent's perception of survey length?

Over the years, there have been many published research projects that explore survey length, what the “ideal” length of a survey is and how length impacts respondents, their behavior and data quality. Some projects have explored the diminishing response and panelist retention rates that can accompany longer surveys, some have explored the risk of straightlining due to survey length.

It can be challenging to accomplish all of a project's research goals with a limited survey length. So, many researchers have explored a number of ways to overcome this issue – through survey design tips, breaking one long survey into two shorter surveys, and so on. In the world of online research, there are more challenges. It's critical for researchers to provide engaging experiences while fielding survey instruments that capture high-quality data.

Perception is described as the process of attaining awareness or understanding of sensory information. The problem with attaining an accurate perception of reality stems from the fact that humans are unable to understand new information without the inherent bias of their previous knowledge.

Do these same ideas apply in the field of online surveying? Do the types of questions (traditional vs. engaging) in a 30-minute survey have an effect on data quality and survey results, respondent behavior (the survey burden factor) and the respondent experience? Can you affect the perception of a survey being burdensome by changing elements of survey design to become more engaging and interactive with the respondent? We conducted research on research to answer these questions.

snapshot

Can you improve respondents' feelings about the survey experience by using more interactive question types? This and other related topics were investigated by three market research firms and they report their findings here along with offering questionnaire design tips.

Restaurant survey

A 30-minute survey was conducted among 1,132 e-Rewards Market Research panelists, 13 to 64 years old, with age and gender quotas to ensure balanced representation. The survey consisted of a screener, demographics and two question blocks with similar questions – one about quick-service restaurants (QSR) and the other about casual-dining restaurants (CDR). The QSR and CDR blocks were rotated (approximately half of the respondents received QSR questions first and



By Jennifer Drolet,
Alice Butler
and Steve Davis

Editor's note: Jennifer Drolet is vice president client services and moderating services at Denver-based iModerate Research Technologies. She can be reached at jdrolet@imoderate.com. Alice Butler is vice president at M/A/R/C Research, Irving, Texas. She can be reached at alice.butler@marcresearch.com. Steve Davis is executive vice president and COO at e-Rewards Inc., a Dallas research firm. He can be reached at sdavis@e-rewards.com. To view this article online, enter article ID 20091106 at quirks.com/articles.

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Arnaldo wants to have an up-to-date account of the rewards he's earned taking surveys.

Dr. Doe doesn't mind taking surveys, but he can be hard to contact.

Caroline is interested in how her survey answers relate to other people's answers.

Rick likes the personal approach he gets from being part of his online community.

Jess doesn't mind taking online surveys, but she hates being bothered by phone calls.

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the other half received CDR questions first). Each block contained awareness, usage and attitudinal questions.

Additionally, approximately half of the respondents completed a traditional version of the survey and half completed the engaging version. The survey ended with survey experience questions and 107 respondents completed online chats using technology from iModerate. Data collection spanned January 9 through January 13, 2009.

Significant differences

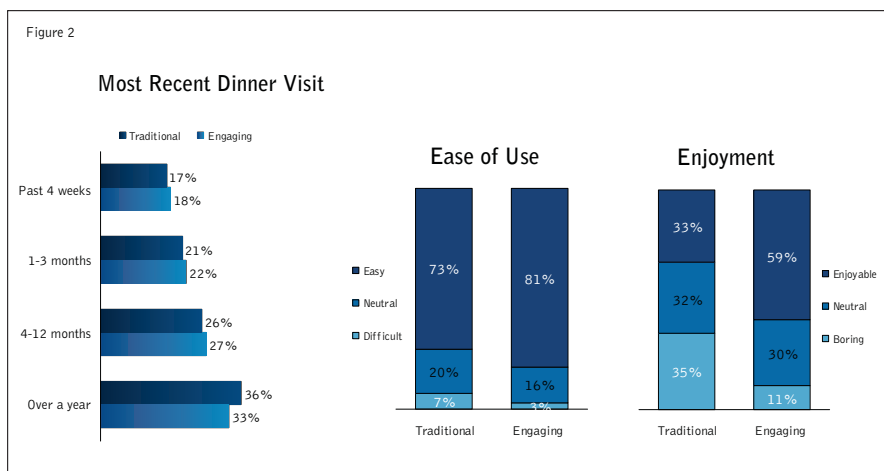
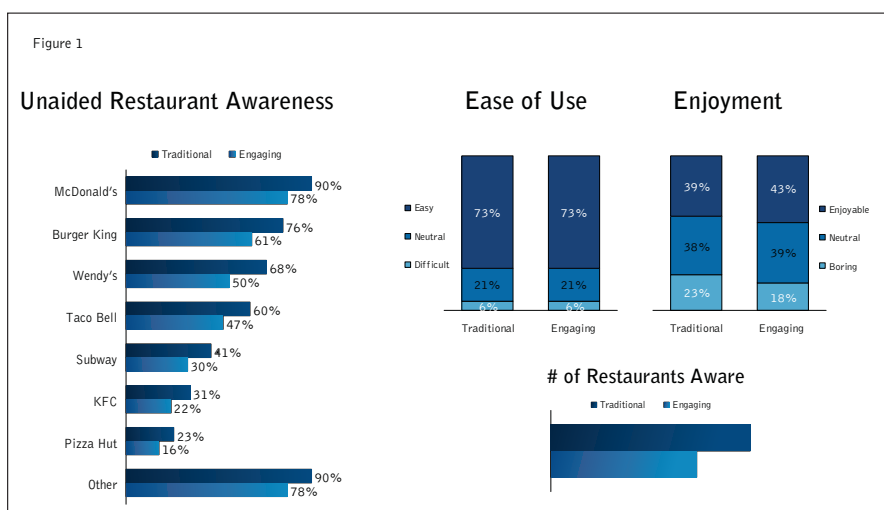
Some significant differences in different question formats were discovered. The five question types in both the engaging and traditional cells, as well as overall findings, are explored below.

Static boxes (traditional) vs. triggered boxes (engaging)

The first two traditional and engaging surveying methods that were explored were static vs. triggered boxes. To test the methods, respondents were asked to recall “What fast-food restaurants can you think of?” In the case of the static boxes, respondents were shown 10 boxes to provide 10 answers. In the triggered boxes, they were given one box initially, which if they completed, resulted in an additional box and continued until they quit typing or filled 10 boxes. (*Editor’s note: See box at end of story to find out how to view each of the traditional vs. engaging question types online.*)

The recall of QSR brands for those respondents with the traditional cell showed a 10 percent higher unaided brand awareness across most brands compared to the QSR brands recalled in the triggered boxes for the engaging cell. On average, the number of restaurants respondents recalled for the traditional cell (static boxes) was 7.1 QSR, compared to 5.2 QSR for engaging cell (triggered boxes). When provided with 10 boxes, respondents felt compelled to fill as many boxes as possible.

Respondents ranked ease of use and enjoyment nearly the same on



both types of questions (Figure 1).

Check-box grid (traditional) vs. logo card sort (engaging)

The next comparison explored usage of restaurants utilizing a check-box grid vs. logo card sort methodology. In the traditional cell, respondents were asked to check the box in the grid indicating the time they most recently dined at each of the CDRs, whereas in the engaging cell, respondents were asked to place each restaurant’s logo in the box indicating the time they most recently dined at the CDR. The percentage of respondents that visited a CDR within the time frames (past four weeks, one to three months, four to 12 months, and over a year) closely mirrored each other regardless of the survey experience.

However, when polled on ease of use and enjoyment of the two question designs, almost 60 percent of the respondents who received the question in the card-sorter format

(engaging cell) ranked the format as enjoyable, compared to 33 percent for those who received the traditional grid question. Thirty-five percent felt the traditional method was boring, and 81 percent felt the card sorter (engaging design) was easy to use, compared to 73 percent of the traditional-design respondents (Figure 2).

Respondents also provided some insightful comments supporting the ease of use and enjoyment of the card sorter format (engaging cell):

“I especially liked the questions where you moved the picture logo into the correct box.”

“I enjoyed the way that each section had a different method of input. I get bored selecting boxes all of the time. I especially liked dragging to pictures into the boxes. It felt like I was playing a game of solitaire instead of answering a survey.”

“I really liked being able to drag and drop the answers into the appropriate buckets instead of having to click in the circles - I always miss some! I could



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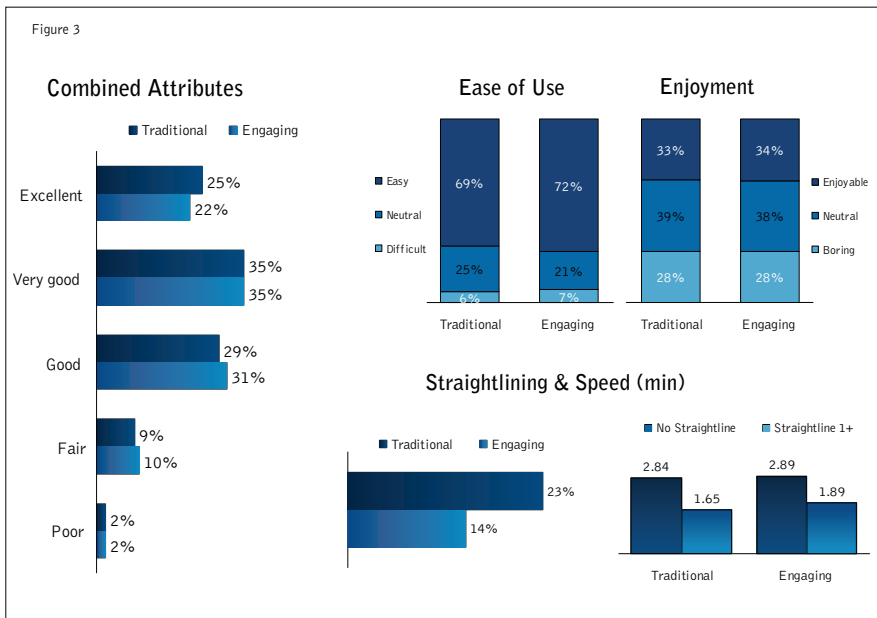
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ences and boxes. In my opinion, by the time you reach the bottom of the page, you tend to care less about how accurate your response is.”

Number-entry grid (traditional) vs. logo slider (engaging)

To test comparative ratings, respondents were presented with either a number-entry grid or logo slider and were asked to rank QSRs on characteristics like cleanliness, prices, quality of ingredients and more. Respondents of the number entry grid (traditional), simply entered a number on a scale of one to five to indicate their ratings. Respondents with a logo slider design moved the logo to place it under their rating. Again, the combined responses are very similar between the two cells, with slightly higher top-two box ratings in the traditional cell.

Nearly 80 percent of respondents using the logo slider felt the experience was either neutral or enjoyable, about 15 percent more than entry-grid respondents. And, when asked at the end of the survey what parts of the survey were most interesting, respondents cited the logo slider:

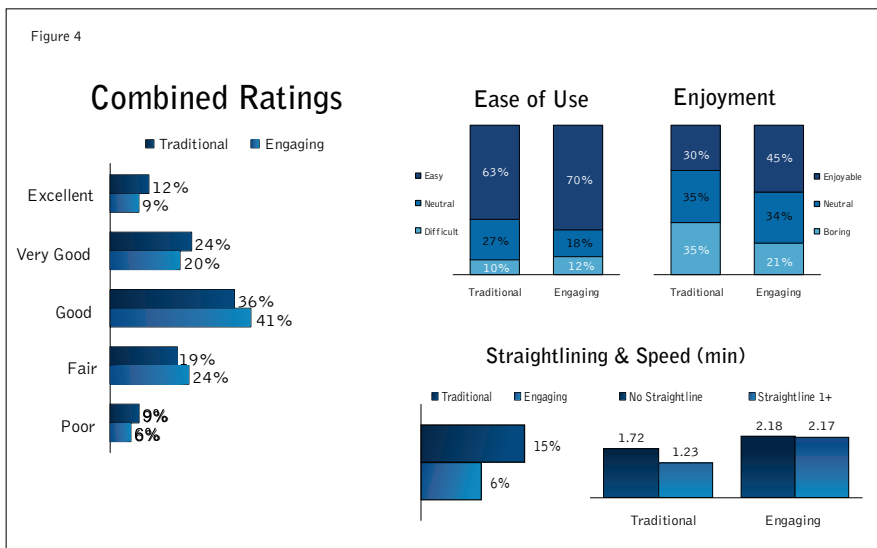
“I believe the drag and drop inputs and brightly colored brand logos with the companies name made it more enjoyable to take this survey.”

“[The most interesting part was] when I was comparing, I believe, KFC-McDonald’s-Subway and I had to drag the logo on a scale from 1 to 5 that answered the question given.”

Additionally, straightlining among the entry-grid respondents was two-and-a-half times that of the logo-slider participants.

Grid (traditional) vs. card sort (engaging)

In the last question-design comparisons, respondents were asked to determine the importance of various characteristics in selecting a fast-food restaurant. In the traditional cell experience, respondents were given a grid of 26 questions and ranked them as “not at all important,” “somewhat important” or “critical.” In the engaging experience, respondents were exposed to a card sort and asked to rate the importance by placing the card (containing the



change my mind on an answer without a problem, and the survey didn’t yell at me for missing a box.”

Long grids (traditional) vs. short grids (engaging)

The next comparison tested attribute grids. The first group of respondents received one long grid with 21 questions, and the second group of respondents received three shorter grids, each with seven questions. Both grids asked respondents to rank a CDR on various characteristics. The responses regarding the combined attributes of qualities regarding the CDR were very similar regardless of the survey experience, although there was a slightly higher top box in the traditional cell.

Respondents of both question-design types ranked ease of use and

enjoyment very similarly. However, respondents were a lot less likely to straightline the attribute grid if it was broken up into shorter pieces (Figure 3), and the qualitative feedback received clearly supported respondent preference toward shorter grids, and that there is a significant chance that data quality suffers when respondents are presented with cumbersome grids. For example, one respondent said, “I don’t mind the bubbles ... but there were seriously like 30 different questions in a line. I think if they were broken up into groups ... it wouldn’t have felt nearly as overwhelming. It reminds me of a bad Scantron test.” Another respondent said, “Well, it becomes tedious to look at a Web page filled with grids of products and boxes or experi-



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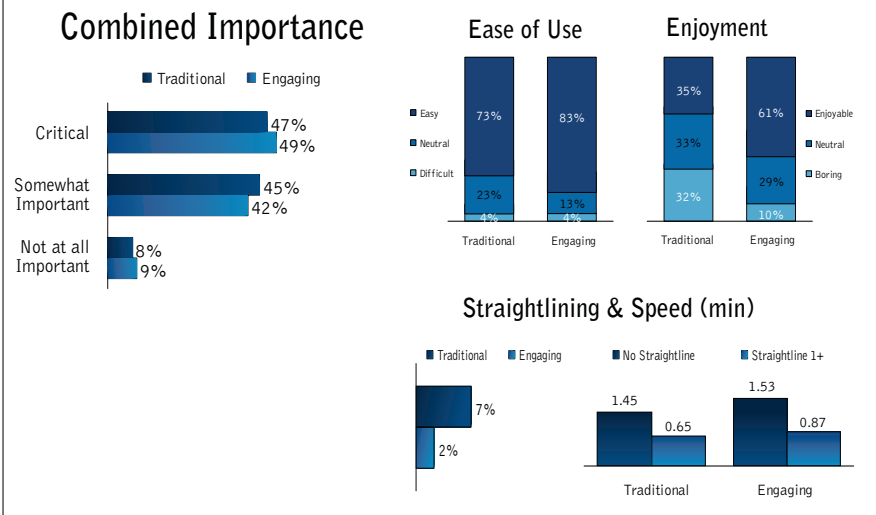
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Figure 5



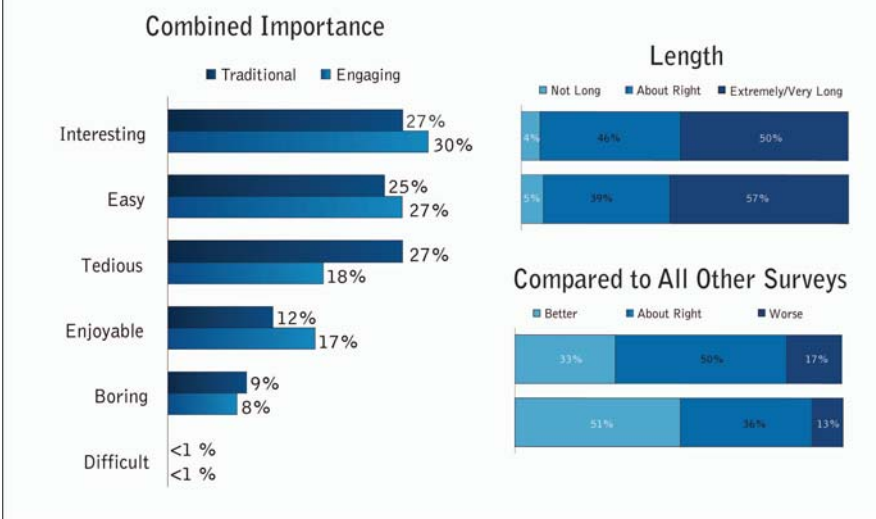
while the traditional experience had a 14 percent dropoff rate.

Visual interest

Overall, the qualitative discussion for the engaging cell focused heavily on the drag-and-drop and slider elements, which respondents felt were interesting, different and easy-to-use. And, in the traditional cell, several respondents specifically remarked that the survey could be made more interesting if it offered some visual interest or interactivity.

In commenting about the length of the survey, respondents in the traditional cell often thought the

Figure 6



Suggested quality guidelines

- When gathering unaided awareness, place separate boxes on the screen in order to gather the most responses.
- If the survey is over 15 minutes, place tedious and repetitive tasks early in the questionnaire.
- Insert engaging question types throughout the survey to keep the respondents interested.
- Limit the use of grids, especially long ones that require respondents to scroll.
- Use brand logos for rating questions when possible. It helps the respondents connect the rating with the brand.

characteristic) in the appropriate box (rankings).

The combined importance of the different characteristics of QSRs was very similar for both survey types. Eighty-three percent of respondents with the card sort ranked the question type easy to use as compared to 73 percent. In terms of enjoyment, over 90 percent of respondents were neutral about or felt the card sort was enjoyable, and only 10 percent felt it was boring versus 32 percent who felt the grid was boring. For this question comparison, 7 percent straightlined the grid, but only 2 percent straightlined during the card sort (Figure 5).

Interesting or enjoyable

The research showed that 47 percent of respondents put through

the engaging survey experience felt the experience was interesting or enjoyable compared to 39 percent of those with the traditional cell. Interestingly enough, more respondents taking the engaging survey felt the survey was extremely long (57 percent), versus those taking the traditional (50 percent), but then 51 percent of engaging respondents felt the survey was better, compared to all other online surveys, compared to only 33 percent of the traditional (Figure 6).

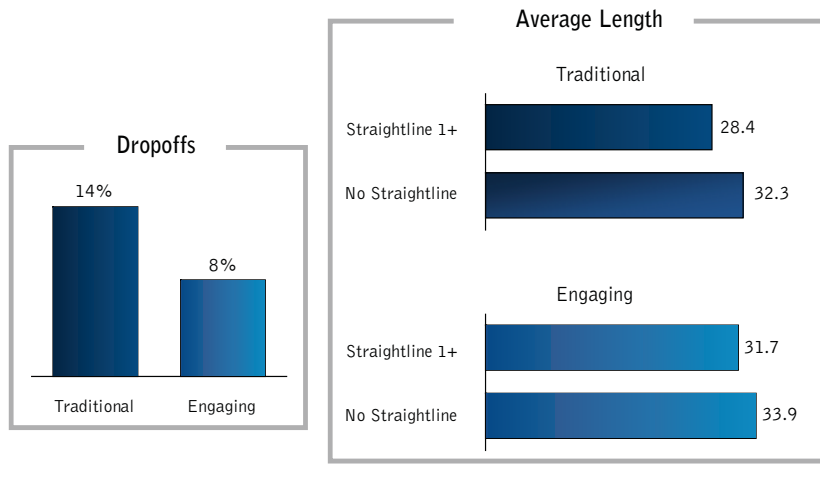
It's important to remember the topic (QSR and CDR), and that the topic (QSR and CDR), and that the survey was 30 minutes. Additionally, the average survey length did in fact take longer for the engaging survey (Figure 7). In exploring dropoff rates, the engaging survey experienced only an 8 percent dropoff rate

survey was long. Their impressions of length seem to be based as much on their sense of tedium as on the actual time spent completing the survey. For those in the engaging cell, despite the diversion of the interactive question format, respondents still often felt that the survey was long (and it did take longer than average to complete). However, because they weren't bored by it, the length was not particularly bothersome.

