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Marketing Research Review

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Could researchers get answers from Facebook Questions?

Facebook has announced the launch of Facebook Questions, a tool designed to allow users to post polls and questions about subjects of their choice, soliciting their friends - or the entire Facebook population - for information and opinions. The service has gone through beta testing and will be further developed with the test group's feedback in mind; a release date is expected in late 2010.

Whether Facebook Questions will serve as a casual form of research or a more recreational "What song is it that goes X?" or "Which shoes looks better with this belt?" remains to be seen, but company and brand Facebook pages will also have the ability to gauge how consumers feel about new products or potential launches and also establish a forum where users and brand fans can be heard right from the comfort of their own Facebook profiles.

Facebook Questions will appear on the user's profile and will also appear in the user's friends' News Feed, so answers are anticipated to be personalized and especially relevant to the poster. Photos can also be added if the user is trying to identify something, such as a type of flower in their garden.

The "social" aspect of Facebook Questions comes in the form of question suggestions and the helpful/unhelpful checkbox. Whenever polls or questions have been answered, users can post them to their own or their friends' profiles, and if a user sees a question for which a friend might have an answer, the user can "suggest" that question for the friend. Facebook Questions will also have a feature similar to ones seen on Digg, Amazon.com and Yahoo! Answers, where the users viewing or responding to the question can (anonymously) mark whether they found a respondent's answer helpful or unhelpful. The most helpful answers will rise to the top. Users are also able to "follow" questions, so that a notification will be sent when another user responds to the question.

Research reveals the components for happiness among Americans

It seems money can buy happiness after all, as the happiest Americans are extroverts with an annual household income of \$75,000 or more (82 percent very or somewhat happy), according to a study from Keirse Research, San Mateo, Calif. The least-happy Americans are the unemployed (46 percent), closely followed by those who are separated but not divorced (48 percent).

Keirse Research asked over 3,900 Americans to rate their level of happiness, considering such factors as household income, love, work and family. "If survival is the primary human goal, happiness comes in at a close second," said Kip Parent, CEO, Keirse Research. "It is such a multifaceted emotion that is impacted by numerous variables, from personality type to age to parenting status."

Individual happiness was also correlated with the following factors:

Personality. Sixty-three percent of Americans rate themselves as very or somewhat happy. Extroverts (74 percent), however, are much happier than introverts (56 percent).

Wealth. In general, the higher the household income, the happier the individual: 72 percent of those with an annual household income of \$75,000 or more are very or somewhat happy, compared to 59 percent of those with an annual household income of \$50,000 or less.

Love. Not surprisingly, being engaged promotes above-average happiness (71 percent very or somewhat happy). Those who are separated but not divorced are least happy when it comes to love (48 percent).

Age. Americans get progressively happier as they get older, with one exception. Happiness takes a dip between the ages of 35-44 (58 percent are very or somewhat happy), when parental and career pressures are typically at their peak.

Family. Empty-nesters are most happy (73 percent very or somewhat happy), while those who are divorced and sharing custody are least happy (56 percent). Individuals who do not have children cite average happiness (62 percent).

Education. In most cases, more education means more happiness. There was no difference, however, between the happiness of those with a Bachelor's degree and those with a graduate degree (68 percent very or somewhat happy).

Politics. Democrats and Republicans are equally happy (roughly 70 percent very or somewhat happy), while Green Party affiliates are the least happy (52 percent).

What Walmart moms can tell us about the swing vote

Ten middle-class Walmart moms from the St. Louis area were gathered together in September 2010 for a focus group and paid \$75 to answer questions that might offer clues to what the Walmart moms segment - estimated to account for 16 percent of all U.S. voters - would do concerning this month's midterm elections. According to Todd C. Frankel's September 17, 2010, article "Listening to the Walmart Moms in St. Louis," in the *St. Louis Post-Dispatch*, the Walmart moms were the coveted group of swing voters for 2010 just as soccer moms and NASCAR dads were the popular brains to pick in elections past.

As corporations seek to understand their consumer base, certain demographic groups could prove useful in matters beyond the scope of marketing and sales.

Walmart's domination in discount retailing draws in consumers of all walks of life, but it seems that in St. Louis - a major city in one of the nation's most notorious swing states - moms who shop at Walmart are not so different from one another. What did these Walmart moms have in common? They had young children at home. They had moderate political leanings - whether left or right. And they had each shopped at Walmart in the past month, suggesting frugality and a common touch.

The focus group, one of three like it (the other two were held in Denver and Philadelphia), was paid for by Walmart; videotaped; and broadcast via a live, closed-circuit videofeed to reporters and political analysts in Washington, D.C.

The moderator, Nicole Yakatan, began simply: How do you feel about the way things are going in the country? Their one-word answers were, in a word, bleak: unsettling; uneasy; stagnated; awful; sad; sucks; divided. Their concerns were that the state of the nation was only getting worse, as the gap between the rich and the poor widens, effectively wiping out the middle class.

The respondents' attitude toward politics was disenchanting at best. They felt cut off from national politics, were ambivalent toward President Obama and wanted nothing to do with the constant commotion in Congress. Instead, these moms have a focus on local issues, such as better employment opportunities in Missouri and improved state schools.

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So much of the qualitative research conducted in France is done only in Paris which is an important historical, cultural and financial center for the country. HOWEVER - Paris represents only 8 million of the 63 million inhabitants of the entire country and the other 55 million French people living outside of Paris live a very different lifestyle, have a different cultural climate and way of thinking. To not gather opinions from other major population centers in France is to not study the bulk of the consumers and business decision makers in the country.

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Commonality found among shopping styles across the world

Global consumer packaged goods (CPG) shoppers should not be defined by their country but instead by their shopping attitudes and behavior – especially their attitudes toward price and their propensity to pre-plan their CPG purchases, according to a study conducted by Ipsos Marketing, a division of New York research company Ipsos



North America.

Ipsos has identified five different types of CPG shoppers that can be found around the world in varying degrees. The five shopper segments are:

Brand Lovers (19 percent): The distinguishing trait of these shoppers is spending money on brands that may be more expensive than alternatives. These shoppers are the ones who are more influenced by store staff and place a greater value on convenience.

Price Driven (23 percent): With fixed budgets for grocery shopping, shoppers in this group are more likely to make a shopping list, compare prices and go out of their way to find the stores with the lowest prices.

Indulgents (16 percent): The most impulsive group, this group is attracted to new products and is more likely to choose the good-tasting over the healthy option. They are happy to spend more to save

time and don't mind paying more for branded products.

Responsible Planners (17 percent): Shoppers in this group are also on a fixed budget (like the Price Driven shoppers) and always compare prices. They are the shoppers most likely to buy online and have changed their habits to shop in a more sustainable way.

Bargain Hunters (25 percent): Shoppers in this group also hunt for bargains but are less price-constrained and more impulsive. They can afford to buy in bulk and are less interested in shopping online.

The segments were developed based on a consumer survey conducted by Ipsos in 23 countries. The segmentation analysis revealed two important implications for CPG marketers. First, global CPG shoppers can be segmented based on their attitudes toward bargain-hunting, promotions and price comparisons and the degree to which they stick to their pre-planned purchases vs. buying on impulse. Second, country of residence is not a strong factor in trying to classify global shoppers into different segments. In fact, data suggests that consumers in different countries may exhibit similar shopping behavior even though they are geographically dispersed and at different stages of economic development.

"It's natural for marketers to try to customize their merchandising strategies to countries or geographies – there is an intuitive logic to doing that," says Donna Wydra, senior vice president, Ipsos Marketing, U.S. shopper and retail. "However, our findings demonstrate that retail strategies should align with shopping styles, which are not necessarily dictated by geography. For example, Brand Lovers dominate across China, India, Russia and Turkey – therefore,

marketers can take advantage of the opportunities that this provides as brands become more affordable in these growing economies. On the other hand, there is a need to continue to promote and meet the needs of the Bargain Hunters found in the U.S., Canada, Great Britain and Australia for whom smart shopping has become a way of life. The bottom line is that shopping strategies should align to shoppers, not countries." For more information visit www.ipsos-na.com.

Has the Great Recession sapped Americans' can-do spirit?