Have an impact

The way a survey is designed can have an impact on results and perception of survey length.

Figure 7



Particularly, making a survey design more engaging can: improve the respondent experience; decrease dropoff rates; change the way that some people answer questions; and decrease the number of inattentive respondents.

However, some respondents will become inattentive during long surveys, regardless of the survey experience you provide.

Each stakeholder in the research community has a responsibility in the process to ensure research is of the highest quality. (We plan to further investigate the survey result differences we saw in the traditional grids [higher top and top-two boxes], versus the engaging question methods we used.) Panel providers should identify and remove undesirable respondents from their panels.

And, researchers should carefully evaluate aspects of questionnaire survey design to see how it may impact the respondent experience and ensure that end-clients understand the impact that length and design can have on the experience as well as the data. | Q

Acknowledgements

The authors would like to acknowledge the additional contributions to the article from the following companies and individuals. From iModerate: Adam Rossow, vice president of marketing; Christy Tchoumba, senior director of client services; and Joan Rinaldi, senior director of technical services. From e-Rewards Market Research: Randy Medders, art director; Ashley Harlan, director of corporate communications; and Blythe Moore, public relations specialist. From M/A/R/C Research: Sarah Baird, senior data analyst; Kristen Downs, desktop specialist; Karen Shue, director of sampling; Susan Hurry, senior vice president.

Bonus Web content

The online version of this article (enter article ID 20091106 at www.quirks.com/articles) features examples of the five traditional vs. engaging question types mentioned in the article.

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Finding the strength in numbers

The value of consistency auditing of online panels

The very nature of survey research requires that online sample sources have robust quality standards. It is impossible to interpret market research results with confidence without a thorough understanding of the sample sources from which respondents are drawn. This is particularly important in the case of both tracking studies and multinational studies, where both validity and consistency are critical.

Since late 2007, our firm has been compiling and analyzing data for just such an assessment. The Grand Mean Project is an extensive study of global online panels. For the study, at least 400 respondents are collected from each participating panel. A standard online questionnaire, translated into local languages, is utilized, including a focus on buying behavior and a broad spectrum of other subjects. This program has collected data on more than 150 panels across 35 countries. In eight countries, at least five companies have participated, allowing the creation of a grand mean. In 17 countries, multiple panel data has been collected and in 10 countries one panel has participated. To our knowledge, it is the largest and most comprehensive online sample assessment to date.

Metrics must be reliable

Not all measures and references meet the requirements for auditing metrics. Being interesting and meaningful is only part of the equation. Metrics also must be reliable across multiple executions, panel types and countries.

Our objective is to measure differences in the panels, not necessarily differences in respondent opinions. Opinions may vary for any number of reasons. We need to measure variation due to the sample itself; variation due to drift – changes in the underlying sample over time – must be minimized. To minimize drift, we moved away from single-variable measures and are combining questions to create a more stable and robust metric.

Metrics must be global in that they cross international borders. For the purposes of market research we believe that the focus should be on buyer behavior and sociographic variables. Measurements should not require complete recalibration for each subsequent test. The measures should stand on their own and not require redefinition.

Increasing level of bias

A recent disruptive concept in survey



By Steven Gittelman
and Elaine Trimarchi

snapshot

Using findings from an ongoing study of global online panels, the authors make the case for the importance of understanding the impact of sample sources on market research results.

Editor's note: Steven Gittelman is president, and Elaine Trimarchi is executive vice president, of Mktg, Inc., an East Islip, N.Y., research firm. They can be reached at 631-277-7000 or steve@mktginc.com or elaine@mktginc.com. To view this article online, enter article ID 20091107 at quirks.com/articles.



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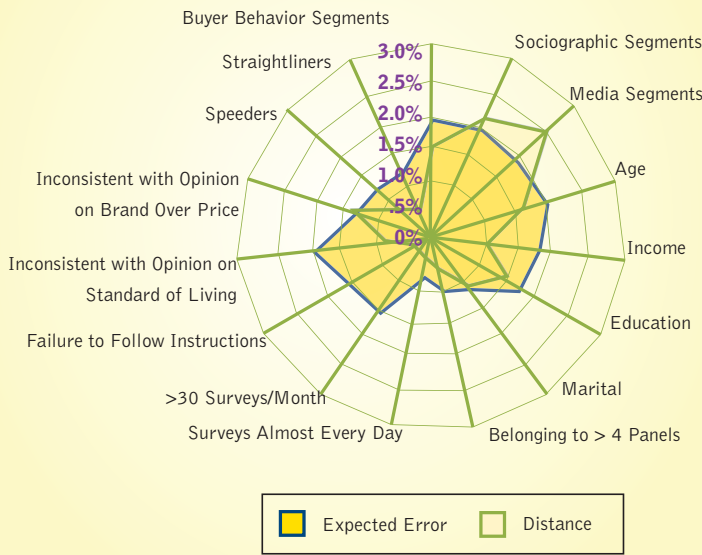
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Figure 1

Test Panel Consistency Summary: Average Deviation vs. Overall Average Values



research is the absence of a true probability sampling frame. While this is particularly the case in online research, even traditional telephone survey sampling contains an

increasing level of bias.

That said, samples are typically quota-controlled for census-based demographics. But the underlying source of respondents is not drawn

from a census. This is true to a varying extent for all types of data sources.

In the online sample context, the goal is to find a reference standard that can be used in lieu of the outdated telephone “gold standard.” The grand mean is the average value of all available panel data for a country or region. The overall average is the mean of available panels from a single source. This metric is the reference for consistency testing.

Three basic issues

There are three basic issues that must be addressed regarding panel stability, performance and quality: the effectiveness of quota controls in matching targeted demographics; the frequency of troublesome respondent characteristics; and examining the differences in the buyer behaviors and sociographic attitudes to understand the means by which the sample sources differ and how they might change over time.

For quality audit purposes, single-variable metrics tend to be unstable and may be less “reliable” than using combinations of variables for quality audits. There is stability in diversity; combinations of variables are less susceptible to outside influences. For example, the willingness to purchase a single commodity may vary due to local economic conditions, or, more importantly, changes in the marketplace over time.

This problem is most associated with attitudes and behavior, while fact-based information, such as demographics, is less susceptible. We are particularly interested in the stability of behavioral distributions; particularly purchase behavior, the key variable most market research is designed to measure.

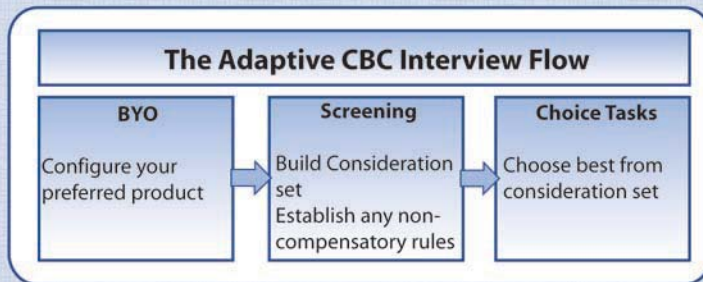
We have used a form of structural and market segmentation to provide stable metrics for attitude and behavior issues. The structural segments are based on 30 or more variables covering a specific area of potential interest. Three segments we have used in this research are: buyer behavior, sociographic factors and media use.

Capture the variability

For the purposes of this article we will be referring to the data source as “Test Panel.” This panel comes from

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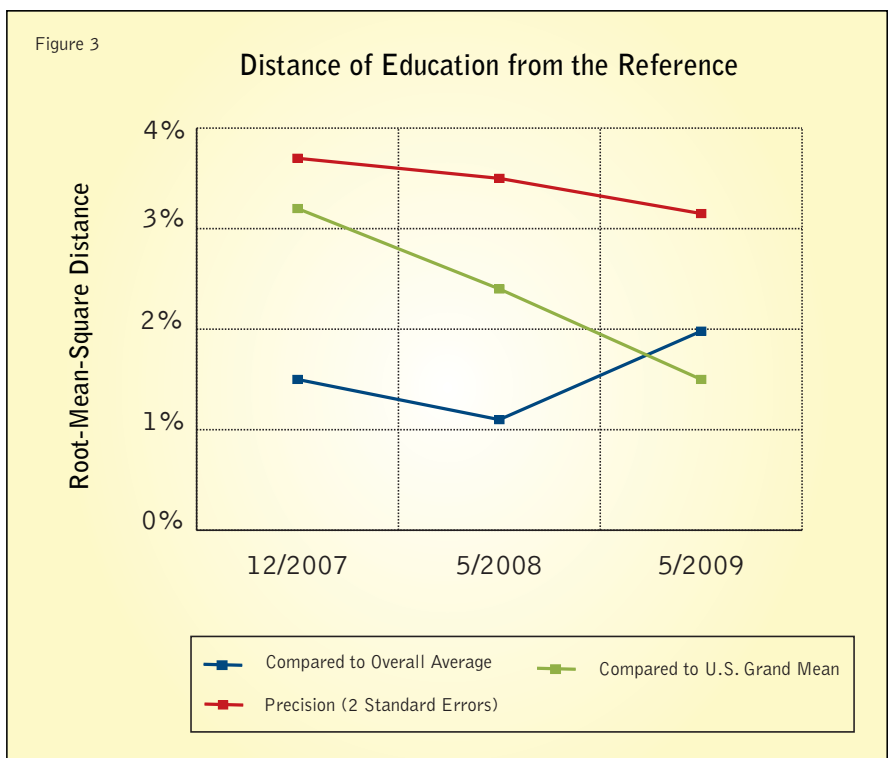
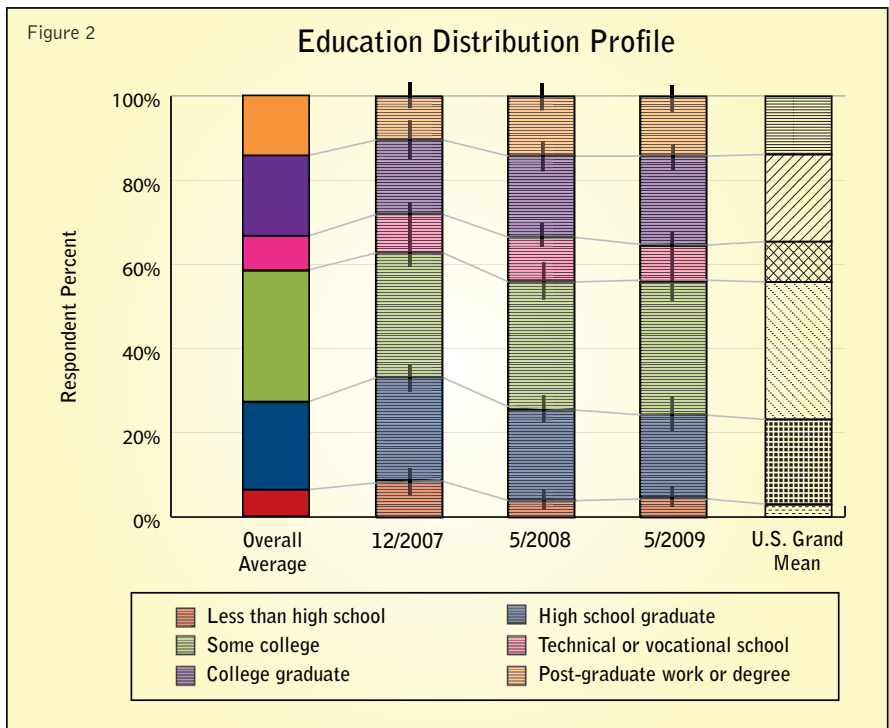
The objective of this program was to capture the variability over time in the use of a single source of online respondents. Test Panel provided samples on three occasions (December 2007, May 2008 and May 2009). On each date Test Panel supplied sample for the completion of 400 interviews.

The testing procedures were based on the execution of a standard questionnaire. Questions were selected to allow a consistent standard and independent assessment of the panel or data source. In this and all other cases, samples were provided by the source supplier using deliberate instructions to use their standard methods of respondent management and incentive delivery.

The internal reference for analysis is based on a moving average of the data series¹. Note that this is a bootstrapping process, where the internal reference is recomputed for each consistency report. As more data in the series is available, the average reference values are expected to become increasingly stable. A one-year moving average is used.

Measures of structural characteristics of the panels and data sources are best reflected by the distribution of attributes rather than single-point values. These include the demographic and segmentation characteristics. However, due to the multiple values of these distributions, the collective measures of comparisons are necessary in order to highlight differences and to establish consistency measures.

- Variation and error. Stacked bar charts are used to show the time-series results of the sample set along with the appropriate references.
- Distance measure of variation. The root-mean-square distance² measure is used to indicate detail in the differences between distributions. A measure of the expected error³ is also given. This is useful to distinguish between statistically significant differences and those that are important in terms of consistency. Note that due to the use of two standard errors, this is a strong test for inconsistency⁴.



Within the error bounds

The results of the average consistency of the sample sets compared to the overall error bound for the various metrics are shown in Figure 1. In terms of overall consistency, 87 percent of the metrics (13 out of 15) for the average deviation across Test Panel sample sets were within the error bounds⁵. When considering only larger inconsistencies (greater than a 25 percent discrepancy over

one standard error) this becomes 93 percent, with only one metric significantly outside the error bounds. The largest percent contributor to the overall average inconsistency across sample sets is media segments, with a 25 percent difference from the expected error.

One would expect the demographics of a sample to reflect the population. For these sample sets, quotas were requested based on census

Figure 4

Standardized Buyer Behavior Segment Profiles (4 Clusters)

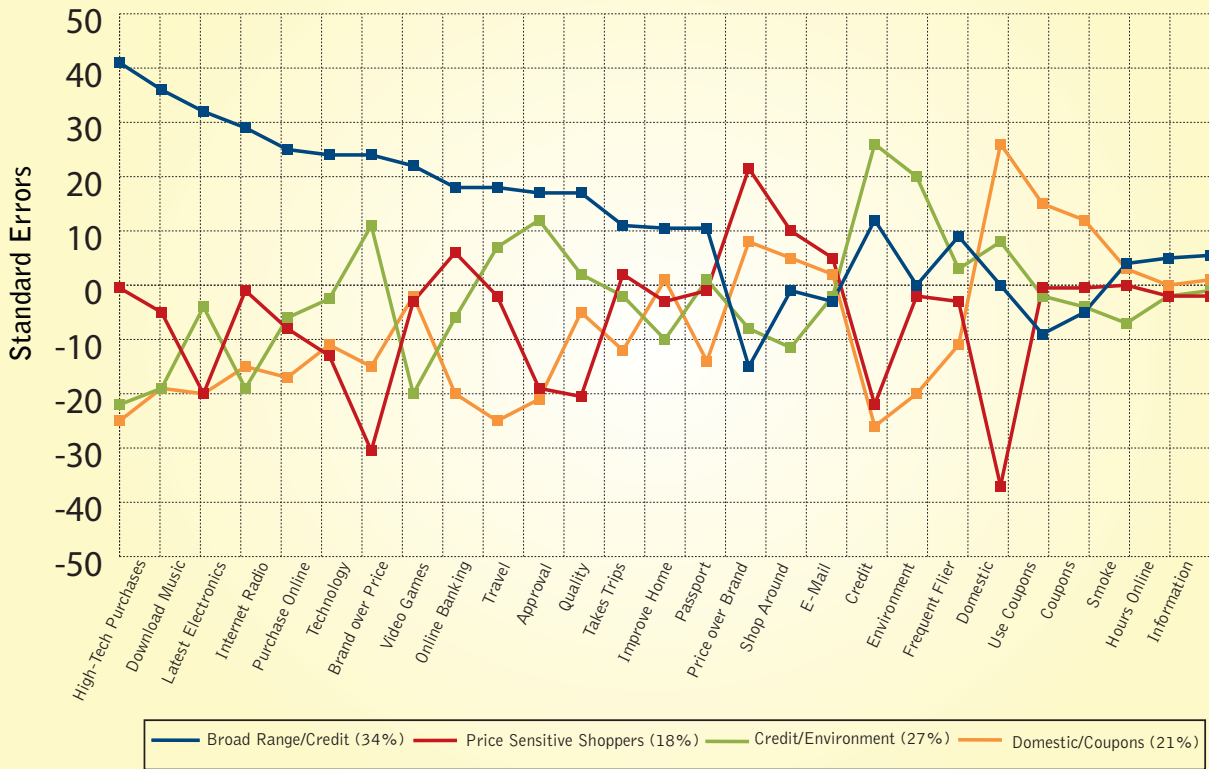


Figure 5

Buyer Behavior Segment Distribution Profile



data. Unless there was some error in the process, the resulting demographic distributions of these quota-controlled variables should be in line with those of the population. Age and household income were controlled by quota in this study. However, there were several other demographic characteristics

measured that should be aligned with the reference though they were not controlled by quota including: education and marital status.

We use the distribution of education to illustrate demographic consistency analysis. Note that educational attainment levels were not

quota-controlled. As such, they are likely to vary between the source data and grand mean.

Figure 2 compares the education achievement distribution for Test Panel to the overall average and the grand mean. The error ranges are indicated by the vertical black lines at the end of the groups. There does appear to be difference between the May 2009 sample set and the overall average values⁶.

More details on the deviation can be seen on the distance measures shown in Figure 3. The distances between all sets and the grand mean are below the expected error.

Filtered to balance

In the previous section, we examined demographic measures to assess consistency of sources over time. These reflect the operations of the sample source but not the consistency of the respondents. Typically, online sample sources are filtered to balance demographics against some external standard such as the known general population. However, this does not ensure that the source maintains the targeted group of respondents.

Structural segmentation is designed to capture the distribution of groups, or segments, of respondents which, if different, are expected to impact the studies executed using these sample sources.

As mentioned, we used three segmentation schemes in this evaluation, 1) buyer behavior, 2) sociographic factors, and 3) media use factors.

We use the analysis of the buyer behavior segments to illustrate consistency auditing. The buyer behavior segments are intended to capture the variability in the attitudes and actions regarding the purchase of a broad range of products.

The standardized profiles for the selected U.S. sources are shown in Figure 4 and reflect the response to 37 input variables.

The titles of the segments are drawn from the variables of greatest impact for the segment. The purpose of this scheme is to reflect differences between sources of data and the general grand mean representing that region.

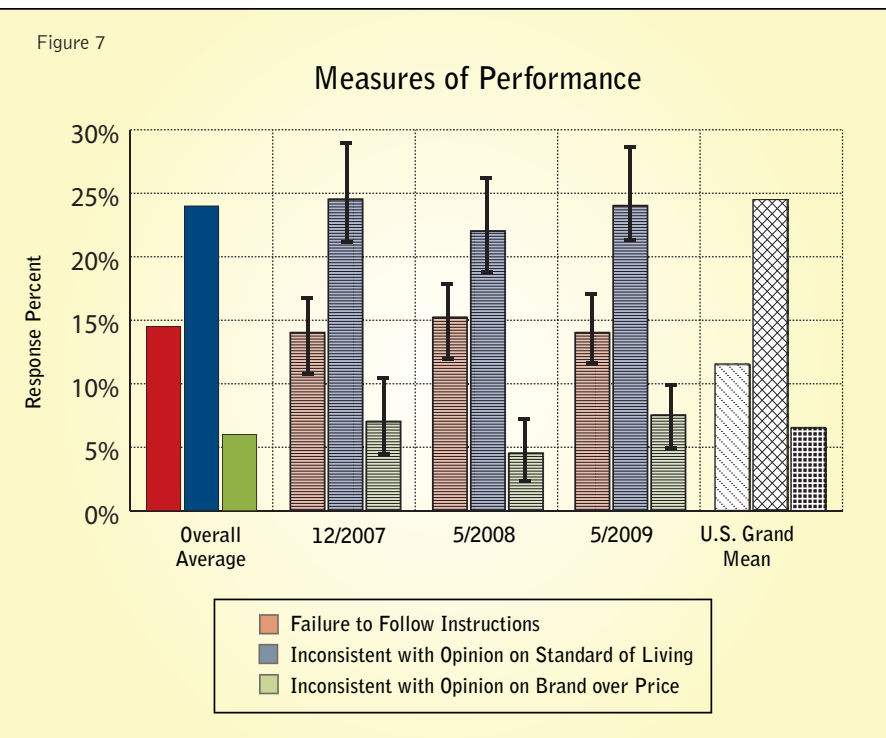
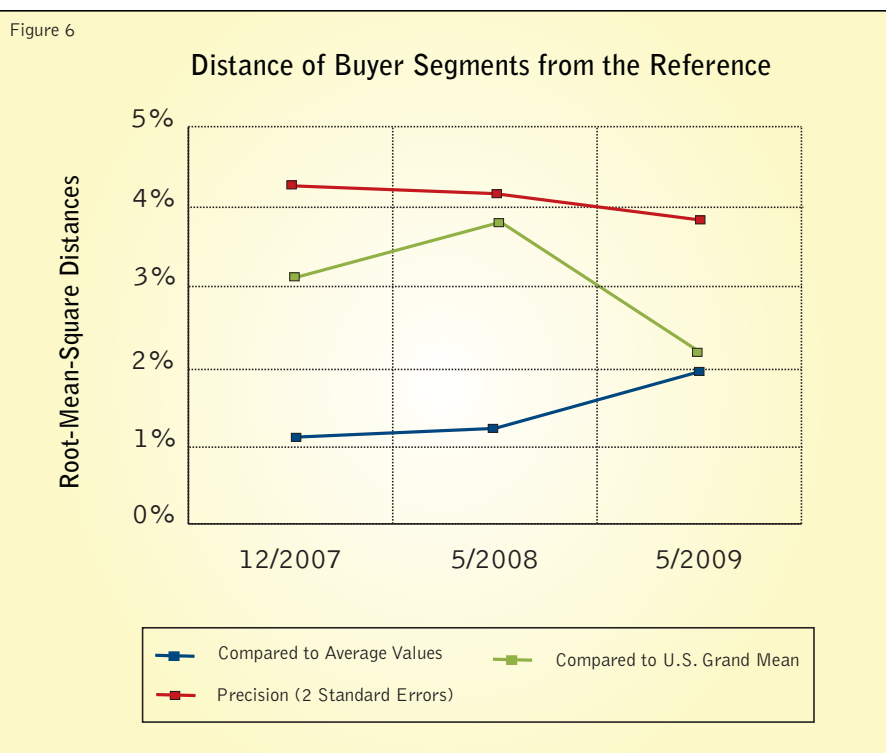
It is important to note that the distribution of these segments is expected to and indeed does vary widely between different countries and global regions. However, we expect the distribution of these segments among sources within regions to be less variable. Furthermore, we expect the distribution of segments to be consistent over time within a panel or source.