After two years obsessing over a bad economy and pinching pennies, there has been talk among the pundits that the worst of the Great Recession is nearly over, although Americans aren't convinced that stability is here to stay. In fact, the normally-optimistic and hope-filled American public has a dismal outlook on the future and little faith in the fundamentals of the country's economy. Almost two-thirds of Americans say a double-dip recession (defined as a recession followed by a short-lived recovery, followed by another recession) is likely to happen, according to a survey conducted by New York research company StrategyOne. Among those who expect a double-dip recession, 44 percent fear it will be worse than the first one, with 21 percent worried it will be much more severe. Twenty-four percent think the second recession will be less severe.

As they brace for a second downturn, Americans are certainly not holding their breath for a full recovery anytime soon. Just 5 percent think there will be a full economic recovery by the end of this year, and only another 21 percent see recovery taking place by the end of 2011. Half see a recovery not coming until sometime after the

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names of note

Andrew Ehrenberg, a marketing scientist and consumer loyalty specialist, died on August 25 at age 84.

Maritz Research, St. Louis, has hired **Susan Lipske** as director, strategic consulting, retail. The company has also hired **John Fricker** as account manager, financial services research group. Fricker will be based in Toronto.

Ipsos Observer, a New York research company, has made several appointments to its team. **Allison Gunn** has been promoted to senior vice president and will lead the West Coast area. She will be based in Los Angeles. **John Ward** has been appointed vice president and will lead the Central U.S. territory out of Minneapolis. **Dennis Barbelet** has been promoted to vice president, East Coast. Barbelet will be based in New York.

Menlo Park, Calif., research company *Knowledge Networks (KN)* has named **Clifton “Cliff” Botelho, Jr.**, director, KN Dimestore. Botelho will be based in New York. **Matthew Porreca** has also joined KN Dimestore as director, West Coast sales, and will be based in San Francisco.

Chicago research company *Synovate* has promoted **Enrique Domingo** to CEO of Synovate Iberia and Latin America. **Eliza Wong** has been named CEO of Synovate Greater China and **Ulf Andersen** has been promoted to CEO of Synovate’s Scandinavian business units. Additionally, **Bjørn Jacobsen** has been promoted to commercial director, Synovate Norway.

Pei Li Teh has joined *The Research Partnership*, London, as research manager. She will be based in Singapore.

Diane Parus has been named senior vice president of *Target Research Group*, Nanuet, N.Y.

New Hope, Pa., research company *Roger Green and Associates Inc.* has appointed **Eric Duncan** as associate research director; and **Caleb Costa** and **Qiang Xu** as research manager. The company has also promoted **Katie Ka** to research director; **Dan Weidner** and **Sunny Shah** to research manager; and **Alex Graber** to research analyst.



Duncan

Costa



Xu

Ka



Weidner

Shah



Graber

Kyle

Sherrelle Kyle of Farmington Hills,

Mich., research company *Morpace Inc.* has been awarded the highest level of HIPAA skills certification provided by the HIPAA Academy.

Molly Elmore has been promoted to vice president, research, at Stamford, Conn., research company *InsightExpress*.

Framingham, Mass., research company *Kadence International* has hired **Anna Parry** as senior insight executive; **Sean Ward** as research executive; and **Clare Jessett** as graduate insight executive. All three will be based in the company’s U.K. office.

New York research company *StrategyOne* has named **Jennifer Haskins** leader of its energy practice. Haskins will be based in Washington, D.C.

Vanessa Hartnoll has joined New York research company *Hall & Partners* as global head, shopper insights.

Exhibit Surveys Inc., a Red Bank, N.J., research company, has hired **Mark Suppanz** as senior project manager and **Michele Scot** as project manager.

MTV, a New York television network, has hired **Rick Bruner** as vice president, digital ad sales research; and **Stuart Schneiderman** as senior director, MTVN digital research.

ICM Research, London, has hired **Andrew Wiseman** and **James Turner** as board directors.

Craig Ryder has joined Leeds, U.K., research company *Nunwood* as global head, shopper insight, analytics and activation. Nunwood has also named **Jane Ormiston** executive vice president, North America. Ormiston will be based in Los Angeles.

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THE TUSCAN VILLA

Stylized furniture and walls with a warm color pallet are the first indicators that

you've arrived in our Continental Space. Not entirely Italian, with a hint of French, the one way mirror is the only reminder of a focus facility. *"Isn't that bronze statuary in the Louvre?"*

HAIRSpray

GOOD MORNING BALTIMORE!

Bright colors abound in this ode to the infamous John Waters. This space tops them all for bric-a-brac and has been labeled, "deliciously tacky" by one of our astute clients. *"What's old is definitely what's new."*

The Chesapeake Club

They call it "The Land of Pleasant Living!" Entering our private sportsman's club, one can't help but notice our wildlife theme. Once you finish your research, you'll be ready to plan your next vacation on Maryland's Eastern Shore.

THE METROPOLITAN ROOM

Abstract art, high gloss walls and an assortment of objets d'art will take your eye to the four

corners of each room. *"Wait a minute... did I just see Jackson Pollack? AHHH...art for art's sake!"*

POP CULTURE

A perfect storm of good old fashioned American capitalism and high intensity consumerism make for a wonderful homage to creativity. Familiar household brands combined with absolutely unique eye candy make for a "must visit" when on our campus. *"Newly improved for a brighter you."*

The Empire Salon

Even Marie Antoinette would be impressed... antique furnishings,

silk draperies, crystal chandeliers and elaborate crown moldings all in various gold tones. Did we fail to mention the fireplace in the lounge? *"Versailles in Baltimore. Imagine that!"*



Is that Sandra Bullock or Julia Roberts ... it really doesn't matter; both would feel at home. A stunning decor consisting of mocha colored wall coverings complete with mini mirrors, Art Deco lighting and leopard print carpets complete the look. *"I'm ready for my close-up Mr. de Mille!"*



Yes, that's right. You heard correctly. A focus suite with a kitchen set-up.

Observers can peer through the one way mirror into our fully functioning kitchen. Blue and white tavern checked wall covering, maple cabinetry, stainless steel appliances set the stage for some pretty creative and tasty research. *"Bon appetit Ms. Child."*

So there you have it – **8** (*yes – we said EIGHT*) wonderfully appointed and graciously styled suites for your business pleasure.

And please don't forget our 15 private "rest salons." No communal, give-me-a-key toilets for our clients. Spotless and peaceful, of course.

P.S. Chef Ryan has his legendary Imperial Crab Cakes ready for you!



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product and service update

Itracks partners to develop social media monitoring software

Saskatoon, Saskatchewan, research company Itracks has collaborated with Web application firm MutualMind, Dallas, to create social media monitoring software for the market research industry. Dubbed Itracks Social Media Monitoring, the online application is designed to capture data from sites such as Facebook, Twitter, YouTube and other social media platforms and organize the data to help users develop their research design or monitor their clients' activity. The dashboard is intended to provide an at-a-glance view of what people are discussing online and the sentiments associated with brand mentions.

Itracks Social Media Monitoring can also be used alongside online qualitative research platforms, traditional face-to-face focus groups and quantitative projects. For more information visit www.itracks.com.

Reputation management service updated to help small businesses

Chatmeter, a San Diego online measurement company, has debuted improvements to its reputation management service and has redesigned its reports. The changes are intended to help local businesses protect and build their online reputation, allowing them to use customer feedback as a sales, marketing and customer service asset. The features aim to allow local business customers to monitor online content and buzz.

Updates to the service include the ability to display the most recent customer reviews and social media mentions; provide benchmark performance against local competitors; calculate how many online customer reviews, social media mentions, Facebook postings and Twitter followers a business has; show the amount and location of one-star and five-star customers reviews; disclose third-party Web sites with inaccurate

business profile information, such as an outdated phone number or location; and compute both local search and organic search engine rankings. For more information visit www.chatmeter.com.

GMI moves mobile solution into beta testing

Global Market Insite Inc. (GMI), a Bellevue, Wash., research company, has partnered with TXT4CRM, a Dallas mobile engagement company, to offer GMI Mobile beta, a mobile market research solution with short SMS-based diary tracking, customer satisfaction, polling and purchase intent studies designed to augment traditional market research. Market researchers can choose to run traditional online studies and follow up with a subset of mobile subscribers. GMI Mobile also allows researchers to develop short stand-alone studies specifically designed for mobile phones when fast turnaround is required.