Figure 5 compares the buyer segment distributions for Test Panel and the overall average and the grand mean. As with the other variables, the error ranges are indicated by the vertical black lines at the end of the groups. There does not appear to be a major difference⁷ between the May 2009 sample set and the overall average value in the buyer behavior segment distribution.

More details on the deviation can be seen on the distance measures shown in Figure 6. The distances between all sets and the overall average are below the expected error.

Fundamental issues

There are several types of metrics that provide measures of effective panel and respondent behavior. As men-



tioned, these are often fundamental issues reflecting the mechanism of generating and encouraging participants. While each of these measures reflects the propensity of respondents to generate erroneous responses, each one in isolation may only be a random error. However, we would expect the appearance of these effects to be consistent.

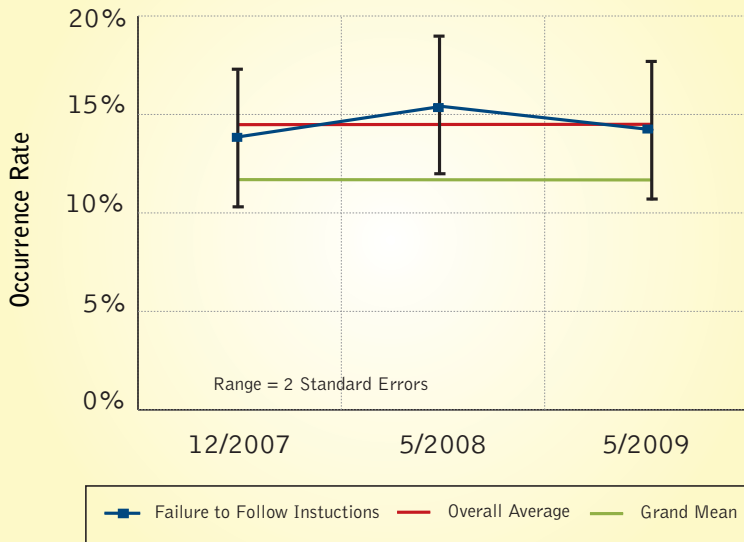
There are three basic sets of respondent behavior: performance,

characteristics and satisficing. The incidence of errors in the execution of questionnaires reflects the quality of the panel and is referred to as performance. These are quality checks designed into the test instrument. They include but are not limited to: 1) inconsistency in responding to multiple questions and 2) failure to follow instructions.

The characteristics or structure reflect the nature of the participants

Figure 8

Occurrence of Failing to Follow Instructions



for a measure of improper action. The test instrument has two types of items: 1) questions with designated answers that require specific action; the failure to do so is viewed as a violation, and 2) inconsistencies, where two balanced but opposite questions are asked; answering both strongly positive or both strongly negative is another type of violation. Figure 7 shows the results for the Test Panel sample sets and the references.

The questionnaire had one instructional or trap question where the respondent was specifically required to enter a specific set of values. If an improper response was given, the incident is considered a “failure to follow instructions.” The other two measures capture inconsistent responses: happy/unhappy with standard of living and brand over price/price over brand. As noted above, these measures are based on having given either strong positive or strong negative values in both directions.

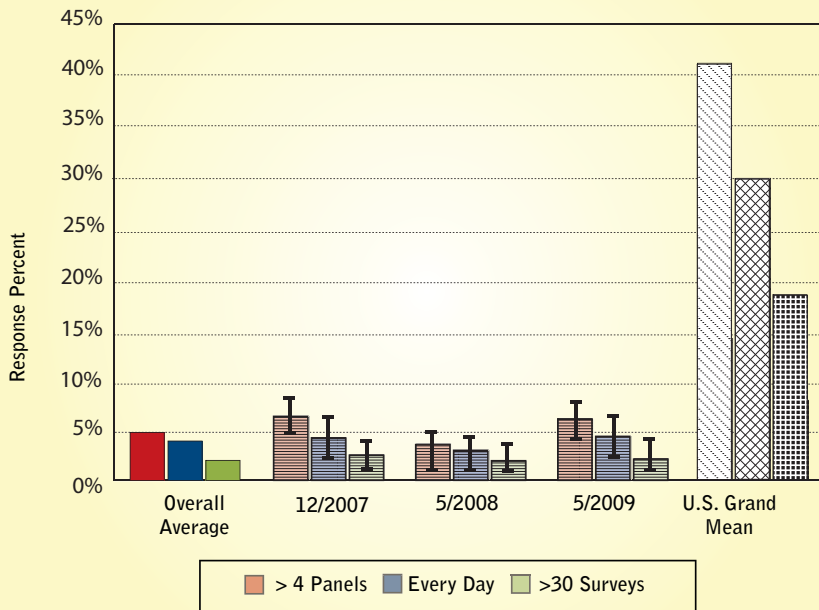
The control chart in Figure 8 indicates the occurrence of respondents failing to follow instructions for the Test Panel sample sets, and it illustrates the consistency testing of the performance factor. The black line represents the occurrence rates. The bars are the error range (95 percent confidence level). The red line indicates the overall average, and the green line is the grand mean reference.

The deviation of all respondents failing to follow instructions for Test Panel sample sets compared to the overall average was within the expected error. The largest deviation from the grand mean for failing to follow instructions beyond the error bound is 0.2 percent for the May 2008 sample set.

Hyperactive survey respondents are members of panel or other online data sources who take surveys too frequently. Hyperactive respondents are measured here in four ways: 1) belonging to five or more panels; 2) taking surveys almost every day; 3) having taken at least 30 surveys in the past month; and 4) relatively long panel tenure. As self-assessments, these measures could be in error, but they do represent consistent metrics.

Figure 9

Frequent Survey Takers



in the panels. In general, these focus on issues and concerns with the long-term maintenance and in particularly the tendency to contain professional survey-takers. These metrics may include participants who belong to multiple panels, have been on panels for an extended period of time or who take multiple surveys frequently.

Respondents occasionally show extraordinary characteristics. These are not errors, just extreme behavior, which warns of the possibility that questions are being skimmed with

little thought behind the answers. These are referred to as satisficing behaviors and include: speeders, who finish their questionnaire in extraordinarily short time, and straightliners, who tend to give the same answer to a large number of questions.

The quality of results for Test Panel compared to the references is measured by the frequency of improper responses. The quality of survey results is often difficult to measure. In this testing procedure, specific trap questions were used that allow

Figure 9 shows the results for the Test Panel sample sets and the references for the occurrence of frequent survey takers. Notice that the grand mean values are much higher than this data source. This indicates that the members of this source are less susceptible to frequent survey-taking, and they belong to fewer panels than the general online community represented by the grand mean.

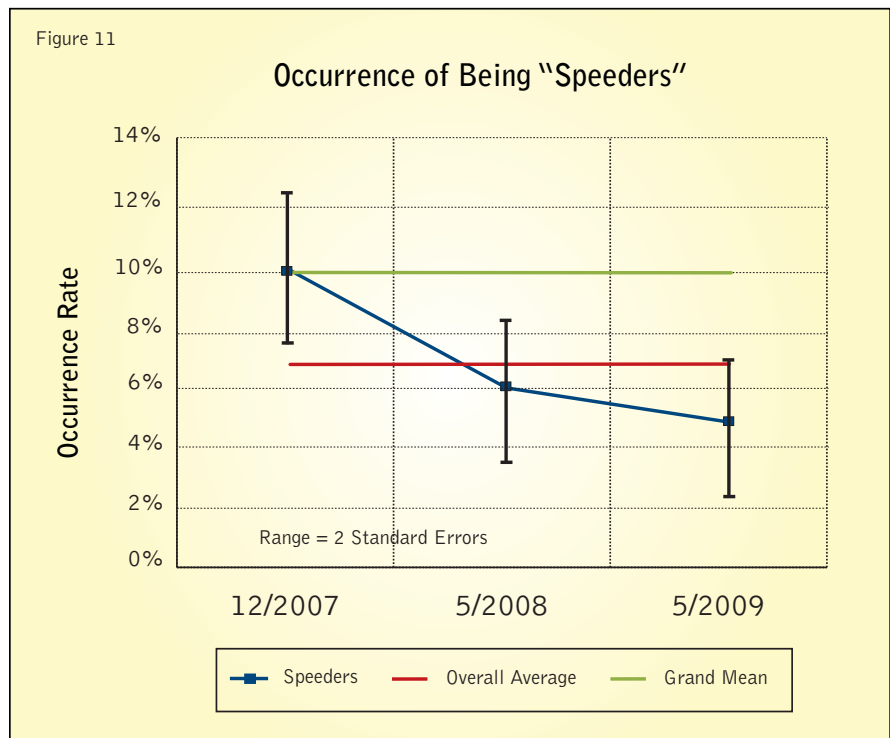
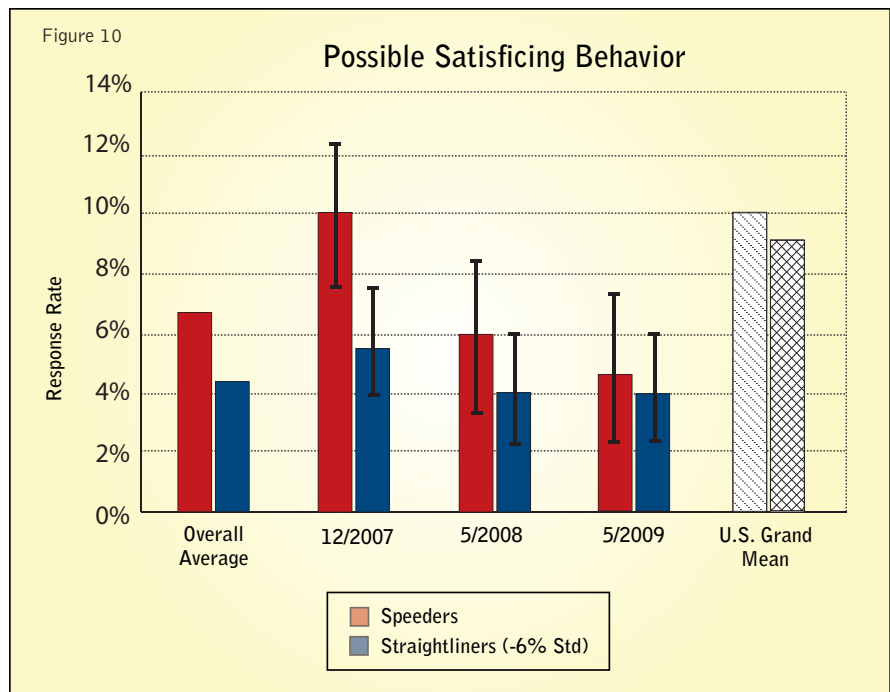
So far our analysis of performance characteristics has focused on errors made by respondents in their participation in surveys and panels. There is a third category of activities that is thought to likely affect the quality of results. These are participants who either speed through the survey (speeders) or those who give similar or identical values to blocks of questions in the surveys (straightliners). These respondents can be viewed as potential satisficers. However, once again, there is no direct evidence that such behavior results in poor-quality survey results.

Figure 10 shows the overall results for the Test Panel sample sets and the references for the occurrence of satisficing behavior. Consistency testing is shown on the following control charts, indicating the performance of each sample set with the same corresponding error bound as used here, along with indications for the overall average and the grand mean references.

The control chart in Figure 11 indicates the occurrence of respondents being speeders for the Test Panel sample sets, and illustrates this kind of analysis. The largest deviation from the overall average for being speeders beyond the error bound is 1 percent for the December 2007 sample set. The deviation of all respondents being speeders for Test Panel sample sets compared to the grand mean was within the expected error.

A new era

Online market research has moved into a new era, from a probabilistic framework to “working without a net.” The explosion of online research is not the root cause of the erosion of our probabilistic framework; its origins go far deeper. Random-digit-



dial samples once provided this industry with the ability to relate back to a sampling frame rooted in the census. If we made enough callbacks, converted refusals and adhered to strict calling patterns it was possible to approach a random selection of households that seemingly gave us a reasonable facsimile of a probabilistic world. Alas, phone research would have run into trouble as technology confounded its very way of being. It was nice while it lasted but mobile phones have proliferated to a degree

that pure telephone sampling just cannot carry the day: there are too many non-landline-using respondents.

Online research has been troubled from its advent. Our fondest wishes cannot grant it a true probabilistic frame: the offline population is different from those online. Early on we turned to phone-online comparisons to provide credibility to our new format. One has to wonder if our efforts were not misguided in the first place. As the telephone standard drifted from gold to brass we were

seeking a safety net in the wrong place. Telephone built itself on the back of earlier methodologies and by now would have suffered its own sordid demise. To compare online to telephone is misleading. The question arises: Is there a true probabilistic sampling frame remaining in market research?

In the absence of a probabilistic net to anchor samples, they can drift without our knowing. It is appropriate for the industry to run parallel studies on panel sources to

measure consistency through time. We propose that the grand mean allows us to compare the results from consistency measures, grounding them in a dual metric. Shifts that may be measured can be used to clarify changes that might appear in normal tracking work.

In an ideal world, all panels would regularly test for consistency. Their combined consistency data could be compiled to generate a grand mean within a market as a new reference to anchor panels and

tracking studies alike. The composite data would provide rich insights into shifting in the sample universe and inconsistencies within individual panels. If needed, source-blending using optimization modeling could serve to correct drift. Consistent bias (the mere use of the word “bias” brings a shudder) could be monitored against the metric. The opportunity exists to anchor our research, bringing light to a situation that currently lacks transparency. | Q

References

¹ This is not typical for most quality-control situations, where the reference is usually set at some requirement or specification, and is therefore automatically fixed. In this case, the historical average was used and therefore, varies between consistency reports.

² The root-mean-square distance is defined as the square root of the average of square of the differences between the distributions elements.

³ These are taken as the square root of the average of the squared errors (note that these are taken as two standard errors).

⁴ The chi-square test indicates the likelihood that two distributions of values are the same. It is a collective test of consistency based on variation. This is usually also given as a comparison between the various datasets and the references. However, it tends to emphasize specific differences. While the chi-square measures are useful to provide a broad view of the fit between distributions, it does not yield details of the fit. It does show the degree of fit.

⁵ Deviations: Distributed parameters are based on the root-mean-squared value of the deviations. Single-valued variables are taken as the simple difference between the value and the reference. Error range: The error range for the distributed parameters were taken as the root-mean-squared values of the standard errors.


⁶ Based on the χ^2 statistics, which measure the significance of the difference between distributions, the largest deviation was a 37 percent agreement for the May 2009 sample set and the overall average distribution. The largest deviation was a 0 percent agreement for the December 2007 sample set and the grand mean distribution.

⁷ However, the significance, if any, needs to be explored based on the χ^2 test below. Based on the χ^2 statistics the largest deviation was a 65 percent agreement for the 5/2009 sample set compared to the overall average distribution for the buyer behavior segments. The largest deviation was a 5 percent agreement for the 5/2008 sample set compared to the grand mean distribution.

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Consider your audience, hone your message

Guidelines for better market research communications

Brilliant men and women have brought us to new heights of sophistication in constructing samples, building questionnaires and analyzing data. Why, then, despite all this great work, do we market researchers continue to experience the frustrations of being misunderstood, or worse, ignored by people in our organizations?

I asked several marketing professionals in major corporations around the U.S. about their communications with the marketing research team. Here are some examples of their responses: “I can tell they work really hard but we often can’t understand what they send us.” “I don’t know if I can trust the researcher to really understand what the findings mean in marketing terms.” “This information is just so technical, I wish they would bring it down a notch.”

Clearly, barriers to good communication exist within both the marketing research departments and the departments they support.

Part of the explanation involves the academic orientations of professional researchers. With backgrounds in data collection and analysis, we’re inclined to focus on the merits of our designs and methods and overlook the deliverables. Additionally, timetables simply don’t promote good communication. After slogging through a long project, it’s tough to consider spending even more time developing a plan for presenting the results; at this point, we’re on to designing the next study! Finally, project budgets generally don’t include funds to create deliverables.

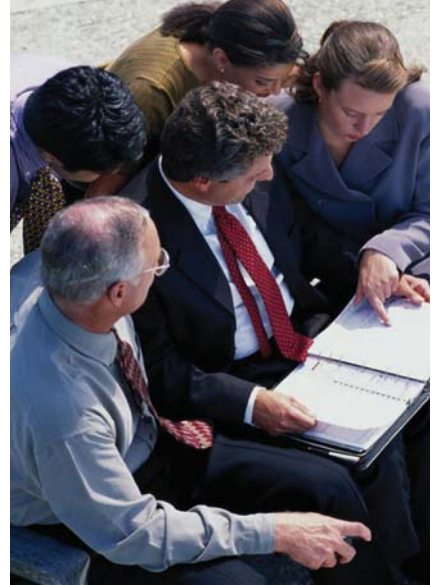
Clients, meanwhile, are bombarded with e-mails, presentations and reports, but find it next to impossible to consume all this information because they’re stuck in meetings all day. When it takes longer than a few minutes to review something, by necessity, they skim, skip or shelve it, hoping to get to it “some day.” A researcher may want to show the bells and whistles; some clients simply want them to get to the point.

Marketing researchers may also notice their clients asking for the same information over and over. Some functions need certain kinds of information on demand, in real time. This suggests that the formats and archiving of information need revamping to accommodate easy, real-time access and searching.

Here are some suggestions for building better communications between research teams and their internal clients:

snapshot

Finding a disconnect between corporate researchers and their internal clients, the author explains how to communicate market research findings in ways that address and respect your end users’ needs and time constraints.



By Jan Bleyaert

Editor’s note: Jan Bleyaert is principal of Capture Research LLC, Boston. She can be reached at 203-788-4850 or at jmbleyaert@captureresearch.com. To view this article online, enter article ID 20091108 at quirks.com/articles.



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1. Build skills within the team.
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Establish goals

Before the study begins, the researcher should establish communications goals. I prefer the term “communications” to “reporting.” The word “report” literally means, “to give a formal account of,” “to relate, as what has been learned by observation or investigation.” Communication is more interactive. In effective communication, the receiver of the information emerges changed, and success is now defined, not in terms of production output, but in terms of impact. This is a better standard for marketing research. The criterion for success now becomes whether the goal of the communication – be it learning, inspiration, data usage, persuasion to a point of view or some other metric – was reached.

Once goals are formulated, the project design should include a communications plan. One way to envision this is to write a generic statement of what the raw findings are expected to include. Facts should be listed in order of importance and should be summarized in what journalists call the lead. The plan also needs to explicitly name constituencies that should get the information and how they are likely to use it. The plan should address, based on what is being communicated and how it will be used, a distribution plan including timing of release (information may be released all at once or sequentially). And, finally, it may be necessary to add a feedback element that allows users to discuss the results among themselves or directly with the research team.