The solution combines GMI's balancing and sampling technologies with TXT4CRM's SMS/MMS platform and mobile engagement expertise. The initial launch of GMI Mobile is for the U.S. only. For more information visit www.gmi-mr.com.

Webtrends rolls out two analytics tools

Webtrends, a Portland, Ore., research company, has introduced Webtrends Ads, the next generation of Webtrends Ad Director, designed to offer marketers a data-driven solution for creating, measuring and improving performance marketing acquisition across global search networks, the Google Display Network and Facebook Ads in one tool. Webtrends Ads incorporates the campaign management platform from Marin Software, San Francisco. The solution aims to provide sophisticated algorithms; fully-integrated analytics and optimization services across multiple conversion metrics or margin-based bid goals; landing-page

optimization; and behavior-based personalization of content.

Separately, Webtrends has also made available Webtrends Analytics for Jive, an offering designed to allow organizations to understand usage by department, user, group or content; measure adoption across wikis, blogs, documents, discussions and content groups; gather detailed metrics on contribution, consumption and social actions; view content creation, views, edits and ratings by department or individual; and optimize user experience. For more information visit www.webtrends.com.

ComScore goes social; waives southeast Asia setup fee

Reston, Va., research company comScore Inc. has launched Social Analytix, a social media intelligence service for comScore clients, powered by the social media monitoring and engagement platform from Radian6, Fredericton, New Brunswick. The service aims to provide clients with detailed, real-time insights based on what consumers are saying about their brands and products on the Web. The Radian6 technology, which operates independent of the comScore global consumer panel, is designed to capture mentions across more than 150 million social media sources including blogs, discussion boards, video- and image-sharing sites and popular social networking sites.

Social Analytix is designed to enable clients to monitor consumer-generated word-of-mouth brand mentions and gauge consumer sentiment toward their brands, products and/or competitors; listen and respond to potential customer service issues as they arise; identify key social media influencers; engage with social media users and scale listening and response across their organization; and track the lifecycle of campaigns, announcements and communication efforts.

Additionally, comScore has

continued on p. 70

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News notes

Karen Forcade of **Youth Research**, St. Petersburg, Fla., was sentenced in September 2010 to eight months in prison, eight months of house arrest, three years of supervised release and a \$10,000 fine for falsifying safety tests conducted among children for cigarette lighters made or imported for sale in the U.S. from 1994 to 2005, according to the *St. Petersburg Times*.

The Market Research Society, London, has published guidelines for deliberative research to serve as an addendum to the existing guidelines for qualitative research and to address how to manage the information provided to participants in deliberative research and the responsibilities of the researcher in managing the involvement of clients and other stakeholders. For more information visit www.mrs.org.uk.

Dallas research company **e-Rewards Inc.** has consolidated its **e-Rewards Market Research** and **Research Now** brand names. The company will conduct business as Research Now, and Research Now will continue to operate the Valued Opinions panels as well as e-Rewards' Opinion Panels.

Orem, Utah, research company **Western Wats** has changed its name to **Opinionology** and launched its company Web site at www.opinionology.com.

Millward Brown, a Naperville, Ill., research company, has rebranded its global qualitative practice as **Firefly Millward Brown**. The Firefly practice includes **Greenfield Consulting Group**, **Sadek Wynberg Millward Brown** and **MFR**, among others. The company is online at www.fireflymb.com.

Acquisitions/transactions

Maritz Research has acquired research company **evolve24**. Both

firms are based in St. Louis.

Dallas research company **e-Rewards Inc.** has agreed to acquire San Francisco research company **Peanut Labs**. Under the agreement, Peanut Labs will become a wholly-owned subsidiary of e-Rewards.

London private equity firm **Next Wave Partners** has funded the merger of research consultancies **SPA**, London, and **Future Thinking**, Oxford, U.K. As part of the integration process, a single company brand will be developed with a management board comprised of SPA and Future Thinking personnel.

San Antonio marketing agency **Harte-Hanks Inc.** has acquired **Information Arts**, a High Wycombe, U.K., research company. Information Arts will operate as a business unit of Harte-Hanks.

Los Angeles research company **MarketShare Partners** has acquired **JovianDATA**, a San Jose, Calif., research company.

The Dieringer Research Group Inc. has acquired the customer base of research firm **Lein/Spiegelhoff**, which has ceased operation after 38 years of business. Both companies are based in Brookfield, Wis.

Reston, Va., research company **comScore Inc.** has acquired Amsterdam, the Netherlands, media measurement company **Nedstat** for approximately \$36.7 million. Upon the acquisition, Nedstat became a wholly-owned subsidiary of comScore.

Association/organization news

The Advertising Research Foundation, New York, has announced Engagement 3: NeuroStandards Collaboration, a

research project designed to provide transparency regarding biometric and neurological research methods. Duane Varan will lead the study.

CASRO, Port Jefferson, N.Y., has formed a social media research task force to address ethical and methodological issues developing in the wake of social media research's emergence. The force is expected to craft guidelines that may be included within The CASRO Code of Standards and Ethics.

The Southern African Marketing Research Association, Johannesburg, South Africa, has elected its 2010/2011 council, and Elsa Thirion-Venter has been named chairperson.

The University of Georgia, Athens, in conjunction with the **Marketing Research Institute International**, St. Louis, has launched Principles of Pharmaceutical Marketing Research: An Online Certificate Course, a program offered to those whose careers are focused on the pharmaceutical, bio-tech and medical device fields and are interested developing their market research skills. For more information visit www.georgiacenter.uga.edu/popmr.

Awards/rankings

EMI - Online Research Solutions, Cincinnati, and **Promedica Inc.**, a Burlingame, Calif., research company, have been named to *Inc.* magazine's 2010 Inc. 5000 list, which ranks the fastest-growing private companies the U.S. Additionally, **Optimal Strategix Group**, a Newtown, Pa., research company, has been named to the 2010 Inc. 500 list, which comprises the fastest-growing and most entrepreneurial companies in the U.S.

American Honda Motor Co., Torrance, Calif., has presented

continued on p. 72

TRANSPARENCY*

transparency  [trans-pair-uhn-see]
–noun

1. Also, transparence: the quality or state of being transparent
2. Something transparent, like glass or some translucent substance, made visible by light shining through from behind
3. As used in the humanities and in a social context more generally, implies openness, communication, and accountability

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The need for quality assurance in profession-based targeted panels

As market researchers, our clients rely on us to deliver the highest-quality research possible. Crucial to this is the sample. Powerful analytic tools and skill cannot compensate for not interviewing the correct sample of respondents. As the saying goes, garbage in, garbage out.

Hard-to-reach, low-incidence targets are often the focus of market research. These targets are costly both in terms of dollars and their impact on the direction and scope of research, e.g., sequential monadic vs. monadic, fewer cells/respondents, lower confidence, etc. More costly targeted panels claim to, and often do, offer researchers an easier way than general-population sampling to reach desired targets, particularly low-incidence targets, by providing access to large, concentrated pools

of respondents meeting specific profiles (e.g., demographics, psychographics, professions, etc.).

Targeted panels, accordingly, should yield higher incidence rates relative to a general-population recruit, resulting in quicker, more viable recruits. However, it's apparent that this may not always be the case, particularly for panels targeting respondents employed in specific professions or industries.

Our previous endeavors to tap seemingly robust niche, profession-based panels have resulted in prolonged field times and increased costs due to lower incidence rates and the need to bring in additional panel providers. In turn, these unpleasant, unexpected effects have translated into stress caused by trying to manage costs and meet deadlines. In contrast, we

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have recently found that procuring the same sample targets via general-population recruiting as well as live-stream/on-the-fly recruiting has been quicker and less costly.

The inability of profession-based targeted panels to outperform general-population sampling of similar respondents raises questions about their quality, viability and, ultimately, their research and cost value. Why should we and, by extension, our clients pay more for a research catalyst that not only fails to speed up the process but may slow it down and lead to additional costs?