It is helpful to distinguish between research-as-news versus research-as-decision-tool versus research-as-inspiration. In other

words, “I need to know about it” is different than “I need to know it” or “I need to be aware of it now but reference the details later.” You may eventually need to design different forms of the message to address these needs. This sends clients a message that we truly care about and understand what they need, and we’re going to work toward giving it to them in the best possible format.

In reality, sometimes a researcher is too junior or too new at a company to design such a plan without assistance, and it’s appropriate to enlist clients for support. Sometimes, however, the client has a limited perspective on objectives and constituencies. (Many marketing researchers would liken the defining of study objectives, particularly when there are multiple clients, to the herding of cats.) Certainly, even well-integrated research departments can’t always know every implication in advance and the truly important recipients of your final insights may lie beyond the immediate client list. A little proactive attention and flexibility in the design will help accommodate these contingencies.

Considered carefully

The original source of your message should be considered carefully. In many instances, the ideal source for your information may not be in marketing. For instance, if your project’s ultimate objective is to improve the effectiveness of the sales force, it may be better for the research to come from a leader in sales. In some cases, it’s quite effective if deliverables include observations from both the client who sponsored the research and the research lead. A trusted, well-chosen source can add substantial weight and, in some cases, actually become a part of your message. However, when a source of information is not considered credible or trustworthy a “discounting” effect occurs.

I queried marketing researchers in several different companies to find out who presents research results within their firms. Some admitted they often have their

research vendors do it. This may be expedient (and sometimes politically desirable), but as a common practice it may erode the authority of the research team. With vendors continually communicating insights to clients, these same clients may, over time, view the research department as administrators and vendors as the real “brains.” The research team is also in a better position to provide valuable context for the information not available to an outside firm. When a researcher handles the communications, clients perceive him or her as a credible point person for additional questions. Due to time constraints, this practice may not be possible for all projects, but should be the rule for important, high-visibility projects.

It may also be helpful to keep in mind that the source of your information will become blurred over time. People often forget where they heard something, a phenomenon called the dissociative cue effect in which, over time, the mental “tag” indicating the source detaches in memory from the message. Hence, it’s a good practice to reinforce the original source somewhere within the content.

Most persuasive

Recall from basic psychology that direct experience is the most persuasive source of information. (This is part of the reason – to the frustration of many marketing researchers – that a few idiosyncratic statements in a focus group can outweigh reams of objective, carefully collected data.) However, when possible, having others in your company experience the consumer’s point of view firsthand is more powerful than presenting secondhand observations. Obviously, this must be managed carefully. The risk is that executives may jump to the wrong conclusions based on only a handful of consumers, but I would argue these risks are more than offset by the benefit of having advocates in high places for the customers’ point of view. A formal debriefing at the project’s conclusion will help identify and reinforce the observations

that seem most consistent.

You can also create additional awareness of your message by purposefully building internal buzz. Present the research to 20 people, and there are now 20 additional delivery points for the information. Give the people at your presentation the tools they'll need to be able to spread the word. Audience members can be given pocket-sized fact cards to encapsulate key points and which include contact information or a Web site for more information. Craft the message carefully, create ambassadors for your results and the important points will travel around the company. Rarely do large PowerPoint decks handed out at the end of a presentation have this effect, and only a few may want this amount of detail after the presentation.

Much more skillful

Marketing research results are most often presented in-person to a small group as a PowerPoint deck that is then sent via e-mail to others on request. However, when we consider the ways and reasons people will use this information, we can be much more skillful in packaging it. I'm often amazed at how many times I've received a PowerPoint presentation via e-mail and was expected to be able to figure out what was going on after reading through a series of cryptic bullet points and diagrams. Where and when will this be seen and how will the information be used? Will someone always be there to present it or does it need to stand alone? Is it something designed to provide detail for people to be able to go back to, as a reference, or is it simply designed to have a single impact or change a perspective, or both?

It may be helpful to revisit how we structure marketing research reports. Our default approach, originating in academia, includes these general headings: background; methodology; executive summary; detailed summary; recommendations.

But it's hard to imagine an academic being asked to make a million-dollar decision within a

three-month period based on as much information as he or she could get as quickly as possible. I suggest a better format is one that media organizations developed long ago, and one that works best for busy people:

Main Headline

Subhead One

Detail

Callouts

Subhead Two

Detail

Callouts

Implication/Conclusion/What's Next?

This is but one of many designs that are more amenable to business and originate from the field of journalism. The structure allows individuals to access content based on how much detail they need and helps them quickly get back to the information they need.

Many research departments use report formats as an attempt to brand themselves internally, and this is fine. But ideally, the form and structure of your information will be determined in large part by how the information will be circulated and used by people. The form your information takes should enhance its content, not act as a barrier.

And even if the information is dry, you can package it creatively to make it more enjoyable; entertainment value builds involvement.

Although chronology may always not suit your information, it's helpful to exploit this structure when possible. The story format is familiar and simple. Stories are easy to remember and repeat to others. And it's been said that if one can change the stories that are told within an organization, one can change the culture. Marketing research reports can actually include, through their structure and examples, elements of drama. The "unexpected" is a critical element in successful comedy or drama. Build into your communications a few dramatic elements, and your audience will more easily remember this piece, and will look forward to getting more from you in the future.

One can't know entirely how information should be packaged in

advance. But if we anticipate the communications aspect of the project, it can impact the design of the study. As an example, I've often been asked by clients to reconfigure focus group tapes into something compelling for senior management. Generally, this is not possible. The video is poor-quality, shot through glass and it's difficult to capture ideas succinctly because people tend to ramble. It should be taken into account whether senior management is the audience early on, to ensure there are adequate resources for compelling deliverables.

Great message structure

Generating enthusiasm for marketing research is an art form, and typically involves a combination of great message structure, packaging pizzazz and audience participation. This participation can take the form of attendance at focus groups or viewing ethnographic research with streaming video and allowing research users to talk with one another about what they're hearing.

Given our clients' increasingly complex environments, it's safe to assume they won't have time to wade through the confetti of observations to get to the big picture. Journalists face this situation every day and the solution is so important that journalists learn during day one on the job: "Don't bury the lead." The lead for your project could be something as simple as "Product requires open architecture." It could be more esoteric like, "Best message: Insurance is for people, not for things."

Over the years I've noticed that very senior executives, at the end of a long presentation, will often verbally recap that presentation in one sentence and then look around the room to see if others agree with this interpretation. It's an interesting phenomenon and suggests that these busy people intuitively know they won't remember everything, but they want to make sure they understand the single most important insight. We need to do this proactively. Although a certain degree of angst results when executives gloss over the details, generally speaking,

we should consider the space in an executive's mind as real estate and use it carefully.

As researchers, we are trained to be objective observers in our organizations and our methods are designed to maintain this status. Yet this doesn't mean that we view information without affect. In fact, research on cognition indicates decision-making always involves some degree of emotional valence. Hence, it's helpful to consider not only what we have learned but also how we should feel about it.

I recently developed a consumer documentary for a company summarizing a large body of research designed to change the organization's focus. In an early meeting I asked the client team, "How do you want people to feel when they see this?" I was met with a room full of blank stares, and, to be fair, it is not a question that often comes up. But this question led to a discussion about what impact we wanted this video to have to change the organization. If the work is to have any


effect at all, people must have the facts but also must feel something. It's best to anticipate and manage that in advance.

Better use of technology

One of the most important trends in research is better use of technology to engage clients with customers. Hence, we see a proliferation of community Web sites that let clients to hear from consumers themselves and observe their conversations. New technology also offers clients, for the first time, the chance to observe in-home and on-site interviews in real time from their desktops anywhere in the world. It's likely that the next generation of presentation tools will be Web-based versus PowerPoint-based. A Web-based reporting system could enable users to self-navigate densely populated reports and incorporate multiple media such as audio, video, data tables and slides, all of which could be accessed with a click of the mouse. Additionally, a Web-based report-

ing system promotes interactivity with the content by dedicating portions of the site to bulletin boards where clients can post reactions and engage in conversations regarding the results.

These are just a few ideas for improving market research communications and delivering our results. It's time for us to create more thoughtful processes for this crucial process. The mass media, from reality-TV shows to social-networking sites to 24-hour news organizations, provide intriguing ideas for this work. In the end, when we become better communicators, we're more effective business partners. The information we gather increases in value and transforms our insights today into our companies' wisdom about their customers, their products and the future. | Q

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Survey Monitor

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from 2006 to 2009. Moreover, it may have contributed to a drop in necessity ratings for the older-era appliance it has partially supplanted. People who consider a cell phone a necessity (some 49 percent of the public, including a disproportionate share of young adults) are less inclined than others to feel the same way about a landline phone. Sixty percent of adults under the age of 30 say a cell phone is a necessity, compared with 38 percent of those 65 years old or older.

An equally-dramatic generation gap opens when Americans are asked whether landline telephone service is a luxury or a necessity. More than eight-in-10 (84 percent) adults ages 65+ say a landline phone is a necessity, while only 49 percent of those under 30 agree. Younger adults are nearly four times as likely as older adults to say an in-home phone is a luxury (51 percent versus 14 percent).

“Old-tech” household appliances have fared the worst in the public’s reassessment of the line between luxury and necessity in their daily lives. Of 12 items tested, six dropped significantly in the necessity rankings from 2006 to 2009, while the other six basically held their own. All of the “old-tech” household appliances on the list dropped in their necessity ratings. For example, the proportion of people who rate a clothes dryer as a necessity fell by 17 percentage points in the past three years. There are similar declines for the home air conditioner (16 points), the dishwasher (14 points) and the television set (12 points).

A few of the “middle-aged” household appliances and services also declined. The microwave is currently viewed as a necessity by less than half the public, a 21-point drop since 2006. The proportion who rate cable and satellite television service as a necessity fell 10 percentage points since 2006.

In contrast, none of the newer information-era gadgets and services has fallen in Americans’ assessment

of what they absolutely need to have. Home computers continue to be seen as a necessity by half of the public, unchanged from three years ago. High-speed Internet access is seen as a necessity by about three-in-10 adults. Two items that came onto the consumer scene in this decade, iPods and flat-screen TVs, are still seen as a necessity by a very small share of the public, but that share hasn’t declined during the recession.

Finally, there’s the automobile – the ultimate survivor. It’s been around for nearly a century, but in good times or bad, it retains its place at the top of America’s list of everyday necessities. For more information visit <http://pewresearch.org>.

Car-buying preferences correlate with magazine readership

With automakers scheduled to introduce more than 50 new or substantially redesigned vehicle models through the end of 2010, print advertising will continue to serve as an important tool for consumer targeting, model awareness and product differentiation, according to the 2009 Power Auto Offline Media Report – Summer Edition from Westlake Village, Calif., automotive research company J.D. Power and Associates. The report measures media viewing and readership habits of new-vehicle drivers, focusing primarily on magazine readership, but also includes television viewing, radio listening, Internet usage and newspaper readership.

Despite downturns in magazine advertising and the demise of several magazines during the past year, magazine readership among new-vehicle drivers in 2009 is at its highest level since 2002. The average new-vehicle driver reads issues from 11 different magazine titles, on average, within a six-month period, up from an average of 10 magazine titles – a figure that remained static for the past five years. In light of this, advertising in print magazines can be a reliable method of establishing early

impressions of new-vehicle models among prospective buyers.

Among 27 new-vehicle segments, 30 percent of all new-vehicle launches through the end of 2010 are concentrated within the compact-basic, compact-conventional and mid-size premium-conventional segments.

“The real challenge for marketers is that consumers may be deciding between a variety of existing and newly-launched models in a particular vehicle segment,” says Jon Osborn, research director at J.D. Power and Associates. “Targeting customers early in the shopping process with messages that differentiate between competing models will be critical in capturing share-of-mind and sales close rates.”

For example, consumers considering a vehicle in the compact-basic segment, where four new models are scheduled to launch, tend to be both fuel-conscious and concerned about the environment. Drivers of compact-basic vehicles are more likely to read science, technology and outdoor enthusiast magazines such as *Discover*, *Wired*, *Outside* and *Bicycling*.

Just as individual models within a vehicle segment can differ widely, there are also important demographic and behavioral differences among the potential buyers at which these vehicles are targeted. In the compact-conventional segment, there are vehicles ranging in median price from 17,000 for the Ford Focus to 27,300 for the MINI Cooper. The median income of a Ford Focus buyer is approximately 64,000, while MINI Cooper buyers report household incomes of approximately 115,000. In this same segment is the Toyota Prius. This model is typically driven by consumers who are 57 years of age, on average – more than 10 years older than the typical MINI Cooper driver.

“Advertisers attempting to reach potential Toyota Prius buyers may find success in such publications as *Time* and *National Geographic*, whereas *Popular Mechanics* and *Prevention* are better at reaching

Ford Focus buyers. Ads placed in *Architectural Digest* and *Food and Wine Magazine* are particularly effective at targeting MINI Cooper buyers,” says Osborn. For more information visit www.jdpower.com.

Educated women lead the digital couponing charge

Saving money is very much in vogue among young consumers, but don't expect to find all cost-conscious young adults crouched over the Sunday fliers with a pair of scissors. A study from Scarborough Research, New York, shows that text messages and/or e-mail are an emerging method for households to obtain coupons, specifically among young, affluent, educated females. Users of text message and/or e-mail coupons are 14 percent more likely than the average adult to be ages 18-24; 51 percent more likely to be a college graduate or have an advanced degree; and 6 percent more likely to be female.

While not the leading medium for household coupon obtainment (the Sunday newspaper and other means such as in-store circulars and regular mail still remain the most popular), digital couponing is gaining a following among American consumers: 8.6 million (8 percent) of U.S. households currently acquire coupons via electronic methods. Text and/or e-mail coupons differ from circulars and direct mailing in that they tend to be highly relevant and include targeted recipients, most of whom have opted-in.

The top local market for text message and/or e-mail coupon users is Providence, R.I. Twelve percent of households in Providence typically obtain coupons via text message or e-mail. Washington, D.C.; Atlanta; San Diego; Austin, Texas; and Chicago, where 11 percent of households get coupons via this medium, are also among the leading markets for this activity. For more information visit www.scarborough.com.

Social networks a-twitter with movie buzz

Moviemakers, take note: Social networkers are highly engaged in grassroots movie marketing efforts. Specifically, 10 percent of social networkers said that they had posted a trailer to a social networking site. In addition, 39 percent of social networkers had reviewed a movie online, while 25 percent of non-social networkers had done the same, according to Digital Consumer Portrait: The Social Network Influence On Movie Behavior, a study from Stamford, Conn., research company InsightExpress.

In general, movie trailers are most commonly found by searching for the film's title online, with 49 percent of all respondents (social networkers and non-social networkers) reporting this behavior. Browsing general movie sites was the preferred tactic for 29 percent of respondents, while 27 percent clicked on an online ad and 25 percent stated that they like to visit the movie's Web site. In terms of age, 84 percent of viewers 18-24 years old watch previews before going to see the entire show, followed by 74 percent of viewers 25-44 years old.

Although opening weekend receives a good amount of attention from industry watchers and moviegoers alike, most people do not feel the need to see a movie within days of its release, regardless of their excitement level. In general, men are more likely than women to see a movie about which they are excited on opening weekend, with 32 percent of males and 17 percent of females reporting this behavior. An analysis of opening-weekend attendance by age shows that 42 percent of individuals 18-24 would attend, followed by 27 percent of 25-44-year-olds.

However, a look at the social networking population shows marked difference in opening-weekend enthusiasm. Thirty-one percent of social networkers agreed with the statement “It's important to me to see a movie I'm excited

about on opening weekend,” compared to only 16 percent of non-social networkers. For more information visit www.insightexpress.com.

Budget-conscious dining here to stay

It's no secret that the recession has caused U.S. consumers to cut back on spending related to dining out, but a study of food-service customers conducted by New York research company Data Development Worldwide (DDW) shows that consumers are not likely to easily or quickly return to spending more even as the economy improves. When asked whether an improving economy would change their behavior, a majority of respondents indicated they would actively continue to find ways to keep their spending in check.

When consumers do dine out, the majority finds ways to spend less during each visit. Thirty-seven percent of customers actively use coupons, and other money-saving activities include ordering less-expensive items; ordering tap water; skipping extras like appetizers, sides and desserts; and buying combo or bundled meals.

“We're finding that at least for the near-term, consumers plan to maintain their value-based behavior when dining outside the home,” says Chip Lister, managing director of DDW. “This puts a great deal of pressure on the food-service industry to develop ongoing menu offerings and pricing strategies and tactics that take this into account. It's a time when the industry needs to consider ways to be stimulative - to give their customers an opportunity to get used to an improving economy.”

Survey results may be of particular interest to those toward the top of the food-service chain. The upper tier of casual-dining establishments has taken the biggest hit, with nearly half of customers acknowledging that they've reduced the frequency of visits. For more information visit www.datadw.com.

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reach customers directly at any time for research purposes.

Community Panels are customized online communities that allow companies to interact with groups of their customers and prospects and learn from them over time through multimedia surveys and discussion forums. This format allows a company to recruit once for its panel of participants and survey the group on a regular basis. Since participants in the panels are fully networked, they can initiate conversations at will rather than waiting for brands to pose the questions. The PulsePoll application in Synovate Community Panels is designed to gauge consumer sentiment within 24 hours. For more information visit www.synovate.com/communitypanels/.

EMO Sensor gauges emotional reactions to marketing campaigns

Nuremberg, Germany, research company, The GfK Group, has debuted EMO Sensor, a tool intended to help marketers understand and manage consumers' emotional experience with brands. GfK developed EMO Sensor in collaboration with the Institute for Consumer and Behavioral Research at Saarland University in Saarbrücken, Germany. EMO Sensor aims to measure the emotions that consumers may experience when coming into contact with a brand. GfK will use the EMO Sensor primarily in the field of brand and communication research to help marketers evaluate and optimize marketing campaigns. For more information visit www.gfk.com.

Clarabridge updates its Content Mining Platform

Reston, Va., research company Clarabridge has launched version 3.3 of its Content Mining Platform (CMP) solution, designed to capture, transform

and analyze free-form customer feedback from social media, CRM systems and customer feedback systems (e-mail, surveys, chats, etc.).

CMP 3.3 updates include increased text mining and analysis speed by seven times; decreased storage requirements by 50 percent for customers who manage more than a terabyte of data; 64-bit processors; and support for enterprise security standards.

The version has also added embedded reports that can be run directly from within the Clarabridge 3.3 Navigator interface and do not require use of a third-party business intelligence application. The Navigator also includes new ways to classify customer feedback using a combination of linguistic, Boolean and statistical approaches.

Other enhancements include a new sentiment engine designed to improve the accuracy of sentiment calculation and scoring; advanced statistical functionality to allow for predictive analytics and other advanced analytics; and expanded support for enterprise business intelligence and data warehouse platforms. For more information visit www.clarabridge.com.

United Sample partners to launch two new panels

United Sample, an Encino, Calif., research company, and Clear Sky Media, Toronto, have partnered to launch a survey platform for RedFlagDeals.com, a comparison-shopping Web site. United Sample will serve as the exclusive provider of a private-label panel Web site for Canadians (Surveys.RedFlagDeals.com). Participants registered with RedFlagDeals.com can sign up to take surveys in exchange for cash rewards. United Sample's platform will pay the rewards in Canadian dollars through PayPal. United Sample will also manage all facets of the RedFlagDeals.com survey community, as well as its online panel.

Separately, United Sample and eSPIN, a Chicago entertainment

network for teens and young adults, have launched www.Surveys4Teens.com, an online community where teens can earn rewards for sharing their thoughts. United Sample will manage the Surveys4Teens community as well as its online panel. For more information visit www.unitedsample.com.

Software aims to analyze with point-and-click technology

The Analytical Group Inc., a Scottsdale, Ariz., research company, has released WinCross Executive, a tabulation and reporting software offering intended to analyze data with a point-and-click solution. WinCross Executive is designed to generate crosstabs; publish reports and graphs directly to PowerPoint, Excel and Word; operate without programming or special commands; import other data types, including Excel, SPSS, delimited and fixed ASCII files; be compatible with other TAG products, including WinCross, WinQuery and QueryWeb; offer comprehensive statistical and significance testing; and import WinCross table and banner specifications for data mining and exploration. A free 30-day trial version is available. For more information visit www.wincross-executive.com.

Briefly

Chicago research company SPSS Inc. has released PASW Direct Marketing, a tool designed to automate the analysis of customers, prospects and campaigns and facilitate more effective campaigns. Its interface allows marketers to perform analysis with six analytical procedures: recency, frequency and monetary analysis, cluster analysis and prospect profiling. PASW Direct Marketing also includes postal code analysis, propensity scoring and control package testing. For more information visit www.spss.com.