A core problem with profession-based panels may be that these panels are not as robust as advertised. The current U.S. national unemployment-

snapshot

The author offers a series of validation metrics that buyers of profession-based panels can discuss with their suppliers to better gauge sample quality.

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ment rate is nearly 10 percent, which doesn't include people who've abandoned their employment search. Should we not expect the unemployment rate to have some effect on profession-based panels, particularly for industries and professions more acutely affected by the ongoing economic downturn, e.g., manufacturing, construction, etc.? This seems reasonable, despite the claims of most panel providers that they regularly re-verify their respondents' profiles. But how often and, more importantly, how recently have they been verified or updated? Within the past month? The past three months? Is profile verification mandatory? Are panel members prohibited from participating in research until they have verified or updated their profile information?

As researchers, we need to know the quality of the panels we are considering. Such information should be provided up front by the panel provider. If not, we should question our suppliers about the quality of their panels.

Simply believing that a panel's quality must be high because it comes from Supplier X is not good enough; it is a careless lapse of our responsibility as professional researchers. Ensuring the quality of the sample is one of the most basic and important things a project manager can do to turn out high-quality research.

A well-designed screener should ensure that the desired target is captured, as should an appropriate panel of respondents from which to draw. Still, when using a specialty panel, particularly a profession-based panel, it would be good to know the quality of the panel. Telling us that a panel is comprised of X number of panelists, all of whom double opted-in, only tells us that X number of respondents who at some point in time qualified for this panel agreed twice to be a member of this panel. That's great, but it does not provide any insight into its quality. Are 80 percent of panelists current, viable members? Are 60 percent? Forty percent? Such

information would help researchers make more informed decisions.

Press our vendors

Panel quantity is important, but so is its quality, with both being reasons for choosing or not choosing to use a particular panel. As researchers, we need to press our vendors for indications of sample quality. We need to know what we are buying. If we do not like a panel's quality then we should either move on to another panel or take a shot at recruiting via the general population. Why pay more (dollars and time) for unknown quality?

Panel providers could easily provide researchers with a sense of a panel's quality by providing some basic validation metrics, such as:

- the percentage of panelists who have verified or updated their profile within the past month, past three months, etc.;
- monthly dropout and new-member rates;
- panelist response rates, i.e., percentage of respondents who respond to survey invitations as well as qualify for studies targeting the particular panel;
- panelist activity rates, e.g., range and mean number of surveys panel members have completed within the past month, past three months and past six months;
- panel inactivity rate; and
- perhaps even a client rating system.

More and better information

The ongoing economic downturn with its high unemployment rate may be attenuating the benefit of profession-based panels to researchers, especially for acutely affected industries. Nevertheless, such panels are a valuable research tool, possibly even more so during this economic downturn - concentrate dollars where you have the greatest chance of success. To take advantage of the benefits of these panels, however, we need more and better information about them to gauge their value to us. A starting point would be incorporating some of the aforementioned suggestions. | Q



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Cross-cultural insights enrich the researcher as much as the research

It is an accepted belief that we can look at others – their lives and experiences – to shine a spotlight onto our own existence. This is also true in research. Working with consumer groups in a wide variety of cultures across the world has significantly fueled the understanding of many other cultures beyond the one being researched, often our own.

It was during a research project in a South African township that this concept really struck home – the intense cultural differences we have been encountering over the years of working on global qualitative projects can often converge. There are patterns that emerge and macro-trends that start to be more clearly recognized, and they can develop and spread. It

is a fascinating phenomenon and one which is worth studying more in depth.

On this particular day in South Africa we had just finished a project on developing new, affordable food and drink products for the emerging mass market. We were winding up and ready to say our goodbyes when the young people who had taken part explained they wanted to give us a gift of gratitude. A chicken was sacrificed in our honor and the chicken's blood was poured over some of their ancestors' graves before preparing and sharing the meal in our team's honor.

Stark contrast to work we undertook later that same month researching in a secondary school in the affluent village of Eton,

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near Windsor (home of the famous Windsor Castle, one of the Queen's residences). Here we worked with young people roughly the same age yet they expected far more and gave far less. In fact, we had equipment stolen from us – the first and only time we have ever had equipment stolen.

Though a strange comparison, the two experiences highlighted a common insight. We learned from the South African students how to position and drive interest in the future and the importance of connecting at a deeper level, building ritual and how to gain and keep interest to earn trust. Who would have thought that such a disparate set of circumstances could focus us in a direction to find the answer? But it did.

snapshot

Qualitative projects in disparate cultures can often inform unrelated projects, the author explains, by bringing contrasts into sharp relief and enhancing a researcher's global awareness.

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Seemingly very different instances can provide invaluable insight into cross-cultural habits. Key of course is defining which drivers are prevalent across all cultures and how these diverse cultures respond to different stimuli.

So while in Shanghai, a classroom session in learning how to make nutrition and healthful products more relevant was dynamic, with all kids vying for attention. Every question asked over the six-hour session with the kids had all kids raising their hand to provide the answer. In the Netherlands, on a similar subject, we had a much different response to our questions. Dutch children tend to be taught not to overachieve and are encouraged to hold back. The subject was virtually the same, the “way in” was clearly different. The Chinese culture allowed us to see how to address the problems with the Dutch client’s approach to their product marketing. We gave the example of the difference between Chinese and Dutch experiences, and that resonated with the European client – the resulting “aha” was the first step to amazing success.

In Australia, during a project about food and snacking, we were struck by how different these kids’ relationship with food is. Unlike their U.K. and U.S. counterparts, the Australian child deals with food choices in a broadly wholesome way. They appear to have a clear understanding

of the role of treats, perceiving them to be emotionally healthy rather than nutritionally good for them. The difference in relationship with food was more highlighted because we had a cultural comparison and this began the process of unlocking the answers to our research brief.

Yet while these types of learnings can be very distinct and different from each other, when analyzed there are common themes and threads which begin to emerge. One such theme which is becoming a global macrotrend is the desire for “real food” values to be brought back to processed food. This is demonstrated cross-culturally in many ways: the desire for organic, bio-dynamic, all-natural and even locally produced foods. There is a globally growing wish to return to the feeling of more wholesome, less contrived. Interestingly, this macrotrend is reflected not only in foods but also in other product categories. Key is the drive toward unedited, raw, unadulterated, genuine, natural – and this often goes hand-in-hand with “more ethical,” “more trustworthy.” These sentiments, of course, are propagated via rapid communications channels.

Most creative

There is also an interesting theme emerging in contrast to the intense consumer frenzy of the last decade. This is the behavior and aspirations of lower socioeconomic societies. Be they in Brazil, India or the U.S., the children that come from a low-income society, those that can’t afford to surround themselves with gizmos and “stuff,” are by far the most spontaneous and often creative children we have worked with. Their attention span is greater and their curiosity and inquisitiveness are more honed. Often they appear to have better problem-solving skills too. Whether it be lack of external distractions or merely that they don’t have a lot of expensive toys and so need to be more creative, these kids are frequently less grasping and more contented. They project a genuine aura of confidence too. Obviously this is not suggesting that lower-income should be our goal, though there is a lesson to be learned in terms of appreciating the value of

simpler things in life.

The drive for parents to get kids involved in activities is another recurrent, cross-cultural theme. This spans all socioeconomic boundaries too. Similarly there is a drive around the world to have more unstructured time, to reduce intense schedules. This is something which is prevalent in the more affluent societies where parents aspire for their kids to be involved in numerous activities. What we are starting to see is more of a desire for young people to have and enjoy free, unstructured time where they can enjoy a break from the busy-ness and routine.

The cross-cultural picture would not be complete without talking about the effect technology has had on today’s youth. This too is (of course) a global trend – you can see it evident everywhere. Our children are the very first generation to have grown up with connectivity at their fingertips. They expect it. In fact in our research we have found kids from all backgrounds and numerous countries claiming that they would feel quite paralyzed and disconnected if they could not keep in touch with their myriad of virtual friends. The flip side to this however is that this sense of connectivity which technology offers them has left them craving for genuine connections – the real thing. Technology can’t replace a proper, face-to-face, human relationship. There is in effect a sense of void emerging. Kids are looking for bigger thrills, more exciting experiences and new ways of connecting.