The ARSgroup, an Evansville, Ill., research company, has introduced its ars.touchpoint test suite, a copy testing solution intended to provide the precision of offline testing with online convenience. The ars.touchpoint test suite relies on Internet bandwidth and growing consumer familiarity with rich digital media and enables the online collection of the ARS Persuasion metric at a level comparable to that of traditional methods. For more information visit www.arsgroup.com.

New Hope, Pa., research company Roger Green and Associates has debuted its DPS Tracker, an ATU/tracking system based on its Dynamic Practice Simulation methodology. The Tracker is intended for pharmaceutical, biotechnology and medical device companies. The yearlong program aims to combine a traditional ATU/tracking study with positioning and driver analysis. For more information visit www.rogergreen.com.

Columbia, Md., research company Arbitron Inc. has launched a combined panel for television and radio audience measurement in Canada using its Portable People Meter technology. In April 2008, BBM Canada chose the Arbitron and TNS Media Research joint solution to support this multimedia measurement initiative. For more information visit www.arbitron.com.

NDS, a Middlesex, U.K., technology solutions company, and TNS Media Research, London, have enhanced their joint TV audience measurement offering to include the RPDi solution, designed to identify individual viewers in homes who have agreed to participate in a measurement panel. For more information visit www.tnsglobal.com/mediaresearch.

London research firm TNS Magasin has combined its mobile brain-scanning technology with its eye-tracking services to track shoppers' emotional and cognitive responses to what they see in a store. TNS Magasin has been using an electroencephalography system from Chicago neuroscience firm EmSense. The firm is also combining its software with German usability researcher Eye Square's Web-based software. For more information visit www.tns-magasin.com.

Los Angeles research company Interpret LLC has introduced MobileTrax, a tool developed to analyze consumer behavior surrounding purchase and satisfaction of mobile handsets and devices. MobileTrax is designed to provide handset and PC vendors, technology companies and mobile carriers with understanding of pre- and post-launch consumer awareness and buzz surrounding devices, as well as post-purchase satisfac-

tion and usage models. For more information visit www.interpretllc.com.

Redwood Shores, Calif., advertising agency Rocket Fuel Inc. has launched its hybrid ad network that combines information from social, behavioral, contextual, search and other data sources to understand consumer interest and intent. Using its Progressive Optimization technique, Rocket Fuel uses automated testing and user-level targeting to adjust campaigns around the clock in hopes of boosting campaign performance within hours instead of the weeks or months it would take to analyze the data manually. For more information visit www.rocketfuelinc.com.

20|20 Research Inc., Nashville, Tenn., has debuted QualBoard 3.0, the latest iteration of its online qualitative research platform, which aims to improve bulletin board focus group software. Enhancements include customizable question types (text-based, multiple-choice, multiple-answer and media response); segmentation across an unlimited number of dimensions; unlimited content tagging capacity; central dashboard controls for moderators, clients and participants; and advanced media handling. For more information visit www.2020research.com.



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The National Restaurant Association, Washington, D.C., and Cincinnati research company **Loyalty 360** have formed an alliance to conduct research to analyze loyalty marketing programs in the restaurant industry. Loyalty 360 will also assist the National Restaurant Association in developing strategies for its members for social and emerging media as additional methods by which to drive loyalty and engagement.

New York researcher **The Nielsen Company** and Chicago research company **Information Resources Inc.** (IRI) have formed a U.S. production joint venture to recruit, maintain and process data from a common set of households to support the Nielsen Homescan and IRI Consumer Network panels, which will continue to be operated by their respective companies. The pool of households will be owned by the joint venture, but the techniques used for projecting, analyzing and delivering insights will remain proprietary to each company.

Association/organization news

The Pharmaceutical Business Intelligence Research Group, Philadelphia, has appointed **Henry Gazay** of Miami research company Medimix International to its 2009-2010 advisory board.

The Advertising Research Foundation (ARF), New York, has appointed **Steve Coffey** of The NPD Group as co-chair of the ARF's Online Quality Research Council.

Awards/rankings

Chicago research software company **SPSS Inc.** has received a 2009 Technology ROI Award from **Nucleus Research**, Boston, for SPSS's Predictive Analytics Software's contribution to Navy Federal Credit Union, Vienna, Va. Navy Federal used the software to improve member satisfaction,

corporate expansion and member lifetime value.

ESOMAR, Amsterdam, the Netherlands, honored six researchers with awards at ESOMAR's annual congress in Montreux, Switzerland, in September 2009. **Kim Dedeker** of Kantar received the ESOMAR Excellence Award for Standards of Performance in Market, Opinion and Social Research - The John Downham Award. **Annelies Verhaeghe** of InSites Consulting received the Young Researcher of the Year Award. **Ed Keller** of The Keller Fay Group and **Barak Libai** of Tel Aviv University were the recipients of the ESOMAR Excellence Award for Best Paper of the Year 2009. The Best Overall Paper - the Fernanda Monti Award - was given to **Annelies Verhaeghe** and **Micheal Friedman** of InSites Consulting. The Best Case History Award was given to **Keith Bailey** of Nokia and **Andy Dexter**, **Leanne Tomasevic** and **Adam Chmielowski** of Truth. **Namita Mediratta** of Unilever Indonesia and **Raghavan Srinivasan** and **Astiti Suhirman** of TNS Indonesia received the award for the Best Methodological Paper.

Research companies **Infosur Inc.**, Atlanta, and **Second To None**, Ann Arbor, Mich., have been named to *Inc.* magazine's Inc. 5000 list of the nation's fastest-growing private companies for the second and third years in a row, respectively.

GfK Custom Research North America, New York, has won a 2009 Silver Beacon award for Crystal, its global segmentation study for energy client BP.

New accounts/projects

BuzzBack Market Research, New York, has selected **iRise**, an El Segundo, Calif., business software company, to serve as its platform for bringing new offerings to market. BuzzBack will

use iRise's offerings to create visualizations of new Web-based product ideas early in the definition and development lifecycle and to provide a platform for testing product ideas directly with research staff and prospective market research customers.

Columbia, Md., research company **Arbitron Inc.** has signed an agreement with **BroadSign International**, a Montreal signage software company, to deliver a proof-of-play advertising audit service using its Portable People Meter (PPM) technology. Arbitron will use PPM to conduct a series of annual audits capturing when encoded audio and video advertising content is displayed on networked digital screens in 50 random BroadSign-run locations across the U.S.

Separately, **Lakes Media LLC**, a South Boston, Va., broadcast group, has signed an agreement with Arbitron to have Arbitron conduct a custom survey area report for fall 2009 in Northern N.C.-Southside Va.

Finally, Arbitron has formed a task force of radio and advertising industry leaders to develop an ongoing measure of "affinity" that is intended to reflect the advertising value of the relationship listeners have with their stations. The mission is to design a relevant, timely and accessible metric that captures audience involvement and has an impact on radio planning and buying.

Dallas research company **e-Rewards Inc.** has selected Westport, Conn., research company **RelevantView's** digital fingerprinting technology RelevantID to improve respondent validation in Veracity360, e-Rewards' quality management system.

Additionally, e-Rewards has partnered with Mexico City airline **AeroMexico** to expand its business-to-business and affluent consumer panels. Members of AeroMexico's Club Premier rewards program will have

the opportunity to enroll in e-Rewards opinion panels and earn Club Premier points in exchange for their participation.

Stockholm, Sweden, research company **Cint** has increased the size of its Panel Exchange from 30,000 to 200,000 as a result of four companies joining the Panel Exchange.

New York researcher **The Nielsen Company** and New York broadcasting company **Time Warner** have entered into a multi-year agreement to combine the Nielsen services subscribed to by all Time Warner businesses in one contract, including Nielsen's television, online and mobile measurement services, as well as research on advertising segmentation, targeting and consumer engagement. The agreement provides Nielsen services to Time Warner's broadcast, cable, syndication business units and affiliates.

Darmstadt, Germany, data services company **Versatel AG** has selected Chicago research software company **SPSS Inc.**'s Predictive Analytics Software in an effort to optimize the management of its marketing campaigns.

New companies/new divisions/relocations/expansions

Quick Test/Heakin Research Inc., Jupiter, Fla., has opened a facility at the Westfield Topanga Mall in Canoga Park, Calif. The facility will be called **QuickView-Topanga**.

Ci Research, Wilmslow, U.K., has formed a new retail division. The team of four includes Gareth Hodgson, Richard Walker, Katy Leng and Amy Wilde.

London research company **Verve** has opened an office in Sydney, Australia. Andrew Cooper will lead the operation, along with Lamia Lee and Charlotte Brady.

Ipsos Public Affairs, a New

York division of Paris research company Ipsos, has launched its Hispanic Research Center, a resource dedicated to providing market research and insight into the lives of Hispanics in the U.S. It is also designed to provide Ipsos' clients the opportunity to increase the visibility of publicly-released surveys and polls conducted among Hispanics.

Research company earnings/financial news

Survey Sampling International (SSI), Shelton, Conn., announced that its charitable outreach programs reached nearly 1.6 million. Since 2001, SSI has supported causes to aid those in need on behalf of its 6 million OpinionWorld and SurveySpot panelists.

Cello Group, London, announced its interim results for the six months ended June 30, 2009. Operating income was £30.2 million, a 10.9 percent decrease from the same period in 2008. Headline operating profit was £2.5 million (£4.4 million in 2008). The company also reported operating loss of £3.4 million, compared to a profit of £2.9 million in 2008.

The GfK Group, Nuremberg, Germany, reported results for the first six months of 2009. The company increased sales by 10.6 percent over the first quarter to EUR 292.8 million. Overall, sales amounted to EUR 557.5 million, down 5.5 percent on the prior year. In organic terms, sales were down by 8.5 percent. Acquisitions contributed a total of 2.2 percent to sales growth. Currency effects increased sales by 0.8 percent. Adjusted operating income increased to EUR 36.8 million, compared with EUR 14.8 million in the first quarter of the year. Income totaled EUR 51.6 million, compared with EUR 66.8 million in the same period of the prior year.

Ipsos, Paris, reported earnings for the first half of 2009. Revenues came to EUR 447.8 million, down

3.2 percent compared with the same period in 2008. This was subject to a negative currency effect of 0.8 percent. Gross margin declined by 1.9 percent. Operating margin before non-recurring items was down 110 basis points compared with the first half of 2008, due to operating expenses remaining stable at EUR 243.4 million (up 0.4 percent compared with the first half of 2008). Other operating income and expenses came to EUR 7.1 million compared with EUR 0.4 million in the year-earlier period.

Toluna, Dallas, reported results for the first half of 2009, with total revenue up 67 percent to £13.7 million. Revenue in Europe was up 50 percent to £8.5 million, with France and the U.K. making notable contributions to the performance. Sales doubled to £5 million in North America, which included the effects of the acquisition of Common Knowledge in June 2008. In Asia-Pacific, revenue climbed from £0.1 million to £0.3 million. Operating profits were up 21 percent over last year to £1.6 million. The company also acquired Greenfield Online for 40 million, and the transaction is anticipated to enhance Toluna's earnings per share for the year ending December 31, 2010.

In-Touch Survey Systems Ltd., Ottawa, Canada, announced that revenue grew by 8 percent to 1.4 million for the second quarter of 2009. Net loss was 89,267, similar to a net loss of 86,263 in second-quarter 2008.

IPerceptions Inc., Montreal, reported financial results for the second quarter ended June 30, 2009. Revenue of 1.1 million was comparable to the same period in 2008. Net loss and comprehensive loss for the second quarter of 2009 was 981,600, compared to 661,083 for the prior-year period. The basic and diluted loss per share was 0.03, compared to 0.02 for the same period in 2008.

questions you should ask when ...

selecting a panel provider

Recruitment

There are two widely-used methodologies used to recruit panel members into an online panel. Open-source recruitment allows for anyone with access to the Internet to enroll into a panel. Closed, or by-invitation-only, recruitment is a method of inviting only pre-validated individuals or individuals who possess known characteristics to enroll into a market research panel.

Opting in

The opt-in process might indicate the respondents' relationship with the panel provider. Double opt-in enrollment describes the process by which a check is made to confirm that the person joining the panel wishes to be a member and understands what to expect.

Sources

Is the panel actively managed or database-driven? Actively-managed panels consist of panel members who voluntarily opt in to participate in a panel and receive invitations for online research surveys. Database contact lists consist of large-scale repositories of e-mail addresses obtained from various sources. Little to no prior agreement and/or consent to receive market research survey invitations has been given by individuals on these lists. Actively-managed panels have been shown to produce higher response rates and data quality.

Compensation

How are panel members compensated? What are people told during recruitment? How does this vary by length of interview, respondent characteristics, etc? The type of rewards and proposition could influence the type of people who agree to answer a questionnaire or join a specific panel and can therefore influence sample quality. Panel providers utilize two primary methods for incentive fulfillment: guaranteed cash/reward incentive or sweepstakes prize drawing. Cash/reward incentives are awarded upon survey completion. The sweepstakes incentive method awards respondents by entering their name into a prize drawing for completing a survey. Prize drawings are done periodically and the number of eligible contestants varies. Guaranteed cash/reward incentives have been proven to yield higher response rates.

Profiling

How often is profile information updated? What profile data is kept on panel members? How often is this data updated? Extended and up-to-date profile data increases the effectiveness of low-incidence sampling and reduces pre-screening of panelists. If you are seeking to reach a low-incidence or hard-to-reach group, a panel provider with extensive targeting is better equipped to fulfill your request.

Contact frequency

How often are members contacted or invited to participate in surveys? Panel providers that frequently blast their panel members with survey invitations risk falling into the category of junk mail in the minds of individuals. Moreover, panel providers that allow panel members to participate in multiple surveys within a short period of time can increase the number of hyperactive and professional respondents that complete surveys. Seek a sample provider that limits the number of times a panel member is invited to participate in surveys over a given period of time.

Quality control

What guarantees are there to guard against bad data (i.e., respondent cheating or not concentrating)? Do you have an identity confirmation procedure? Do you have procedures to detect fraudulent respondents at the time of registration? To ensure the quality and reliability of the data, choose a panel provider that employs a quality management system. Quality management systems vary by panel provider but consist of tools and processes to identify and eliminate duplicate members and undesirable respondents from their panel.

Special thanks to e-Rewards Inc., Dallas, and ESOMAR, Amsterdam, The Netherlands, for providing input on the questions.

2009

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 95, 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.

AbsolutData Research and Analytics

Alameda, CA
Ph. 510-748-9922
info@absolutdata.net
www.absolutdata.com
Nikhil Madan
Panel Titles:
India Speaks Online Panel
Type: Online

ACNielsen

Schaumburg, IL
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

**Affordable Samples, Inc.**

Old Greenwich, CT
Ph. 800-784-8016 or 203-637-8563
sales@affordablesamples.com
www.affordablesamples.com
James Sotzing, President
Panel Titles:
Affordable Samples Online Business Panel
Size: 900,000 Type: Online
Affordable Samples Online Consumer Panel
Size: 2,000,000 Type: Online

The OTHER, better value sampling company in Connecticut, founded in 1991, providing representative online consumer (2 million) and business (900,000) 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. 77)

all global

New York, NY
Ph. 212-271-1200
clientservices@allglobal.com
www.allglobal.com
Tony Burke, Director
Panel Titles:
all global Online
Type: Online
all global Palliative Care Panel
Size: 18,000 Type: Online

**Amplitude Research, Inc.**

Boca Raton, FL
Ph. 877-225-7950
sales@amplitudersearch.net
www.amplitudersearch.com
Stephen S. Birnkrant, CEO
Proprietary Panel Mgmt.: Yes
Panel Titles:
Panelspeak Business Panel
Size: 50,000+ Type: Online
Panelspeak Technology Panel
Size: 60,000+ Type: Online

Amplitude Research Inc., headquartered in Boca Raton, Fla., specializes in consumer, B2B and IT market research surveys. We can reach sales and marketing professionals; small business owners; middle and executive management; network administrators; software developers; IT professionals; and

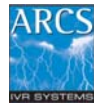
many other difficult to reach B2B and IT selects. All surveys are programmed by our experienced staff and hosted on our proprietary survey platform. This allows us to maintain high completion rates, provide data cleaning and monitor respondent completion times through the use of timers.

AMR Interactive

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

Anderson Analytics, LLC

Stamford, CT
Ph. 888-891-3115 or 203-912-7175
inquiries@andersonanalytics.com
www.andersonanalytics.com
Tom Anderson, Managing Partner
Proprietary Panel Mgmt.: Yes
Panel Titles:
GenX2Z.com
Size: 10,000 Type: Online

**ARCS®**

Fort Washington, PA
Ph. 800-336-7674 or 215-653-7100
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. Built on the .NET 3.5 Framework and SQL Server Platform, ARCS systems feature 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. 17)

**Authentic Response**

New York, NY
Ph. 1-888-AR-PANEL
info@authenticresponse.com
www.authenticresponse.com
Jeff Mattes, Vice President
Proprietary Panel Mgmt.: Yes
Panel Titles:
My View Global B2B Panel
Size: 2,000,000+ Type: Online
My View International Consumer
Size: 1,000,000+ Type: Online
My View U.S. Consumer Panel
Size: 3,000,000+ Type: Online

Since 1998, Authentic Response has led the market research industry with best of breed solutions for global online sample, including our Authentic Recruitment panelist sourcing technique, patented double opt-in permission standards and our Authentic Validation process that ensures legitimate survey responses of the very highest quality. With industry-leading reach to consumers, business decision makers and many other heavily profiled audiences, it's no wonder that hundreds of market research firms look to Authentic Response for their global online sample needs.

AutoPacific, Inc.

Tustin, CA
Ph. 714-838-4234
dan.hal@autopacific.com
www.autopacific.com
Panel Titles:
AutoPacific VehicleVoice Panel
Size: 10,000 Type: Online

B&N PanelWizard BV

DA Groningen
Netherlands
Ph. 31-50-3657-672
info@panelwizard.com
www.panelwizard.com
Proprietary Panel Mgmt.: Yes

Borderless Access Panels

Bangalore
India
Ph. 91-80-41785814 or 866-614-8047 toll-free
rpf@borderlessaccess.com
www.borderlessaccess.com
Dushyant Gupta
Proprietary Panel Mgmt.: Yes
Panel Titles:
Borderless Access Panels - Brazil - Consumer & B2B
Size: 75,000 Type: Online
Borderless Access Panels - China - Consumer & B2B
Size: 75,000 Type: Online
Borderless Access Panels - India - Consumer & B2B
Size: 250,000 Type: Online
Borderless Access Panels - Russia - Consumer & B2B
Size: 75,000 Type: Online

BuzzBack Market Research

New York, NY
Ph. 646-519-8010
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.
Chicago, IL
Ph. 312-828-9200
www.cresearch.com
Robbin Jaklin, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
KidzEyes.com
Size: 16,000 Type: Online
LatinoEyes.com
Size: 5,300 Type: Online
TeensEyes.com
Size: 16,700 Type: Online

C&R Research, a full-service market research company specializes 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 customized solutions and targeted, actionable results. Its specialized 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. C&R also offers a syndicated product, YouthBeat®, which provides a comprehensive, in-depth view of today's youth based on 8,000 monthly interviews of kids, tweens and teens ages 6-18. And ParentSpeak™, an online parent community, provides a platform for parents to discuss their experiences while participating in various research projects.
(See advertisement on p. 63)

Campos Market Research, Inc.

D/B/A Campos Inc
Pittsburgh, PA
Ph. 412-471-8484 x309
info@campos.com
www.campos.com
Proprietary Panel Mgmt.: Yes

Canadian Viewpoint, Inc.

Richmond Hill, ON
Canada
Ph. 905-770-1770 or 888-770-1770
info@canview.com
www.canview.com
Panel Titles:
Canadian Viewpoint Consumer Panel
Size: 260,000+ Type: Online
Canadian Viewpoint Physician Panel
Size: 11,000 Type: Telephone, Online

**CATALYST MR**

Oakland, CA
Ph. 800-819-3130
info@catalystmr.com
www.catalystmr.com
Adam Berman
Proprietary Panel Mgmt.: Yes
Panel Titles:
U.S. / Intl. Consumer, B2B, health care, & Technology
Size: 3,000,000+ Type: Online

CatalystMR delivers industry renowned panels made up of Consumers, B2B, health care professionals, IT decision makers and teens from over 53 countries. We deliver quality respondents while providing tremendous cost savings, increased sample quality and study projectability. We bring you peace of mind and an ROI that makes utilizing our services truly rewarding. Ask us about our 8-pronged approach to quality control. CatalystMR keeps the bots, cheaters, racers and lethargic out of your results because it is our business to care about the quality of your data.