Unexpected insight

So what does this tell us? Certainly it is at least interesting to see what goes on elsewhere, but I propose that it can bring new, renewed or even completely unexpected insight. When my partner and I formed our research company, we were advised to focus on one market. I am glad that we didn’t listen to that advice. The global experiences have allowed us to see what is human truth and indeed what is a cultural truth. Knowing the difference has helped immensely in delivering successful projects and uncovering fascinating, enriching findings. | Q

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A rapid-response consumer segmentation survey approach

Marketing research has been described by many practitioners as a business where “The urgent drives out the important.” Many brand managers feel extreme time and budget pressures when making decisions about promotion campaigns for target markets and providing segment profiles to both ad agencies and upper management. This situation leads to a need for rapid-response data collection methods.

Increasingly, marketing research professionals have turned to multiple sample frames to obtain consumers in short-timeline projects. Surveys that used to take a month to deliver results now are expected in half the time or less and always at lower costs. Multiple-sample-frame surveys provide

broader access to highly specialized or target consumers in simultaneous field periods meeting rapid response requirements.

Recently, panels and proprietary databases have been used to complete rapid-response surveys. Consumer panels have become available for both Web and phone surveys provided by companies such as National Family Opinion (NFO) and Greenfield Online. These panels are composed of specific consumers who have agreed to participate in surveys at certain times over an extended time period. In addition to panels, product category-specific databases have been built by companies for their own use through toll-free numbers attached to consumer

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relationship management (CRM) programs; business reply cards from magazines; journal advertising; product Web site registration information; surveys; and a variety of other sources. This trend is reflected in reports of increased use of client-supplied samples and panel samples supplied by marketing research companies doing field work for consumer surveys.

In tracking the use of multiple sample-frame-surveys from 2004 to 2007 (Macer and Wilson, 2008), research has shown a high use of client-supplied (77 percent), and third-party or access panels (74 percent) as sources

snapshot

This article provides a real-world example of consumer segmentation data collected using a multiple-sample-frame survey approach. The use of two sample frames reduced the field time, provided lower costs and added value in getting the right people for segmentation while meeting rapid-response requirements.

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of samples for multiple-sample-frame surveys. These high utilization rates are taken to indicate consumer research is an important use of panels and client databases for marketing research surveys, with access panels showing the greatest increase in utilization (+18 percent) over the four-year period. The present survey involved these two types of sample frames (client and access panels) in a rapid-response consumer segmentation study.

Better address the issues

The company commissioning this study has been serving the consumer market with a “gold standard” product since 1978. During that time many marketing research studies had been undertaken involving consumers in this market, but no research study had focused on segmenting the market. The company now wanted to better address social and psychological issues unique to the target market, and needed to do so quickly to inform the strategic marketing plan for the next year.

The overall client goals of this study were to understand consumer needs, information requirements, concerns and problems and to provide the company with publishable results. More specifically, the objectives of this research were to determine consumers’ current

Table 1: Overall Performance of the NFO-CAP and 800 # Sample Frames

Performance Measure	NFO-CAP	Client 800 #	Total
Total Completions	354	150	504
Total Disqualifications	145	174	319
Total Contacts	554	424	978
Total Dials	1,269	1,092	2,361

knowledge of and attitudes toward their problems; to gain greater insight into common concerns or problems of the target market; to identify concerns and misunderstandings concerning the company’s product; and to identify methods and resources favored for communication by the target market.

Method

In order to meet the objectives of this research, a division of National Family Opinion was commissioned to conduct a two-phased study. The qualitative stage consisted of five focus groups to define the survey instrument. For the quantitative portion, a survey was conducted among a national sample of 504 consumers. Results of Phase I (qualitative focus groups) research were utilized to structure content areas for quantification.

The quantitative consumer sample was drawn from two frames: a proprietary toll-free call-in service database of 1,913 consumers maintained by the

company and a 2,208-member NFO consumer access panel.

Consumers represent a random mix from the above databases. Computer-assisted telephone interviewing was used to collect data from consumers in this survey. Each interview lasted approximately 25-30 minutes and each consumer received an honorarium for cooperation.

Results

Sample demographics

Because of the nature of the client’s marketing interest, all consumers were women and approximately 60 percent of the sample is between 60 and 75 years of age. Half of the consumers have a high-school education or less. Six in 10 are married; about one in four are widowed. The bulk of these consumers have incomes below \$40,000. Four in 10 have incomes less than \$20,000 while a similar number have incomes of \$20,000 to \$40,000. Ethnically, the consumers in this sample are primarily Caucasian (91 percent). The minority population is somewhat underrepresented by African-Americans (4 percent) and Native Americans (4 percent). Consumers cut across various residential settings. Slightly over four in 10 live in the suburbs, one-third live in urban areas while about one-fourth classifies their area as rural.

Survey performance measures

The four standard performance measures of survey sampling appear in Table 1. As can be seen from the data in the table, the NFO Consumer Access Panel (NFO-CAP) was more efficient in converting dials into contacts (44 percent vs. 39 percent) and converting contacts into completions (64 percent vs. 35 percent) compared to the company toll-free number.

Figure 1 presents the cumulative completes for the individual sample

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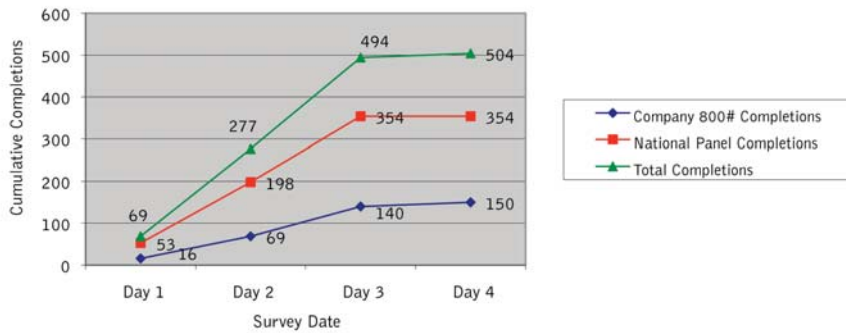
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Figure 1: Cumulative Completions for Two Sample Frames



frames and the total sample. As can be seen in the rapid growth of completes, the survey was finished in four days, and could have been cut off at three days with no loss of precision.

Discussion

Academics and practitioners alike are concerned about consumer origin and its relationship to results from a survey. For example, it has been argued (Krosnick, 1999), that survey research methods need a change in standard operating practices such as systematic, representative sampling and high response rates with post-survey weighting used to maximize representativeness. It would be nice if clients would pay for such insurances of data quality. But that kind expenditure only comes with government contracts.

On the practitioner side, as noted by Nelems (2007), the data could be weighted to reflect any differences in the two sample frame profiles, but typically in samples of this size it does not make a meaningful difference in conclusions one might draw from the results of the main measures. In addition, the chief statistician at Knowledge Networks argues that survey researchers need to be clear about the nature of the access panel used for sampling (DiSogra, 2008).

The differences in sample performance between volunteer access panels (VAPs) and non-volunteer access panels (NVAPs) are real and important according to this argument. Clearly, the sample performance reported here indicates the NFO-CAP (NVAP) sample frame was somewhat better than the company toll-free number (VAP) sample frame in efficiency of contacts and conversion to completions. But, survey

methodologists, clients are only interested in the final combined results.

The director of respondent cooperation at the Council for Marketing and Opinion Research (CMOR) has argued that sample quality issues related to consumer cooperation, consumer engagement, consumer coverage and presence of professional and fraudulent consumer survey participants are all connected to the origins of the consumers in a sample frame (Glazer, 2008). Consistent with CMOR, practitioners of marketing research strive to meet the new standards of operation adopted by the research industry including:

- improving the representativeness of access panel samples;
- decreasing the field time for a survey;

- lowering the costs of research to deliver higher value;
- being concerned with and protective of privacy of access panel members; and
- complying with any privacy legislation.