ChildResearch.com

Branford, CT
Ph. 203-483-4301
steve.burch@childresearch.com
www.childresearch.com
Steve Burch, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Childresearch.com Panel
Type: Online

Ciao GmbH

Munich
Germany
Ph. 49-89-2555-1600
germany@ciao-group.com
www.consumer-access.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Ciao's Car Panel
Ciao's European Access Panel
Size: 800,000
Ciao's Health Panel

Cint U.S.A

Atlanta, GA
Ph. 404-946-1821
contact-U.S.A@cint.com
www.cint.com/cpx
Proprietary Panel Mgmt.: Yes

Clear Seas Research

Troy, MI
Ph. 248-786-1683 or 248-786-1619
info@clearseasresearch.com
www.clearseasresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Building Materials Talk
Size: 3,000+ Type: Online

Clear Voice Research, LLC

Denver, CO
Ph. 303-534-3333
sales@clearvoicesurveys.com
www.clearvoicesurveys.com
Panel Titles:
Clear Voice Surveys
Size: 500,000 Type: Online

ClickIQ

Bloomington, MN
Ph. 952-224-0810
sales@clickiqinc.com
www.clickiqinc.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
ClickIQ Consumer Panel
Size: 675,000 Type: Online

comScore Inc.

Toronto, ON
Canada
Ph. 416-642-1002
sales@surveysite.com
www.comscore.com/Products_Services/Custom_Research
Proprietary Panel Mgmt.: Yes
Panel Titles:
Opinion Square
Permission Research
Relevant Knowledge

Consumerscan International

Integra
Vancouver, BC
Canada
Ph. 604-731-2600
info@consumerscan.ca
www.consumerscan.ca
Panel Titles:
ConsumerScan
Size: 70,000

Cooper Roberts Research, Inc.

San Francisco, CA
Ph. 415-442-5890
info@cooper-roberts.com
www.cooper-roberts.com
Proprietary Panel Mgmt.: Yes

CRC Research

Vancouver, BC
Canada
Ph. 604-714-5900 or 866-455-9311
Vancouver@crcresearch.com
www.crcresearch.com
Jessica Gibson
Proprietary Panel Mgmt.: Yes
Panel Titles:
Consumer Research Panel, The
Size: 90,000 Type: Online
PharmaField Research
Size: 125,000 Type: Online

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

Creative Marketing Research Ltd.

Ipswich, UK
 United Kingdom
 Ph. 44-0-1473-832211
 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

Lincoln, NE
 Ph. 402-441-3131
 kyle@crossfinancial.com
 www.crossfinancial.com
 Kyle Hershberger, Vice President
 Proprietary Panel Mgmt.: Yes

Cross-Tab Marketing Services (Br.)

Mumbai
 India
 Ph. 91-22-28443031 or 91-22-40682822
 sales@cross-tab.com
 www.cross-tab.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Cross-Tab Marketing Services- India B2B Panel
 Size: 100,000 Type: Online
 Cross-Tab Marketing Services- India Consumer Panel
 Size: 150,000 Type: Online

CyberEdge

Oakland, CA
 Ph. 510-419-0800
 research@cyberedge.com
 www.cyberedge.com
 Panel Titles:
 VizSim/VR Vendors Panel

**Data Development Worldwide**

New York, NY
 Ph. 212-633-1100
 ciister@datadw.com
 www.datadw.com
 Panel Titles:
 Know More™ Internet Panel
 Size: 6,000,000 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.

Atlantic Beach, FL
 Ph. 410-414-5718
 robin@datazoneresearch.com
 www.datazoneresearch.com
 Rebecca Hart
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 The Vet Zone.com
 Size: 4000+ Type: Online

Datatelligence Online

Ormond Beach, FL
 Ph. 386-677-5644
 sales@datatelligence.com
 www.datatelligence.com
 Jeffrey Fiesta
 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**

Fresno, CA
 Ph. 800-923-5523
 info@decipherinc.com
 www.decipherinc.com
 Kristin Luck
 Proprietary Panel Mgmt.: Yes

Decipher offers complete custom online panel solutions customized to your objectives, including panel design, recruitment and list maintenance, as well as panel driven surveys and data tabulation. 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.

**Decision Analyst, Inc.**

Arlington, TX
 Ph. 817-640-6166 or 800-262-5974
 jthomas@decisionanalyst.com
 www.decisionanalyst.com
 Jerry W. Thomas, President/CEO
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 American Consumer Opinion®
 Size: 7,000,000 Type: Online
 Contractor Advisory Board
 Size: 20,000 Type: Online
 Executive Advisory Board
 Size: 100,000 Type: Online
 Medical Advisory Board
 Size: 35,000 Type: Online
 Physician's Advisory Council
 Size: 25,000 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 p. 61)

Diagnostics Plus, Inc.

State College, PA
 Ph. 814-238-7936 or 814-234-2344
 jfong@diagnosticsplus.com
 www.diagnosticsplus.com
 Panel Titles:
 Diagnostics Plus health care Panels
 Size: 7,000 Type: Telephone, Online

Dialego AG Market Research Online

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

Digital Research, Inc.

Kennebunk, ME
 Ph. 207-985-7660
 jane.mount@digitalresearch.com
 www.digitalresearch.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 DRI Consumer Panel
 Size: 197,234 Type: Online

**DMS Insights**

Dallas, TX
 Ph. 800-409-6262 or 214-222-6173
 info@dms-insights.com
 www.dms-insights.com
 Panel Titles:
 Opinion Place Panel
 Size: 1,500,000 Type: Online
 Survey Spree
 Size: 600,000 Type: Online
 Tu Opinion Latina
 Size: 50,000+ Type: Online

Founded in 1995, DMS Insights leverages its full-service heritage to provide a level of research knowledge and expertise unseen with other online sample providers. Our pioneering work in creating the innovative "river sampling" methodology resulted in the development of Opinion Place, the online industry's first and largest portal for reliable survey respondents. Opinion Place is the right choice when quality matters. SurveySpree, a general population online panel of more than 600,000 households, provides precision targeting capabilities. Other specialty panels we offer include: Hispanic (Tu Opinion Latina), B2B and Health Conditions.
 (See advertisement on p. 79)

DoctorDirectory.com, Inc.

Asheville, NC
 Ph. 828-255-0012 x118 or 888-796-4491 x118
 sales@doctordirectory.com
 www.doctordirectory.com
 Hank Parish, VP Sales
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 DoctorDirectory Physician Panel
 Size: 650,000 Type: Mail, Online

Understanding Your World.



DMS Insights is an innovative leader in online research, delivering executional excellence and empowering our partners to achieve clarity into marketplace behavior. Our product suite offers the ultimate solution for trusted online research.



Opinion Place

The Original River Sample

Our original, unmatched River is the only online method capable of generating an "RDD for the Web" sample

Invented by DMS more than 10 years ago, Opinion Place™ provides the freshest online sample from the broadest reach of people.



Opinion Place

The Original Validated Panel

Targeted Online Sample

Finding and engaging highly targeted groups for online research has never been easier!

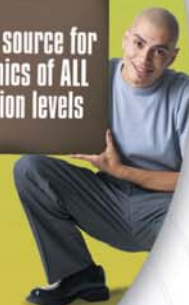
Representing more than 1.5 million individuals from over 700,000 households with profiling regarding technology, leisure, shopping, business, health conditions, and more.



La Voz del consumidor Hispano

Representing more than 50,000 Hispanic households of all acculturation levels, from Spanish dominant to fully acculturated.

Your online source for U.S. Hispanics of ALL acculturation levels



For more information:
call **800.409.6262**
email info@dmsinsights.com
or visit www.dmsinsights.com

The Dohring Company

Glendale, CA
 Ph. 800-242-8022
 sales@dohring.com
 www.dohring.com
 Thyra Lees-Smith, VP Business Development
 Panel Titles:
 Market Surveys: B2B
 Size: 140,000 Type: Online
 Market Surveys: Consumer
 Size: 1,900,000 Type: Online
 Market Surveys: IT
 Size: 65,000 Type: Online

A leader in market research since 1986, the Dohring Company offers a full suite of top-quality end-to-end online market research fielding services, including online panels consumer; IT; B2B - (targeted, micro-profiled, cleaned and managed with care); programming and hosting and data processing. Experience the difference of 100% U.S.-based project support, 24/7 customer commitment, highly-experienced team of professional market researchers, quick launch times, no project minimums or additional fees. Capture the hard to reach with Dohring!

EcoUnit LLC

Los Altos, CA
 Ph. 650-283-4774
 kent@ecounit.com
 www.ecounit.com
 Kent Ragen, CEO
 Panel Titles:
 EcoUnit Eco-Aware Consumer Panel
 Size: 10,000+ Type: Online

Embrain Co., Ltd.

Seoul
 South Korea
 Ph. 82-2-3406-3851
 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

Cincinnati, OH
 Ph. 513-321-9955
 sales@emisurveys.com
 www.emisurveys.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Online Global B2B
 Size: 3,000,000 Type: Online
 Online Global B2C
 Size: 30,000,000 Type: Online
 Online Global health care
 Size: 7,000,000 Type: Online

ePanel Co., Ltd.

Beijing
 China
 Ph. 9610-6225-5703 x8037 or 1590-1362-057
 wendy@epanel.cn
 www.epanel.cn
 Panel Titles:
 China Consumers
 Size: 385,562 Type: Mail
 China Consumers
 Size: 538,988 Type: Telephone
 Chinese Consumers
 Size: 1,094,595 Type: Online

EPOCRATES QUICKRECRUIT®

Your Source for Online Healthcare Recruitment

Epocrates, Inc.

East Windsor, NJ
 Ph. 609-632-1070
 marketresearchservices@epocrates.com
 www.epocrates.com/services/marketresearch
 Matt Campion, EVP, Market Research
 Panel Titles:
 Epocrates Honors® Dentist panel
 Size: 15,500 Type: Online
 Epocrates Honors® Dietician/Nutritionist Panel
 Size: 1,500 Type: Online
 Epocrates Honors® Nurse Panel
 Size: 145,000 Type: Online
 Epocrates Honors® Nurse Practitioner Panel
 Size: 44,500 Type: Online
 Epocrates Honors® Optometrist Panel
 Size: 6,000 Type: Online
 Epocrates Honors® Pharmacist Panel
 Size: 50,000 Type: Online
 Epocrates Honors® Physician Assistant Panel
 Size: 27,000 Type: Online
 Epocrates Honors® Physician Panel
 Size: 156,000 Type: Online
 Epocrates Honors® Podiatrist Panel
 Size: 3,000 Type: Online
 Epocrates Honors® Veterinarian Panel
 Size: 1,000 Type: Online

Epocrates QuickRecruit® services offers the largest opted-in, verified physician panel in the industry with over 156,000 U.S.-based physicians, as well as 473,000 allied health care professionals. Epocrates also offers access to over 175,000 verified physicians and 20,000 pharmacists in the G5 and other emerging markets, your one-stop-shop for all your market research health care recruitment needs. Epocrates has worked with over 150 market research firms bringing the experience and reliability you need to ensure a successful recruitment project.
 (See advertisement on p. 41)

E-Poll Market Research

Encino, CA
 Ph. 877-MY-EPOLL or 818-995-4960
 client@epoll.com
 www.epollresearch.com
 Mark Crary, Director of Marketing
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 E-Poll Consumer Panel
 Size: 250,000 Type: Online

e-research-global.com

Honolulu, HI
 Ph. 808-377-9746
 drjohn@e-research-global.com
 www.e-research-global.com
 Thomas E. Johnson, Ph.D.
 Panel Titles:
 e-Research-Global.com Panel
 Size: 160,000 Type: Online



e-Rewards MARKET RESEARCH

e-Rewards Market Research
 Dallas, TX
 Ph. 888-203-6245
 ask@e-rewards.com
 www.e-rewardsresearch.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 e-Rewards Automotive Online Panel
 Type: Online
 e-Rewards Canada Online Panels
 Type: Online
 e-Rewards France Online Panel
 Type: Online
 e-Rewards Germany Online Panels
 Type: Online
 e-Rewards Mexico Online Panels
 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 850 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 350 professionals in Dallas, London, Los Angeles, New York, San Francisco, Chicago, Seattle, Paris and Frankfurt.
 (See advertisement on p. 47)

eSample Solutions

(U.S. & Canada Headquarters)
 Saskatoon, SK
 Canada
 Ph. 306-979-0984
 info@esamplesolutions.com
 www.esamplesolutions.com
 Brad Hogan, Online Panel Consultant
 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 health care Patient Panel (U.S./Canada)
 Size: 500,000+ Type: Telephone, Online
 eSample Hispanics
 Size: 100,000+ Type: Telephone, Online
 eSample International Panel (200+ Countries)
 Size: 7,000,000+ Type: Mail, Telephone, Online
 eSample IT Professionals
 Size: 100,000+ Type: Telephone, 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



Esearch.com, Inc.
 Rolling Hills, CA
 Ph. 310-265-4608
 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 p. 81)

FGI Research
 Chapel Hill, NC
 Ph. 919-929-7759
 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
 Fort Washington, PA
 Ph. 215-367-4000
 william@focusfwd.com
 www.focusfwd.com
 Panel Titles:
 Focus Forward Online Panel
 Size: 500,000 Type: Online

Ready for the next generation in panel? Through our unique building process, Focus Forward Online provides high-quality, targeted U.S.-only panelists for B2B, medical and general market online research. Straight surveys are always available with fast turn-around. But if you need to build a community, or dive into robust responses on a bulletin board, or populate an energetic online focus group or test a product - that is where our panel-building process equals premium results. Diverse - highly engaged - responsive. Focus Forward Online.

Focus World International, Inc.
 Holmdel, NJ
 Ph. 732-946-0100
 gary@focusworldint.com
 www.focusworldinternational.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Focus World B-2-B Medical Panels
 Size: 2,882,240 Type: Telephone, Online
 Focus World Consumers Nationwide Panel
 Size: 5,765,087 Type: Telephone, Online
 Focus World Ethnic Panel
 Size: 834,201 Type: Telephone, Online

G.L.A. Int'l Marketing and Communication Cnstrng
 Tokyo
 Japan
 Ph. 81-50-5534-3915
 inquiry@GlobalLinkAssociates.com
 http://EN.GloballinkAssociates.com
 Shino Fukuyama, Managing Director
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 G.L.A. Japanese House Hold Photo Reporting Panel
 Size: 100 Type: Mail, Telephone, Online

Gallup Panel
 Omaha, NE
 Ph. 402-938-6539
 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



GENESYS Sampling Systems
 Fort Washington, PA
 Ph. 800-336-7674 or 215-653-7100
 info@m-s-g.com
 www.genesys-sampling.com
 Alan Lambert, 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. 17)

GfK Custom Research North America
 New York, NY
 Ph. 212-240-5300
 info@gfkamerica.com
 www.gfkamerica.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 GfK Global Online Access Panel
 Size: 1,500,000+ Type: Online



GMI (Global Market Insite, Inc.)
 Bellevue, WA
 Ph. 866-5-ASK GMI or 206-315-9300
 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 24x7x365 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 p. 49)

ONLINESAMPLE. ONLINEPANELS. ONLINERESEARCH.



ESEARCH.COM
 esearch@esearch.com



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

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

**Greenfield Online/Toluna**

Wilton, CT
Ph. 203-834-8585
solutions@greenfield.com
www.greenfield-ciaosurveys.com
Keith Price
Proprietary Panel Mgmt.: Yes
Panel Titles:
Greenfield Online/Toluna Ailment Sufferers Panel
Type: Online
Greenfield Online/Toluna Auto Panel
Type: Online
Greenfield Online/Toluna B2B/IT Panel
Type: Online
Greenfield Online/Toluna Entertainment Panel
Type: Online
Greenfield Online/Toluna Global Panel
Type: Online
Greenfield Online/Toluna Leisure Activities Panel
Type: Online
Greenfield Online/Toluna Moms & Babies Panel
Type: Online
Greenfield Online/Toluna Physicians Panel
Type: Online
Greenfield Online/Toluna Teen Panel
Type: Online

Greenfield Online is now part of the Toluna Group, which is the world's largest online sample provider, delivering sample of unrivalled reliability and representation from over 3.7 million panelists worldwide. Offices around the globe ensure local expertise for your projects. Contact us to learn more about how we can serve your online research needs. (See advertisement on p. 6-7)

Hansa/GCR, LLC

Portland, OR
Ph. 503-243-5218
info@hansagcr.com
www.hansagcr.com
Panel Titles:
IT Decision Makers Panel
Size: 40,000 Type: Online

Harris Interactive®

Corporate Headquarters
New York, NY
Ph. 877-919-4765 or 585-272-8400
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.

Toronto, ON
Canada
Ph. 416-487-5439
sales@hotspex.com
www.hotspex.biz
Gera Vevolovich, VP Sales & Marketing
Panel Titles:
Hotspex Global Panel
Size: 4,000,000+ Type: Online

**i.think inc**

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

i.think inc. is a full-service online research company, providing programming, hosting, data collection and tabulation. All services are available as part of a complete study or individually, on an as-needed basis. Real-time online data is available for both quantitative and qualitative research using our own patent-pending software. Our opt-in panel of 1.5 million respondents is also available for sample-only use. (See advertisement on p. 51)

Insight Counts

Hendersonville, TN
Ph. 615-822-5860
darlahall@insightcounts.com
www.insightcounts.com
Darla Hall
Proprietary Panel Mgmt.: Yes
Panel Titles:
Concept Development
Size: 10,000 Type: Online
Consumer Research
Size: 10,000 Type: Telephone, Online
Customer Satisfaction
Size: 10,000 Type: Telephone, Online
Employee Satisfaction
Type: Telephone, Online
Ethnographic Research
Size: 10,000 Type: Online
Focus Groups
Size: 10,000
Home Use Tests
Size: 10,000 Type: Telephone, Online
Product Testing Research
Type: Telephone, Online

InsightExpress, LLC

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

Inter@ctive Market Research srl

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

**InterfaceAsia**

Interface In Design (IID) Inc.
Torrance, CA
Ph. 310-212-7555
kojima@iid-usa.com
www.interfaceasia.com
Tom Kojima
Proprietary Panel Mgmt.: Yes
Panel Titles:
Interface Asia Consumer
Size: 630,000 in Japan; 466,000 in China; 165,000 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.

Ipsos North America

Headquarters
New York, NY
Ph. 212-265-3200
info@ipsos-na.com
www.ipsos-na.com
Panel Titles:
Asia Pacific Panel
Size: 1,507,700 Type: Mail, Online
European Online Panel
Size: 1,660,500 Type: Online
Ipsos CDN CPC Access Panel
Size: 80,000 Type: Mail, Telephone, Online
Ipsos North America Online Panel
Size: 644,500 Type: Online
Ipsos U.S. HTI Panel
Size: 350,000 Type: Mail, Telephone, Online
Latin American Develop Panels
Size: 995,500 Type: Online

Itracks (Canada Talk Now)

Saskatoon, SK
Canada
Ph. 888-525-5026
info@itracks.com
www.canadatalknow.com
Andrea Michaud-Frost
Panel Titles:
Canada Talk Now
Type: Online Panel
USA Talk Now
Type: Online Panel

**JRA, J. Reckner Associates, Inc.**

Reckner Healthcare
Montgomeryville, PA
Ph. 215-822-6220
sphilippe@reckner.com
www.reckner.com
Susan Phillippe
Proprietary Panel Mgmt.: Yes
Panel Titles:
JRA health care Allied Professionals Panel
Size: 200,000+ Type: Online
JRA Physicians Panel
Size: 300,000+ Type: Online
MCO/PBM Payer Panel
Size: 100+ Type: Online

Reckner Healthcare provides access to one of the most extensive databases of verified U.S. physicians and allied health care professionals. Our project managers have extensive experience in local, national and global studies, both qualitative and quantitative. Reckner health care has noted skill in reaching low-incidence or difficult-to-find health care professionals. We bring expertise to every quantitative project, from sample management to complex programming logic and multiple-language surveys. All Internet studies are supervised by experienced project managers and securely hosted on Reckner servers.



KL Communications, Inc.
 Red Bank, NJ
 Ph. 732-224-9991
 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. 83)



Knowledge Networks
 New York, NY
 Ph. 646-742-5300
 know1@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 Type:

Knowledge Networks solves complex problems, providing extraordinary quality and service to business leaders. KN excels in study design, analytics and custom panel creation, delivering affordable, statistically-valid online research through KnowledgePanel® - the only available probability-selected, nationally-representative Internet panel that accurately represents cell phone-only households via dual-frame sampling (random-digit-dial telephone and address-based). Our KnowledgePanel Latino™ enables researchers to conduct statistically-balanced Web-based surveys on the full U.S. Latino population.



Lightspeed Research
 Basking Ridge, NJ
 Ph. 908-630-0542
 info@lightspeedresearch.com
 www.lightspeedresearch.com
 Bonnie Breslauer, Global Development Director
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Lightspeed Automotive Specialty Panel
 Type: Online
 Lightspeed B2B ELITE Opinion Specialty Panel
 Type: Online
 Lightspeed Beauty & Personal Care Specialty Panel
 Type: Online
 Lightspeed Beverages Specialty Panel
 Type: Online
 Lightspeed Consumer Panel
 Type: Online
 Lightspeed Family & Household Specialty Panel
 Type: Online
 Lightspeed Finance Specialty Panel
 Type: Online
 Lightspeed Health and Wellness Specialty Panel
 Type: Online
 Lightspeed Media Consumption Specialty Panel
 Type: Online
 Lightspeed Mobile Phone Specialty Panel
 Type: Online
 Lightspeed Sports and Hobbies Specialty Panel
 Type: Online
 Lightspeed Travel and Leisure Specialty Panel
 Type: Online

Lightspeed Research provides online market research solutions through the creation, management and application of research panels. Our online panels are built to the highest industry standards and enable us to provide research solutions across a broad range of markets. Lightspeed Research is part of Kantar, the information, insight and consultancy division of WPP.

Get More From Your Research Community!

KL Communications provides full-service insights through advanced community and panel management.



www.klcommunications.com

...The Online Community Authority!



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Intelligence from knowledge.™

Luth Research

San Diego, CA
Ph. 800-465-5884
marketing@luthresearch.com
www.luthresearch.com
Janeen Hazel
Proprietary Panel Mgmt.: Yes
Panel Titles:
SurveySavvy

Size: 3,000,000+ Type: Online

Since 1977, 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.



Maktoob Research

Dubai
United Arab Emirates
Ph. 971-4391-3640 (Dubai)
info@maktoob-research.com
www.maktoob-research.com
Tamara Deprez, General Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
Maktoob Research Panel

Size: 1,400,000 Type: Online

Maktoob Research combines the largest online consumer panel in the Middle East and North Africa with the latest in international online research standards. Maktoob Research not only provides full project support to its clients via survey programming, translations and sampling, but also a complete research package from survey development to analysis and reporting, including consultancy. An online research portal can be made available for the full package. Maktoob Research has developed proprietary research software that allows for building questionnaires easily and fast, even the more complex survey designs.
(See advertisement on p. 33)

Market Decisions Corporation

Portland, OR
Ph. 800-344-8725
info@mdcresearch.com
www.mdcresearch.com
Proprietary Panel Mgmt.: Yes

Market Insight, Inc.

State College, PA
Ph. 814-231-2140 or 800-297-7710
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

Fogelsville, PA
Ph. 610-366-7918
mooneagle@marketreaderpro.com
www.marketreaderpro.com
MoonEagle Arndt, Owner
Proprietary Panel Mgmt.: Yes
Panel Titles:

Market Reader Pro™ Consumers (worldwide, mostly
Size: 160,000 Type: Online

MARKETING | SYSTEMS | GROUP

Leadership Through Innovation

Marketing Systems Group

Fort Washington, PA
Ph. 800-336-7674 or 215-653-7100
info@m-s-g.com
www.m-s-g.com
Alan Lambert
Proprietary Panel Mgmt.: Yes

Through its ARCS® 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. 17)



MarketTools, Inc.

San Francisco, CA
Ph. 415-957-2200 or 866-499-3750
info@markettools.com
www.markettools.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
MarketTools ZoomPanel Tech, TrueSample-certified
Type: Online
MarketTools ZoomPanel, TrueSample-certified
Size: 2,000,000+ Type: Mail, Online

MarketTools is the leading provider of customer insight management solutions for the world's market leaders. Through a unique combination of best-in-class insight and feedback platforms, quality-assured global panels and research innovation, MarketTools enables companies to innovate and identify new opportunities, optimize product success and build customer loyalty. As the first company to make online surveys widely available on the Web, MarketTools continues its market-leading position by providing the broadest range of powerful, accurate and integrated customer insight technologies that empower companies to become the most customer-centric organizations in their industries. MarketTools' premier portfolio of technology-based insight brands includes MarketTools.com™, Zoomerang™, CustomerSat™, TrueSample™, ZoomPanel™ and ZoomPanel™ Tech. MarketTools is a privately-held company with corporate headquarters in San Francisco and European headquarters in London.

MarketVision Research®

Cincinnati, OH
Ph. 513-791-3100
jpinnell@mv-research.com
www.mv-research.com
Jon Pinnell, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Viewpoint Forum
Type: Online

Mars Research

Ft. Lauderdale, FL
Ph. 954-771-7725
joyceg@marsresearch.com
www.marsresearch.com
Joyce Gutfreund, Executive Vice President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Mars General Consumer Panel
Size: 250,000 Type: Online



MDLinx, Inc.

Washington, DC
Ph. 202-293-2288
marketresearch@mdlinc.com
www.mdlinc.com/mr
Panel Titles:
MDLinx Online Physician Community
Type: Online

MDLinx, founded in 1999, provides global access to physicians and health care professionals for online surveys and other market research applications. The U.S.-based company offers unmatched online reach in the physician specialist market and can access world-class physician communities in Japan, Korea and Germany. Using our patented invitation control technology and an advanced feasibility calculator, MDLinx can target 747 different specialties of health care professionals and has pioneered a triple verification process. Our CropDuster™ fingerprinting technology protects agencies and end users alike against online fraud and duplicate responders.
(See advertisement on p. 85)

Medimix International

Medimix-Fieldaccess
Miami, FL
Ph. 305-573-5220 or 888-MEDIMIX
bizdev@medimix.net
www.medimix.net
Panel Titles:
Healthcare Professionals Worldwide
Size: 550,000 Type: Telephone, Online



Mindfield Online Internet Panels

(A McMillion Company)
Charleston, WV
Ph. 304-343-9650
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 back cover)

The Minter Group

Mona Vale, NSW
Australia
Ph. 61-2-9979-5277
gminter@minter.com.au
www.minter.com.au
Panel Titles:
Minter Group Panel - Consumer
Size: 7,500 Type: Online
Minter Group Panel - Health Care
Size: 1,000 Type: Telephone, Online

mo'web GmbH

40213 Dusseldorf
Germany
Ph. 49-211-8-28-28-00
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

Thiensville, WI
Ph. 262-236-0194
amurphy@murphyresearch.com
www.murphyresearch.com
Panel Titles:
Sparks® Creative Consumers

NAHB Research Center

Upper Marlboro, MD
Ph. 800-638-8556 or 301-249-4000
jmcaldin@nahbrc.com
www.nahbrc.com
Panel Titles:
NAHB Builder Panel
Size: 2,500 Type: Mail, Telephone, Online
NAHB Consumer Panel
Size: 40,000 Type: Online

National Field & Focus, Inc.

Framingham, MA
Ph. 508-370-7788
info@nff-inc.com
www.nationalfieldandfocus.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
National Field & Focus Consumer Panel
Size: 8,500 Type: Online

National Research Network - Chicago

Chicago, IL
Ph. 312-960-5158
rick.kronenburger@ggp.com
www.nationalresearchnetwork.com
Panel Titles:
NRN Opinion Club
Size: 150,000 Type: Online

The NRN Opinion Club is a proprietary online community featuring thousands of engaged and profiled shoppers from around the country. They're motivated. They're opinionated. And they can't wait to tell you all about it. The ongoing recruitment strategy is unique compared to other online panels as it is developed from an ongoing relationship and dialogue with the American consumer through General Growth Properties' (the nation's second largest shopping mall developer) loyalty program, The Club. Club members are invited to double opt in to NRN Opinion Club, an online panel used exclusively for consumer research.



Nebu

Cincinnati, OH
Ph. 513-321-2150
nebuus@nebu.com
www.nebu.com

Nebu is a leading vendor of panel management and data collection systems for market research. Dub Knowledge, our panel and sampling management tool, is the most advanced system of its type available today. Dub Knowledge can cope with panels of any size, from 1,000 to 5 million or more panelists. It includes all the facilities you need to run any form of panel. Dub InterViewer is a multi-modal Web-based data collection tool for CATI, CAPI and CAWI. Dub InterViewer is a scalable, reliable data collection tool for use on your own system or via SaaS. No project is too complex for Dub InterViewer. (See advertisement on p. 45)

Nextplora S.p.a.

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

MDLinx

www.MDLinx.com/MR

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MUNICH

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Group Company



M3 Japan/M3
TOKYO



M3 Korea/Medigate
SEOUL

NJW Research

Poughkeepsie, NY
 Ph. 845-471-7445
 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

Barrie, ON
 Canada
 Ph. 866-657-8753
 shane@nooro.com
 www.nooro.com
 Edward Knight
 Proprietary Panel Mgmt.: Yes

NovaTest

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

The NPd Group, Inc.

Port Washington, NY
 Ph. 516-625-0700
 info@npd.com
 www.npd.com
 Panel Titles:
 NPd Online Research Panel
 Size: 2,500,000 Type: Online



Olson Research Group, Inc.
 Marketing Research
 Quality Data Collection | Recruitment | Analysis

Olson Research Group, Inc.

Warminster, PA
 Ph. 267-487-5500
 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.



OMI Online Market Intelligence

Moscow
 Russia
 Ph. 00 7 499 978 5139
 ashashkin@omirussia.ru
 www.omirussia.ru/en/
 Dr. Alexander Shashkin, CEO
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 B2B IT Panel Russia
 Size: 6,874 Type: Online
 B2C Automotive Panel Russia
 Size: 51,207 Type: Online
 B2C Panel Baltic States (Lithuania, Latvia, Estonia)
 Size: 8,963 Type: Online
 B2C Panel Belarus
 Size: 7,207 Type: Online
 B2C Panel Kazakhstan
 Size: 5,183 Type: Online
 B2C Panel Russia
 Size: 167,114 Type: Online
 B2C Panel Ukraine
 Size: 23,580 Type: Online

Online Market Intelligence (OMI) provides high-quality online fieldwork in Russia, Ukraine, Kazakhstan, Belarus and the Baltic states. With OMI online panels you can access over 200,000 consumers and 6,000 IT professionals recruited from a wide variety of local Web-portals. Our panels are in full compliance with ESOMAR and CASRO standards; deep profiling and accurate targeting are available; advanced quality control procedures have been implemented and response rates are as high as 50%. In addition, OMI provides questionnaire translation, 24x7 survey programming, data processing, coding and cross tabulation and recruiting proprietary panels in Russia and CIS countries.
 (See advertisement on p. 86)

OnCampus Research

Oberlin, OH
 Ph. 440-775-7777
 info@oncampusresearch.org
 www.oncampusresearch.com
 Panel Titles:
 OnCampus Student Panel
 Size: 10,400 Type: Online



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rfp@omirussia.ru

Opinion Search Inc.

Ottawa, ON
Canada
Ph. 800-363-4229 or 613-230-9109
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 a full suite of online services including survey programming, hosting, coding, cleaned and labeled data files and cross tabulation. Our consumer panel is extensively profiled, with national coverage and includes variables relevant to B2B research projects. Our proprietary Propensity Score 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 p. 87)

Osterman Research, Inc.

Black Diamond, WA
Ph. 253-630-5839
info@ostermanresearch.com
www.ostermanresearch.com
Michael Osterman
Panel Titles:
Osterman Research Panel
Type: Online

Outsource Research Consulting

Aptos, CA
Ph. 877-672-8100
contactus@orconsulting.com
www.orconsulting.com
Nico Peruzzi, Ph.D., Partner
Proprietary Panel Mgmt.: Yes

Peanut Labs

San Francisco, CA
Ph. 415-659-8266 x810
sean@peanutlabs.com
www.peanutlabs.com
Sean Case, V.P. Sales and Client Services
Panel Titles:
Canadian Gen-Y Panel (13-29 Years Old)
Size: 193,490 Type: Online
Canadian Socially Networked Sample (13-65 Yrs Old)
Size: 245,900 Type: Online
U.S. Gen X-Panel (30-55 Years Old)
Size: 1,867,200 Type: Online
U.S. Gen-Y Panel (13-29 Years Old)
Size: 1,310,010 Type: Online
U.S. Socially Networked Sample (13-65 Years Old)
Size: 3,379,000 Type: Online

Pearson, S.A. de C.V.

Mexico, DF
Mexico
Ph. 52-55-5531-5560 or 52-55-5531-5324
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)
Manhasset, NY
Ph. 516-365-7979
Steven.Levitt@qscores.com
www.qscores.com
Steve Levitt, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
People Panel - Consumer Panel, The
Size: 100,000 Type: Mail, Telephone

Persuadable Research Corporation

Overland Park, KS
Ph. 913-385-1700 x302
cmiller@persuadables.com
www.persuadables.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Persuadable Research Panel
Size: 1,000,000 Type: Online

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Physicians Consulting Network

Mt. Arlington, NJ
 Ph. 800-241-2953
 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.

Precision Research Inc.

Glendale, AZ
 Ph. 602-997-9711
 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.

Lake Worth, FL
 Ph. 561-965-8300
 profile@profile-mktg-res.com
 www.profile-mktg-res.com
 Proprietary Panel Mgmt.: Yes

Pulse Group

Kuala Lumpur
 Malaysia
 Ph. 603-2167-6666
 info@pulse-group.com
 www.pulse-group.com
 Bob Chua, CEO
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 www.planet-pulse.com
 Size: 2,300,000 Type: Telephone, Online

QFACT Marketing Research, LLC.

Cincinnati, OH
 Ph. 513-891-2271
 info@qfact.com
 www.qfact.com
 Kristen Monroe, Business Development Exec.
 Proprietary Panel Mgmt.: Yes



ReRez

Dallas, TX
 Ph. 214-239-3939
 debbiep@rerez.com
 www.rerez.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 ReRez B2B Panel
 Type: Telephone, Online
 ReRez Consumer Panel
 Type: Telephone, Online
 ReRez Hispanics Panel
 Type: Telephone, Online
 ReRez Physicians Panel
 Type: Telephone, Online

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 p. 88)

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Research Now - San Francisco

- San Francisco, CA
Ph. 415-392-4300
quote@researchnow-usa.com
www.researchnow-usa.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
- Research Now Argentina Online Panel
Size: 12,700 Type: Online
 - Research Now Australia Online Panel
Size: 168,000 Type: Online
 - Research Now Austria Online Panel
Size: 20,000 Type: Online
 - Research Now Belgium Online Panel
Size: 19,300 Type: Online
 - Research Now Brazil Online Panel
Size: 18,500 Type: Online
 - Research Now Canada Online Panel
Size: 400,000 Type: Online
 - Research Now Chile Online Panel
Size: 11,800 Type: Online
 - Research Now China Online Panel
Size: 122,600 Type: Online
 - Research Now Czech Republic Online Panel
Size: 19,900 Type: Online
 - Research Now Denmark Online Panel
Size: 16,900 Type: Online
 - Research Now Finland Online Panel
Size: 13,400 Type: Online
 - Research Now France Online Panel
Size: 145,000 Type: Online
 - Research Now Germany Online Panel
Size: 150,400 Type: Online
 - Research Now Greece Online Panel
Size: 5,500 Type: Online
 - Research Now Hong Kong Online Panel
Size: 18,500 Type: Online
 - Research Now Hungary Online Panel
Size: 5,500 Type: Online
 - Research Now India Online Panel
Size: 37,500 Type: Online
 - Research Now Ireland Online Panel
Size: 41,800 Type: Online
 - Research Now Italy Online Panel
Size: 82,700 Type: Online
 - Research Now Japan Online Panel
Size: 40,000 Type: Online
 - Research Now Malaysia Online Panel
Size: 11,200 Type: Online
 - Research Now Mexico Online Panel
Size: 19,300 Type: Online
 - Research Now Netherlands Online Panel
Size: 22,400 Type: Online
 - Research Now New Zealand Online Panel
Size: 43,000 Type: Online
 - Research Now Norway Online Panel
Size: 14,700 Type: Online
 - Research Now Poland Online Panel
Size: 22,200 Type: Online
 - Research Now Portugal Online Panel
Size: 9,000 Type: Online
 - Research Now Russia Online Panel
Size: 46,000 Type: Online
 - Research Now Singapore Online Panel
Size: 20,000 Type: Online
 - Research Now South Korea Online Panel
Size: 27,200 Type: Online
 - Research Now Spain Online Panel
Size: 86,000 Type: Online
 - Research Now Sweden Online Panel
Size: 23,500 Type: Online
 - Research Now Switzerland Online Panel
Size: 15,900 Type: Online
 - Research Now Taiwan Online Panel
Size: 15,000 Type: Online
 - Research Now UK Online Panel
Size: 352,500 Type: Online
 - Research Now U.S.A Online Panel
Size: 584,500 Type: Online

Research Now are the online data collection and panel specialists. We have unrivaled panel reach and quality, offering

international online data collection across 36 proprietary, research-only online panels in North and Latin America, Europe and Asia-Pacific. We offer some of the most highly-profiled, most broadly-recruited, most frequently-refreshed and most cared-for online panels available to researchers. (See advertisement on p. 3)



Research Results, Inc.
TECHNOLOGY TALENT SOLUTIONS
Fitchburg, MA
Ph. 978-345-5510
info@researchresults.com
www.researchresults.com
Robert Favini
Proprietary Panel Mgmt.: Yes

ResearchByNet
Toronto, ON
Canada
Ph. 800-461-3924 or 416-493-6111
info@researchbynet.com
www.researchbynet.com
Carrie Moyer, Director of Online Research
Proprietary Panel Mgmt.: Yes
Panel Titles:
Canadian Consumer Panel
Size: 200,000 Type: Online

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theSampleNetwork.com



Resolution Research & Marketing, Inc.®

Denver, CO
 Ph. 800-800-0905
 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

Experts in the recruitment, management and hosting of custom proprietary panels including data collection and on-going maintenance. Our panel software includes a branded Web portal which supplies a log-in page for panelists to access and update information and view survey and incentive history. Balanced, statistically-correct samples are drawn based upon demographics, as well as panelist response rates and activity in previous surveys to maximize participation rates for future or ongoing research. Superb tracking benefits.

Resonance Insights

Salem, MA
 Ph. 978-740-4474
 information@resonanceinsights.com
 www.resonanceinsights.com
 Panel Titles:
 Resonance Online Household Panel (U.S./Canada)
 Type: Online

**Resource Systems Group, Inc.**

White River Junction, VT
 Ph. 802-295-4999
 cadams@rsginc.com
 www.rsginc.com
 Leslie Rimmer
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Fortunecouncil.com
 Size: 7,000 Type: Online
 Momconnection.com
 Size: 6,000 Type: Online

Resource Systems Group (RSG) is a market research consulting firm specializing in sophisticated data collection and analysis methods to help clients make informed decisions. RSG designs and manages custom online panels to meet a wide variety of client needs. Low-touch panels require only periodic contact with members, whereas high-touch panels support real-time chat, bulletin boards, selected results, instant polling and more. One of our panels, MomConnection, was featured in "Digital Moms: A Research Community, Not a Panel" at the 2008 ESOMAR conference in Dublin. For more information, see www.rsginc.com/panel-capabilities/.

RestaurantInsights.com

Columbia, SC
 Ph. 803-798-6373
 fred@restaurantinsights.com
 www.restaurantinsights.com
 Fred Efid
 Panel Titles:
 RestaurantInsights.com Consumer Panel
 Size: 3,000,000

**Ricca Group, Inc.**

Feasterville, PA
 Ph. 866-963-3000
 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.

RNB Research: Fieldwork Specialist for Asia

New Delhi
 India
 Ph. 91-11-25461415
 info@rnbresearch.com
 www.rnbresearch.com
 Pramod Q. Kumar, Client Dev. Manager
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 RMB Small Business Panel
 Size: 29,734 Type: Online
 RNB Consumer Ailment Panel
 Size: 9,368 Type: Online
 RNB Healthcare Panel
 Size: 12,640 Type: Online
 RNB HR Decision Makers Panel
 Size: 7,612 Type: Online
 RNB IT Decision Makers Panel
 Size: 8,947 Type: Online
 RNB Nurses Panel
 Size: 24,235 Type: Online
 RNB Research B2B Panel
 Size: 59,431 Type: Online
 RNB Research Consumer Panel
 Size: 122,608 Type: Online
 RNB Research Physicians Panel
 Size: 36,128 Type: Online
 RNB Youth Panel
 Size: 57,682 Type: Online

RONIN Corporation

London
 United Kingdom
 Ph. 44-20-7091-1400
 info@ronin.com
 www.ronin.com/dc
 Anton Richter, Bus. Dev. Manager
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 RONIN Health Care International Panel
 Size: 350,000 Type: Telephone, Online
 RONIN IT International Panel
 Size: 250,000 Type: Telephone, Online

Sample Czar, Inc.