In the context of the sample performance reported here, these concerns seem to be more intense for the company toll-free number sample frame than the NFO-CAP sample frame. However, use of both sample frames yielded a field period of only four days, leveraged the company sample frame in providing lower costs and added value in meeting rapid response requirements by getting the right people for segmentation as the client requested. | Q

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10 questions to ask before choosing a sample provider

Take these steps to build your research on a solid foundation

Solid market research is the foundation of every business's most critical decisions – and the quality of that research depends on the quality of the sample. A representative, valid, unbiased sample is essential for research results to provide accurate reflections of the market – and reliable

guidance for business direction. A host of factors, however, from the explosion of the Internet to the fragmentation of media usage to the rise of social networks, has made it increasingly difficult to attract the right participants and create the optimal sample.

Even traditional RDD (random-digit dialing) landline phone sample – long considered the most methodologically-sound for survey research – is coming into question with the rise of mobile phone usage. The latest National Health Interview Survey shows that 51 percent of U.S. homes are now cell-only or cell-primary households – making them hard or even impossible to reach through traditional RDD. The growth of wireless is not

just a U.S. phenomenon. Research by our firm shows that around the world – from the U.K. to Spain to Japan – more people now own cell phones than landlines, and that gap is largest among 18-24-year-olds.

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snapshot

Beyond getting the right sample, researchers conducting online surveys face a host of obstacles, from harder-to-reach consumers to the speeders and cheaters who lurk among the pool of willing respondents. Here are 10 topics to cover with your sample provider to help improve your odds.

The challenges can be just as great, if not greater, in the online world. The traditional paradigm for online research has been sending e-mail invitations to potential participants. But that paradigm is no longer enough to sustain research into the future. Since 2003, e-mail use for personal messages has plummeted 41 percent, according to the Online Publishers Association. Although 90 trillion e-mails were sent over the last year, 81 percent were spam. It is harder than ever to get participants' attention when their inboxes are overflowing with junk mail.

But the decline in e-mail is just one of many changes transforming how researchers need to reach and communicate with participants. Participants now can take surveys anywhere, on a plethora of devices and often while doing other tasks. In fact, our research shows that consumers worldwide now media multitask

regularly, often texting, chatting on the phone and surfing the Web all at the same time.

In this new world, technology has given birth to a wide range of new sampling options and sources – as well as new threats to data quality and integrity. To be sure market researchers get sample they can count on to drive the right business decisions, they need to ask questions – and, more importantly, demand answers – different than in the past. Understanding the responses to the following 10 questions can ensure that researchers make the right sample choice for their projects.

1. How are reach and diversity achieved?

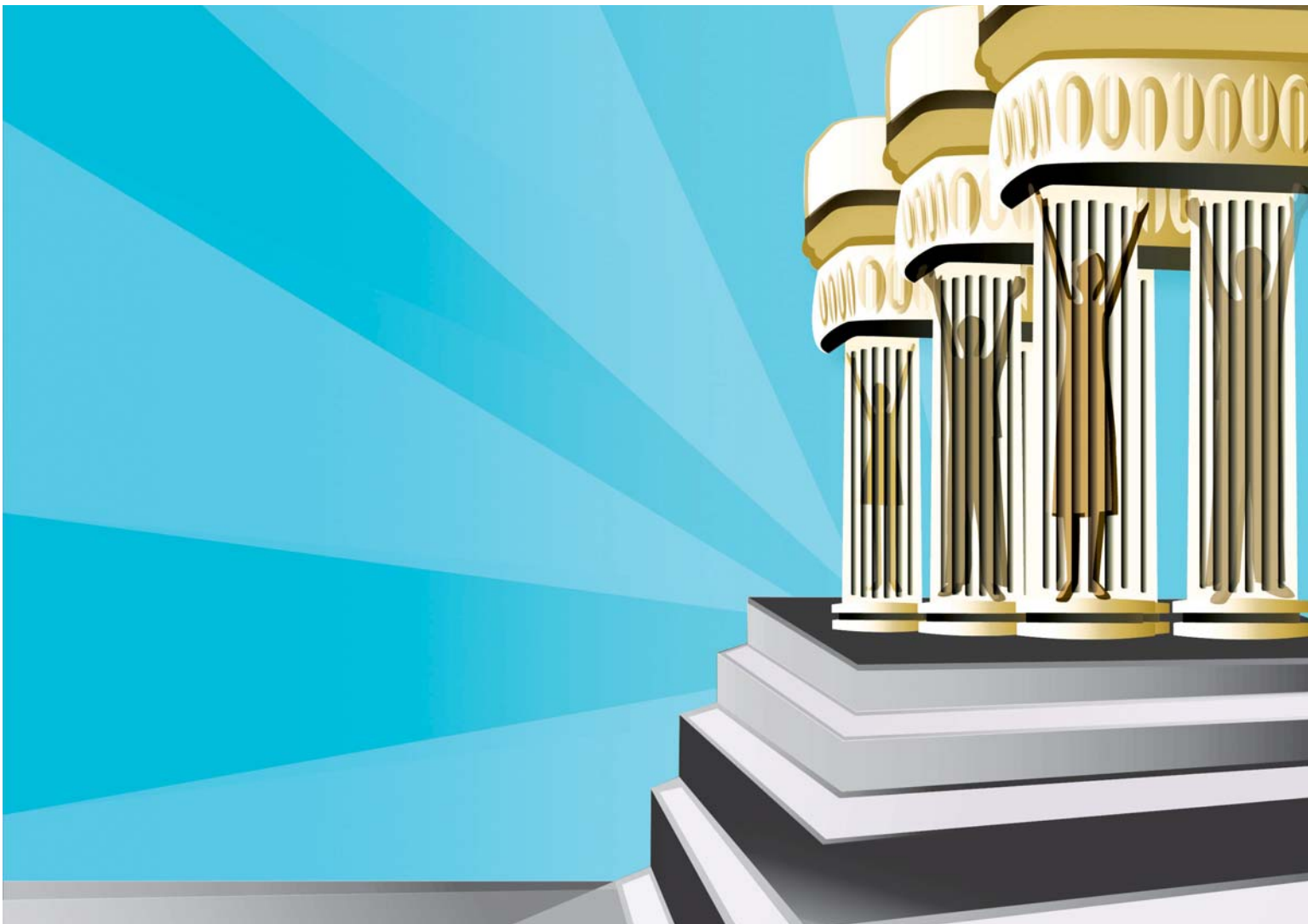
The reality is that only a finite number of people will ever join a panel. Although panels always will remain a critical part of the access

mix, it is increasingly difficult to deliver all the participants needed for a survey from panels alone – particularly when looking for hard-to-reach targets. In fact, in today's world, no one source can deliver the reach and diversity critical to unbiased sample.

The optimal sample taps into a variety of sources – traditional panels as well as social media, online communities, affiliate partners, reward programs, shopping portals and more – to provide true reach and diversity. In our multimedia, multitasking world, it is important to engage people wherever they are – and to include all participants, even those who would never be part of a managed panel.

2. How are multiple sources blended?

Blending sample from multiple sources lets researchers reach all



people who want to share their opinions – even those not on panels – maximizing diversity, the most important characteristic of a representative sample. Blending also creates a better sample by improving coverage and ensuring that the opportunity to take surveys is placed in front of as large and varied a population as possible. Blending, therefore, actually can result in a better-quality sample than using any one source alone – that is, when it's done right.

When choosing a sample provider, confirm there are quality controls in place, such as digital fingerprinting to avoid duplication. Plus, verify that blended sample is regularly checked to reflect changes in source composition and market dynamics. It is also important to ensure the provider considers a full range of factors by retesting in a multisource environment to ensure balanced sample, adding calibration questions to surveys to help explain differences and employing smoothing techniques.

3. What is the recruitment approach?

In today's sampling world, variety and flexibility are key. Diverse sourcing – critical to unbiased sample – demands eclectic recruiting. Effective sample providers use a variety of recruitment methods to drive traffic to surveys, rather than, for example, bombarding people with pop-up ads. By matching recruitment methods to partner sources and their membership, sample providers can both increase participation and improve the participant experience.

4. How are participants treated?

People are vastly different in what motivates and engages them. Even more importantly, when they feel they are being treated fairly and their efforts are appreciated, they provide better data. That's why your sample provider should nurture participants. Effective sample providers treat their participants like their clients. They make expectations clear, answer questions quickly and offer reward systems as varied as their sources, with options ranging from point systems to sweepstakes to charitable donations to information to sincere thanks. Fully

customizing rewards ensures sample providers successfully motivate each target audience.