Los Angeles, CA
 Ph. 323-325-9465
 info@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 Patients / Find A Cure Panel
 Type: Online

**The Sample Network**

Cherry Hill, NJ
 Ph. 888-572-3255
 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 p. 89)

Shifrin-Hayworth

Southfield, MI
 Ph. 248-223-0020 or 800-559-5954
 research@shifrin-hayworth.com
 www.shifrin-hayworth.com
 Mark Shifrin, President
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 National Database - U.S.A
 Size: 200,000 Type: Mail, Telephone, Online

Signet Research, Inc.

Cliffside Park, NJ
 Ph. 201-945-6903 or 201-945-6904
 joanna@signetresearch.com
 www.signetresearch.com
 Joanna Zanolpoulo, President
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Reader Panels - Publication Specific-Customised

Specpan

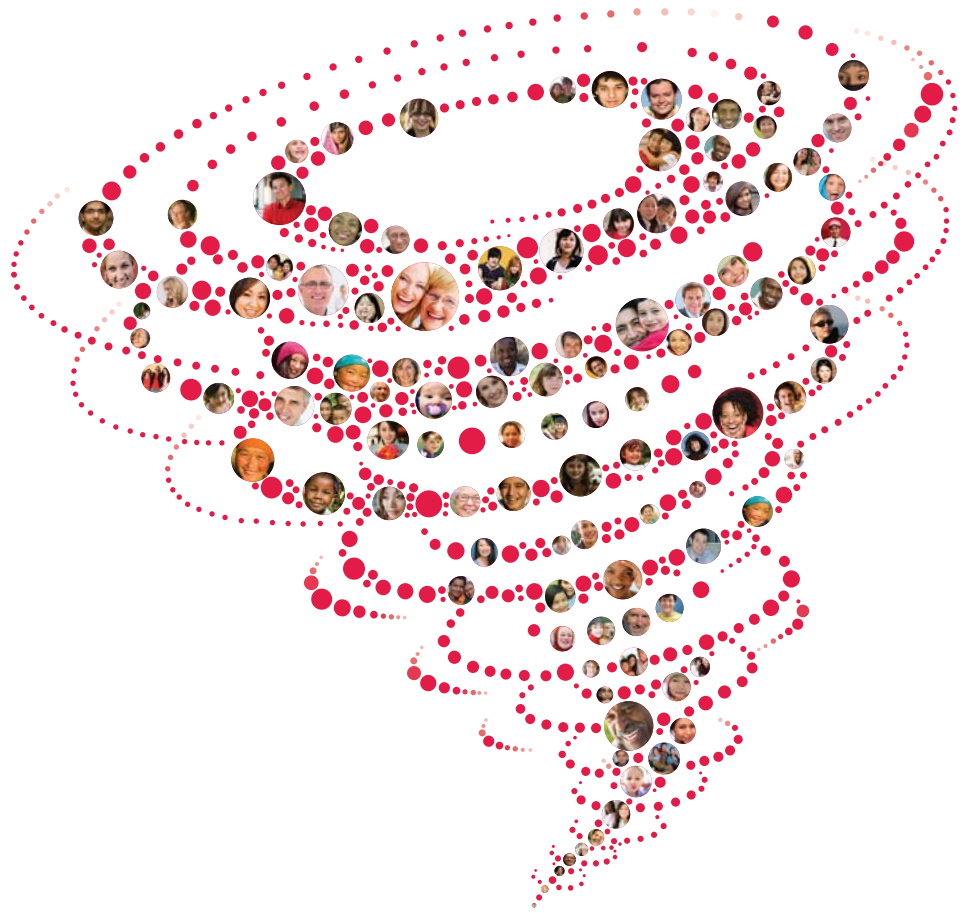
Indianapolis, IN
 Ph. 866-SPECPAN
 sales@specpan.com
 www.specpan.com
 Panel Titles:
 Building & Construction Industry Professionals
 Size: 25,000 Type: Online

SpectraCom, Inc.

Milwaukee, WI
 Ph. 414-272-7742
 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

Sports Marketing Surveys Ltd.

Wisley, Surrey
 United Kingdom
 Ph. 44-1932-350600
 info@sportsmarketingsurveys.com
 www.sportsmarketingsurveys.com
 Panel Titles:
 Sporting Insights
 Size: 40,000 Type: Online



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Seoul • Shanghai • Shelton, CT • Singapore • Stockholm • Sydney • Tokyo • Toronto
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Survey Sampling International

Survey Sampling International

Shelton, CT

Ph. 203-567-7200

info@surveysampling.com

www.surveysampling.com/

Christopher DeAngelis

Proprietary Panel Mgmt.: Yes

Panel Titles:

Surveyspot.com (U.S.A)

Type: Online

www.Asiktstorget.se (Sweden)

Type: Online

www.Meinungswelt.at (Austria)

Type: Online

www.Meinungswelt.ch (Switzerland)

Type: Online

www.Meinungswelt.de (Germany)

Type: Online

www.Meningstorget.no (Norway)

Type: Online

www.Mielipidemaailma.fi (Finland)

Type: Online

www.Mondodiopinione.it (Italy)

Type: Online

www.Opinieland.be (Belgium)

Type: Online

www.Opinieland.nl (Netherlands)

Type: Online

www.Opiniolandia.es (Spain)

Type: Online

www.Opinionsland.com (Denmark)

Type: Online

www.Opinionworld.cn (China)

Type: Online

www.Opinionworld.co.uk (UK)

Type: Online

www.Opinionworld.com.ar (Argentina)

Type: Online

www.Opinionworld.com.au (Australia)

Type: Online

www.Opinionworld.com.br (Brazil)

Type: Online

www.Opinionworld.com.mx (Mexico)

Type: Online

www.Opinionworld.hk (Hong Kong)

Type: Online

www.Opinionworld.jp (Japan)

Type: Online

www.Opinionworld.kr (South Korea)

Type: Online

www.Opinionworld.tw (Taiwan)

Type: Online

www.Opinionworld-Ireland.com (Ireland)

Type: Online

www.Opinionworld-Singapore.com (Singapore)

Type: Online

www.Placedesopinions.fr (France)

Type: Online

www.Surveyspot.com (Canada)

Type: Online

www.Swiatopinii.pl (Poland)

Type: Online

Survey Sampling International is the premier global provider of sampling solutions for survey research. SSI offers access to more than 6 million consumer and business-to-business research respondents in 54 countries via Internet, telephone and mobile. Additional client services include custom profiling, survey programming and hosting, data processing, sampling consulting and survey optimization. SSI serves more than 1,800 clients, including nearly three-quarters of the top researchers worldwide. Founded in 1977, SSI has an international staff of 400 people representing 50 countries and 36 languages. The company has 17 offices around the world for local client support. For more information, visit www.surveysampling.com. (See advertisement on p. 91)

Survey.com

San Jose, CA

Ph. 408-850-1227

michael@survey.com

www.survey.com

Proprietary Panel Mgmt.: Yes

Panel Titles:

Business ePanel

Size: 250,000+ Type: Online

Consumer ePanel

Size: 5,000,000+ Type: Online

Global Consumer Panel

Size: 2,000,000+ Type: Online

IT Decision Maker ePanel

Size: 50,000+ Type: Online

Synovate

Chicago, IL

Ph. 312-526-4000

jennifer.chhatiani@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

West Perth, WA

Australia

Ph. 61-8-9321-5415

www.synovate.com

Panel Titles:

The Buzz

Synovate New Zealand-Auckland

Auckland

New Zealand

Ph. 64-9-538-0500

newzealand@synovate.com

www.synovate.com/newzealand

Panel Titles:

Healthtracker

Size: 500 Type: Online

Taylor Nelson SOFRES plc.

London

United Kingdom

Ph. 44-20-8967-0007

enquiries@tnsofres.com

www.tnsofres.com

Judith Passingham

Panel Titles:

6th Dimension Consumer Panel

TNS Worldpanel

Type: Online

Team Vier b.v.

JW Amstelveen

Netherlands

Ph. 31-20-645-53-55

info@teamvier.nl

www.teamvier.nl

Hans Van Gool

Proprietary Panel Mgmt.: Yes

Panel Titles:

Team Vier CATI Panel

Size: 12,000 Type: Telephone

Team Vier WAPI Panel

Size: 8,000 Type: Online

TechTarget, Inc.

Needham, MA

Ph. 781-657-1000

tcogan@techtarget.com

www.techtarget.com

Toby Cogan, Market Research Manager

Proprietary Panel Mgmt.: Yes

Panel Titles:

TechTarget IT Research Panel

Size: 500,000 Type: Online

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www.thinkvirtualfieldwork.com

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Proprietary Panel Mgmt.: Yes

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info-us@tns-global.com

www.tns-global.com

Panel Titles:

TNS Baby Panel

Size: 200,000 Type: Online

TNS Chronic Ailment Panel

Size: 600,000 online; 150,000 off line Type: Mail,

Telephone, Online

TNS Hispanic Panel

Size: 55,000 Type: Online

TNS Investor Panel

Size: 300,000 Type: Online

TNS Occupation & Industry Panel

Size: 400,000 Type: Online

TNS Panel

Size: 800,000 online; 400,000 off line Type: Mail,

Telephone, Online

TNS Hong Kong

Wan Chai

Hong Kong

Ph. 852-2116-8888

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

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Size: 22,000 Type: Online

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Size: 10,000 Type: Online



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getinfo@toluna.com
www.toluna-group.com
Keith Price, President
Proprietary Panel Mgmt.: Yes

Panel Titles:

- Toluna Panel - Argentina
Type: Online
- Toluna Panel - Australia
Type: Online
- Toluna Panel - Austria
Type: Online
- Toluna Panel - Belgium
Type: Online
- Toluna Panel - Brazil
Type: Online
- Toluna Panel - Canada
Type: Online
- Toluna Panel - Chile
Type: Online
- Toluna Panel - China
Type: Online
- Toluna Panel - Czech Republic
Type: Online
- Toluna Panel - Denmark
Type: Online
- Toluna Panel - Finland
Type: Online
- Toluna Panel - France
Type: Online
- Toluna Panel - Germany
Type: Online
- Toluna Panel - Greece
Type: Online
- Toluna Panel - Ireland
Type: Online
- Toluna Panel - Italy
Type: Online
- Toluna Panel - Japan
Type: Online
- Toluna Panel - Mexico
Type: Online
- Toluna Panel - Netherlands
Type: Online
- Toluna Panel - Norway
Type: Online
- Toluna Panel - Peru
Type: Online
- Toluna Panel - Poland
Type: Online
- Toluna Panel - Portugal
Type: Online
- Toluna Panel - Russia
Type: Online
- Toluna Panel - Singapore
Type: Online
- Toluna Panel - Spain
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Ted Kendall
Proprietary Panel Mgmt.: Yes



United Sample, Inc.

Encino, CA
Ph. 818-524-1218
sales@unitedsample.com
www.unitedsample.com
Panel Titles:
United Sample
Size: 1,000,000 Type: Online

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Untiedt Research GmbH

Hattigen
Germany
Ph. 02324-98-33-91
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 U.S.A
Size: 51,000 Type: Online

User Insight

Atlanta, GA
Ph. 770-391-1099
contact@userinsight.com
www.uifacilities.com
Proprietary Panel Mgmt.: Yes

Vernon Research Group

Cedar Rapids, IA
Ph. 319-364-7278 x108 or 888-710-7278
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www.vernonresearch.com
Panel Titles:
Vernon Research Opinion Panel
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 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Virtual Surveys
 Size: 150,000 Type: Online

Vision Critical

Vancouver, BC
 Canada
 Ph. 604-647-1980
 vancouver@visioncritical.com
 www.visioncritical.com
 Jason Smith, President/COO, Sparq Div.
 Proprietary Panel Mgmt.: Yes

Vovici Corporation

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 www.worldone.com
 Douglas Fedele
 Panel Titles:
 WorldOne's Global Dentist Panel
 Size: 12,700 Type: Online
 WorldOne's Global IT Panel
 Size: 35,000 Type: Online
 WorldOne's Global Nurse Panel
 Size: 40,000 Type: Online
 WorldOne's Global Pharmacists Panel
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Copenhagen
 Denmark
 Ph. 45-70-27-22-24
 info@zapera.com
 www.yougov.dk
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 AEldresagen (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

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 Ph. 650-462-8000
 sales@polimetrix.com
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 Elizabeth Christie, Director of Client Services
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 Sample Czar Patients / Find A Cure Panel, Sample Czar, Inc. p. 90
 SurveySavvy, Luth Research p. 84
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Eisenberg book looks at why we buy

In these dark times, being more of a glass-half-full guy, I was drawn to Lee Eisenberg's new book by its hopeful title: *Shoptimism: Why the American Consumer Will Keep On Buying No Matter What*.

Eisenberg, who authored the best-selling *The Number*, is a former *Esquire* editor who also served as executive vice president at Lands' End. (For me, a larger claim to fame is his role as a participant in the first Rotisserie baseball league.) His new work is an eminently readable, if severely abridged, history of the psychology of the American consumer.

The subtitle is a bit of a red herring. I'm sure it and even the title are aimed at catching the eye of harried retailers and marketers, who are desperate for any bit of good news these days. I don't think they need to worry quite so much. Media coverage of trends like The New Frugality aside, of course people will still keep buying. We're Americans, after all. It's what we do.

The book is not so much an attempt to reassure but more to reassess. In the course of his leisurely and enjoyable stroll through consumerism, Eisenberg doesn't uncover or claim to have uncovered one main reason why we buy, which will no doubt disappoint readers who are looking for that type of revelation. Rather, through interviews with some of the oft-cited thinkers and intelligent, easily-digestible summaries of the main ideas of others, he offers a good overview of

the many theories on why we buy, one that introduces and highlights the ideas of writers like Thorstein Veblen, Vance Packard, Gerald Zaltman, Dan Ariely and Paco Underhill and allows the reader to make worthwhile comparisons.

Personal experiences

Eisenberg grounds his journey in his own personal experiences as a consumer (some of the anecdotes are enlightening, some are distracting) and thanks to his playful style and liberal use of a slangy lexicon of terms like Sell Side, Advangelists, Adbashers and Buy Scolds, the proceedings are never dull. Here's a passage from the section on how marketers (the Sell Side) gather and use information on our buying habits:

"You may be in a hurry or you may be killing time. You may be on a specific buying mission of simply browsing. You may be a regular customer or a one-time drive-by. You may be young, old, in between. You may be rich or trying hard to scrape by. You may be somebody or nobody. Check that. To the Sell Side, nobody's nobody. Everybody amounts to an actionable intelligence: precious, detailed, and copious. So the Sell Side keeps its eyeballs fixed. There's nothing seriously threatening about it, nothing untoward. For the Sell Side, it just pays to snoop."

The opening sections of the book are a whirlwind tour of great moments in motivational research history, touching

on Packard and Ernest Dichter and the many ways that sex may or may not be part of our consumption choices.

Elsewhere he explores various currently popular theories (brands are dead, consumer-generated buzz is king, etc.) by visiting some of the companies proferring those theories. Recounting his interview with veteran shopping analyst Paco Underhill, he notes Underhill's "big headline" for the early 21st century: the brand war is over. Meaning that private labels have won, that while we are aware of brand names, their power is "evaporating in the face of comparable and cheaper alternatives."

"As this trend expands," Eisenberg writes, "we'll have less reason to talk ourselves into believing, or allow the brand to talk us into believing, that Huggies fulfill their diapering responsibilities any better than Walgreen's nappies. Widespread generic substitution is but one sign that we now live in the Age of Cheap..."

Other interesting sections include his looks at the people who are investigating how our brains respond to the act of buying. He cites the specific brain regions that are excited (or repelled) by the act of opening up one's purse or wallet and finds out why that poor robot in the General Motors spot from the 2009 Super Bowl produced "feelings of economic security" in some viewers.

He charts the downsides of bucketing, his term for the use of demographics and other data to

predict what we will do as consumers, one of which is its imprecise nature.

That imprecision is one of the many reasons I sympathize with marketers. For as many labels you can put on us, as many buckets as you can drop us into, for as many messages you can target at us, we are still human, after all, and that makes us prone to acting on a whim, or not acting at all. Everything can have aligned perfectly to facilitate a sale, and the buyer can still turn on a dime and walk out the door.

To me, the act of marketing ends up being one of playing percentages. Your data shows that consumers who live here, who read these magazines or frequent these Web sites are more likely than others who don't to be interested in your product. So you craft the best message, put it in a place you think will reach them and then cross your fingers.

Eisenberg writes about how Packard and other commentators tend to ascribe dark intentions to all of the marketers out there who are keeping tabs on us and constantly attempting to manipulate us. Undoubtedly a lot of that manipulation works, but again, just look at the amount of time, money and brainpower going into figuring out what drives us to spend. In many ways, while we are more knowledgeable about the motivations behind buying, it feels like layers of an onion are being peeled away. We're no closer to the Buy Button than we were before. As long as we continue exhibiting our maddeningly human traits I think in the game of marketing it will always be advantage: consumer.

Helpful reminder

With its quasi-historical perspective, the book is also a helpful reminder, in this age where terms like groundbreaking and revolutionary are applied all too liberally to "new" modes of marketing and marketing theory, of how few really original ideas there are out there and also how consumers' buying habits have been vexing marketers for decades. For example, branded entertainment undertakings like BMW's slate of Web-only mini-films starring Clive Owen as The Driver were really not that different from the 1920s radio show The Maxwell House Hour or The Wrigley Party, yet they were heralded as cutting-edge when they debuted in 2001. (To be fair, the BMW shorts were also tremendously successful!)

The last chapter, Shoptimism, makes some final observations, in the form of four "Good Buys," and offers tips on how readers themselves can make the act of buying (or not buying) more satisfying. Rather than focus on buying things as a source of satisfaction, Eisenberg recommends tracking your activities for a weekend and then going back and grading them on a scale to see how happy or worried or frustrated, etc., each activity made you. Once you compile your happiness/unhappiness scores, do more of what makes you happy. Sounds easy, right?

There are no real ahas here but rather an equally satisfying number of nods of the head, as Eisenberg's observations, or explanations of others' observations, hit home. The book is likely to be stimulating for most marketers and researchers on a professional level while also being enjoyable for personal reasons. We're all consumers after all, and who doesn't like to spend a few moments pondering the many factors that underlie how and why we spend our money? | Q

Shoptimism: Why the American Consumer Will Keep On Buying No Matter What (334 pages; \$26.00) is published by Free Press (www.simonandschuster.biz).

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Quirk's Marketing Research Review, (ISSN 08937451) is issued monthly by Quirk Enterprises, Inc., 4662 Slater Road, Eagan, MN 55122. Mailing address: P.O. Box 22268, Saint Paul, MN 55122. Tel.: 651-379-6200; Fax: 651-379-6205; E-mail: info@quirks.com; Web address: www.quirks.com. Periodicals postage paid at Saint Paul, MN and additional mailing offices.

Subscription Information: U.S. annual rate (12 issues) 70; Canada and Mexico rate 120 (U.S. funds); international rate 120 (U.S. funds). U.S. single copy price 10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change.

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Coming in the December issue...

What's new in Web-based qualitative?

A moderator talks about some of her favorite online tools for qualitative research, including in-situ narrations, wireless Web cams and virtual communities.

Quality qual-quant

Qual-quant studies are often treated as series of discrete projects strung together, with little consideration of how to align each phase. Read tips on making them run more smoothly.

The power of stories

How storytelling can help explore and improve customer loyalty.

Qualitative research and the innovation economy

With companies now seeking more input from consumers on product and service creation, how can qualitative researchers help?

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cover-to-cover

Facts, figures and insights from this month's issue



Some consumer products, including some high-tech devices that have entered the marketplace relatively recently, appear so far to be recession-proof. A relative newcomer in the everyday lives of most Americans, the cell phone is among a handful of newer gadgets that have held their own on the necessity scale from 2006 to 2009. (page 10)



A great way to capture and capitalize on the backroom dynamic is through dual moderating. Having a seasoned professional interacting with clients during the research helps to more efficiently collect backroom brainstorming, frame the learning and provide more timely and focused analysis. (page 21)



Panel quality is often inversely related to panel profitability. Heavy responders pay back what it cost to recruit them very quickly and then continue to produce virtually nothing but profit. They are the "cash cows" panel managers are reluctant to cut out. (page 40)



Impressions of length seem to be based as much on the respondents' sense of tedium as on the actual time spent completing the survey. For those in the engaging cell, respondents often felt that the survey was long; however, because they weren't bored by it, the length was not particularly bothersome. (page 50)



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Congratulations to September's winner, Thomas R. Burningham of Associated Food Stores, Salt Lake City. September's prize was a free copy of Remark Web Survey Professional from Gravic Inc.

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