5. How is the participant experience managed?

In a world where there is constant competition for participants' attention, it is more critical than ever that we create survey experiences that are positive and engaging. One of the biggest obstacles to participant satisfaction – and the largest sources of participant fatigue and frustration – is being screened-out from surveys.

Screen-outs happen when participants are ready and willing to share their opinions – but just at the moment they want to participate, they are told they don't qualify. Screen-outs happen when sample providers screen participants for one survey at a time. Many people seeking to participate will not meet the criteria for an individual project – and will find themselves shut out of the process.

To avoid that negative experience, it's important to seek sample providers who offer participants many projects for which they could qualify, screening for multiple studies at once and thus greatly increasing the chances that people who want to complete a survey will have that opportunity. This approach reduces screen-outs, increases participant satisfaction, slashes the number of e-mail invitations and cuts drop-out rates.

6. What processes are in place for identifying speeders and cheaters?

Technology has created new ways for people who want to game the system. Fortunately, it also has enabled the creation of powerful tools to protect against this type of fraudulent activity. Research shows a very small number of participants intentionally try to cheat on surveys. Nevertheless, it is critical that sample providers have proven techniques in place to prevent any type of fraud that would compromise data integrity. Among the tools and processes you should ensure sample providers are implementing to protect quality include:

- Timestamps to flag participants who have completed a survey – or a portion of a survey – too

quickly to have provided relevant responses.

- Checks to identify straightliners – participants whose answers remain static across a survey (all As, for example) or the same pattern of response (such as ABCABC, etc.).
- Quality-control questions to catch participants who are not paying attention, are inconsistent in their demographic information or are not following instructions.
- Matches against third-party consumer databases to confirm each panelist's name, address and date of birth, making sure all participants are who they say they are.
- Database analyses to identify and remove fraudsters in real time. People trying to complete surveys fraudulently – using false identities and providing answers just to collect rewards – exhibit common behavior patterns, such as very fast survey completion times and out-of-area IP addresses. They also tend to use their varied identities in a consistent pattern across surveys, as well as to qualify for surveys with very different target audiences. As a result, it is critical sample providers have tools in place that identify these behavior patterns so can eliminate fraudulent responders.

7. How are participants validated and de-duped?

In today's world, where survey participants come from multiple sources, it is possible for people to be invited more than once to the same survey. Therefore, often unintentionally, a person may try to respond twice to the same questionnaire. For quality data, it is essential that sample providers have controls in place to protect against duplicate participants.

Digital fingerprinting is one tool that is critical for preventing duplication. Digital fingerprinting identifies each participant's machine. This is done through watermarking (a sophisticated type of cookie that cannot be easily removed) or through tracking multiple data points (such as system time, screen resolution and software versions). When a person logs on to take a survey, the machine's ID is screened

against all those already on file. If a duplicate is found, the participant is not able to take the survey.

In addition sample providers should use a variety of techniques to authenticate participants. These can include traps to identify geo-IP violations, address matching (such as, in the U.S., matches against the USPS postal file) and profile-specific queries that only the legitimate participant would know how to answer.

8. How are Web partners chosen?

With multisource sampling, providers integrate information from many Web partners to create a balanced sample. When choosing a sampling vendor, make sure it shares its process for ensuring each partner provides quality sample. Reliable sample providers have a consistent set of standards they apply to evaluate sources before incorporating them. They should fully vet each source to confirm it provides a positive participant experience and contributes to providing a fully representative sample.

9. What modes of access are available?

With all of today's communication options, the people needed to complete a research project can be tougher than ever to reach. They may be online or offline, wired or wireless, Internet-savvy or Web-averse. Therefore, depending on only one mode to fill sample may mean missing out on a critical segment of the universe.

Our multimedia world demands multimode sampling - particularly for lower-incidence targets. Ask if sample providers under consideration can offer access through a range of online and offline modes, as well as through mixed-access approaches. This is particularly critical for projects with small universes, narrow parameters or hard-to-reach audiences.

10. How is science applied to ensure representative, balanced samples?

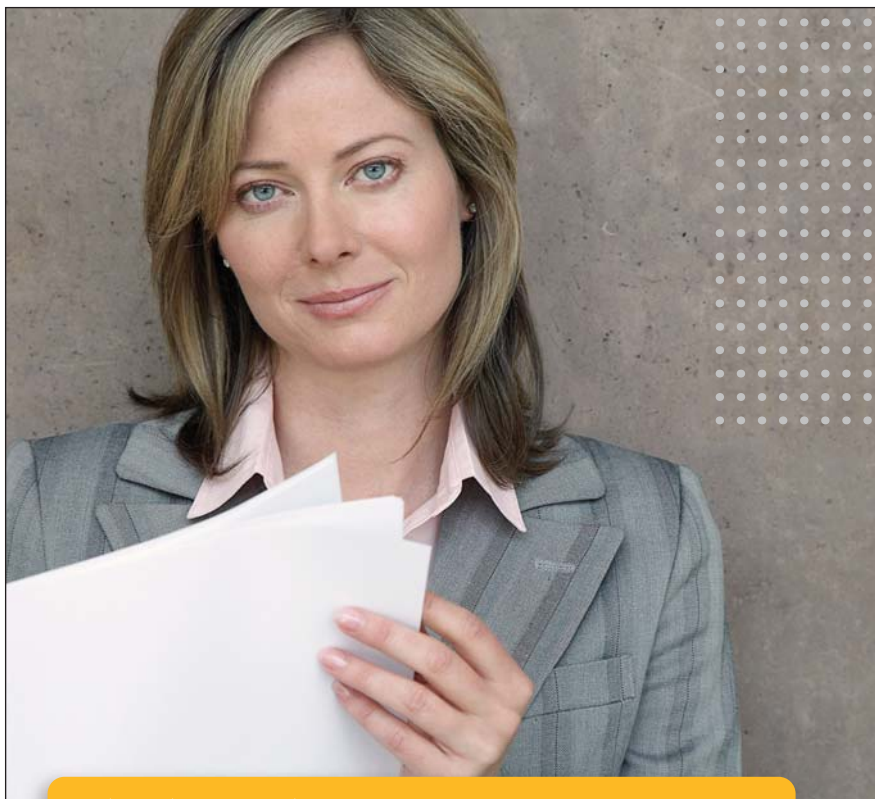
Sampling is not just about filling quotas. If the sample is not balanced, unbiased and representative, the information it delivers can be inaccurate

- and misleading. Make sure vendors can provide methodologically-sound sample plans before beginning a job. Plans should include solid selection techniques; detailed stratification and targeting; precise geographic and demographic allocations; rewards that motivate; appropriate contact methods; and active panel and community management programs.

Take the time to ask

A solid sample is a critical founda-

tion for effective research. With so many forces converging to transform how people seek and share information, it is important to evaluate sample providers against new standards - ensuring they can deliver quality sample in our new world. Take the time to ask sample providers the right questions - and demand complete answers. Ensuring quality sample is essential to ensuring effective research results that guide accurate business decisions. | Q



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Keep your house in order

Building house panels to the highest quality standards

Market researchers often complain about the quality of online panels, whose problems have been well documented by the American Association for Public Opinion Researchers, the Advertising Research Foundation, ESOMAR and other industry groups. They are unrepresentative of consumers in general, often produce dramatically different results at different times and suffer from respondents who speed through surveys or even lie when answering questions.

Just as important, but much less talked about, is the quality of house panels.

House panels? A house panel is a centralized resource, built on the foundation of customer lists but maintained specifically for the purpose of conducting survey research. Panel data can be maintained manually, through custom databases or through panel-management applications.

Since proprietary panels are built for internal use, they are not subject to the scrutiny that comes when an access panel markets and sells its capabilities. For instance, the team managing a house panel never publishes the answers to the ESOMAR 26, which is a staple of commercial panels, addressing the 26 questions buyers should ask panel providers during the sales process. This lack of outside scrutiny is typically not replaced by a layer of inside scrutiny either. Often, organizations haven't even documented their own practices for new members of their team. Firms are often unaware that they are making mistakes in the construction and management of their panel until after they have been caught unaware by them.

For instance, one firm conducted a major account satisfaction survey and was shocked to find that not a single customer in the

Pacific Northwest had answered its survey. It turned out that no customers from the Pacific Northwest had been invited, as they had all been invited to take a different survey the week before. Obsessive enforcement of invitation limits led to skewed results.

Teams managing house panels often approach the panel in an ad hoc way, rather than with a documented panel-management plan. A good plan can help identify some of the challenges that can be easily addressed with the right approach. Other challenges require making difficult trade-offs, such as whether

snapshot

House panels demand the same kind of best practices that are often applied to online or other types of panels. Companies that fail to monitor the use and health of their house panels risk squandering a valuable resource and alienating core customers.



By Jeffrey Henning

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EXPLORING THE UNREACHABLE



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a panel should be built to be representative or not.

Here are some of the best practices an organization should consider as it seeks to gather the highest quality survey data from a house panel.

Not having a panel

The biggest mistake, for many, is not having a panel in the first place. Many organizations, whether they do one or a hundred customer surveys a year, pull a customer list for each survey. They have their IT, sales or marketing departments create the list from an internal database, sometimes selecting everybody, sometimes selecting customers with a specific profile of buying behavior or demographics; whatever the current survey needs.

These customer lists are not a house panel.

When no one in an organization is responsible for survey data, everybody collects it. Survey tools provide for gathering customer feedback but not for organizing it. Most large organizations today have dozens or even hundreds of separate accounts with survey tools. Employees conduct online surveys to solicit the information they need to answer specific questions. In the process, they degrade the research process. Response rates decline, as too many individuals send out too many survey invitations. Respondents are confused, as questionnaires are published with leading questions and ambiguous lists of choices. It's easy for do-it-yourself researchers to collect data poorly, leading the business to the wrong conclusions and the wrong decisions.

Panel management is the recognition that customer feedback is an asset and should be treated as such. In order to preserve customers' willingness to respond to surveys, organizations need to control and conserve access to those customers for survey research. Too often, organizations survey all or most of their customers rather than a random sample, which – at the cost of modestly lower statistical validity – enables many more surveys to run in parallel. Good panel management practices treat survey respondents as an ecosystem and make sure not to hunt respondents to extinction.

Once an organization has built a

panel, it needs to work hard to avoid mistakes and follow best practices that will facilitate success.

Align your design

Align your panel design with the types of decisions you will make and the reliability you need. If you need to estimate the percentage of your customers with certain attitudes or propensities to purchase, then every customer should have a random and equal chance of being invited to surveys. If you are more interested in qualitative insights (directional but not projectable), you can take a more ad hoc approach to recruiting panelists and worry less about a structured approach to your panel research.

How hard or easy it is to build a representative panel depends in part on the nature of your business. This is easy for companies with a known and documented customer base, such as e-commerce businesses and B2B firms with large accounts. It is hard for retailers. And it is practically impossible for manufacturers and others who sell indirectly.

If a representative panel of all customers is impossible, consider building a panel of loyal customers instead. For a retailer, rather than creating a panel to represent the average customer, work with your brand's loyalty program to create a panel of those customers.

If your only relationship with customers is through warranty cards and calls to your customer service center, forget trying to build a representative panel. Use the panel for general insights and for gathering rich qualitative information. The good news for a qualitative panel is that you can be creative about promoting it: you can use corporate Web sites for recruitment, run banner ads across your organization's sites marketing the panel and include promotional materials for the panel with your online and offline communications to customers.

When your goal is building a representative panel of your customers, you need to zealously guard that representativeness. Don't consider creating the panel as a "set and forget" exercise. Add new customers to the panel on a regular basis; where possible, create automatic synchronization

routines between your customer relationship management (CRM) system and your panel management system. Monitor unsubscribes to make sure one type of customer isn't leaving in disproportionate numbers, thereby decreasing panel representativity; run periodic profile reports on remaining panelists and compare to your CRM data. Finally, take care when enforcing exclusion rules (where you limit participation based on how recently the panelist was invited to a prior survey). If an earlier survey was to a specific subsegment, then enforcing exclusion rules will keep that subsegment from participating in the current survey, giving you an unrepresentative sample.

Incentive program

Many times when companies are building a new panel they are convinced that they must offer an incentive program. After all, they are creating the panel because of the decline in response that they have witnessed in recent surveys. They hope an incentive system will bribe customers to respond.

The trade-off is that incentive systems can corrupt data quality. An incentive system that is too generous will encourage fraudulent behavior on the part of consumers. We've seen rich incentive offers get repeated on coupon and discount blogs (which have become increasingly popular during the Great Recession), leading to an influx of survey participants from outside the panel. As a best practice, send each panelist a unique link to prevent subsequent survey completes. Commercial online access panels are in a constant balancing act of offering incentives rich enough to entice people to join the panel but not so rich as to encourage cheating and fraudulent responses.

While attractive incentive systems are necessary for general-purpose panels, where the panel has no pre-existing relationship with the panelists, financial incentives should not be necessary when researching customers. Customers agree to take surveys out of social norms rather than market norms: they recognize they have a relationship with your firm, however tenuous, and provide you feedback based on that relationship.

Accordingly, instead of promising rewards for future behavior, provide awards to recognize past survey-taking behavior. Perhaps your marketing department has leftover items from lapsed campaigns: T-shirts, mugs, pens and so forth. While modest, these things can be used to show that you appreciate respondents' time.

Try to build a panel without incentives first and see if you can get the response rate back up through better surveys sent to each customer less often. If that does not work, then add an incentive system. It's hard to switch from an incentive-based panel system to one without incentives, but easy to add incentives. When you first add incentives, focus on small tokens of appreciation rather than major financial rewards to a few winners – it avoids regulatory and compliance headaches that will drive your legal department crazy.

These are real people

Many researchers started doing surveys of the general public, of consumers in general, or of other companies' customers. With this background, it's easy to think of respondents in the abstract, as an unlimited resource, and not really worry about how tedious a survey you are subjecting them to.

It's a mistake to treat surveys of customers the same way. Few firms approach the survey research as another way customers experience the brand, but panel managers certainly should. These are real people, who do business with your firm and they need to be treated as customers. At a minimum, the survey should use a template created by marketing to showcase brand logos, colors and imagery. Even better if the language of the questions themselves reflects the customer experience brand. For instance, Domino's asks in a follow-up survey, "We want your ordering experience to rock. How was it?"

Besides showcasing the brand, customer surveys should place a higher value on customers' time than is generally given to respondents' time. Keep the questionnaire as short as possible. A key way that panel management can assist this is to embed information about the customer into the survey: facts from

each panelist's profile can be used to drive skip patterns and branches. The IT department can integrate CRM with the panel profiles: professionals can then easily target groups of customers for particular surveys and customers themselves see shorter questionnaires, with information they have already provided the organization embedded behind the scenes.

Failing to track the health

Another common mistake is failing to track the health of the panel. The fundamental measure to focus on is tracking the rate at which panelists unsubscribe from the panel. High attrition diminishes the representativeness of the panel and is a sign that you are inviting members to surveys too often and typically to surveys that are tedious.

Another key measure to track over time is the participation rate to surveys. What percent of panelists invited to take a survey actually start the survey? Work to keep that percent steady or even increasing over time. When it starts to decrease, it is

an early indicator that you are surveying too often.

Approach the panel as if it were a pond or lake that you didn't want to overfish. Few managers of house panels centrally coordinate research plans, looking at what surveys will be fielded to the panel on a month-by-month basis. Prepare a calendar of scheduled surveys, with the specific groups that you are targeting. Try to build a calendar that will keep panelists from being invited to more than one or two surveys per month. Invite panelists too frequently and they will stop reading your survey invites.

Easy to make mistakes

Because management of house panels is new to most firms, it can be easy to make mistakes that will compromise data quality. Panel quality is no longer just an issue for commercial vendors to worry about. By following panel-management best practices, however, proprietary panels can help organizations gather customer feedback more rapidly and more economically. | Q

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Hit 'em where they surf

Panel management in a mixed-mode (Web/mobile) research world

Our firm coined the term Thumbpower to refer to the increasingly adept and rapid utilization of our opposing digits to type, text, check e-mail, surf the Internet and conduct the myriad transactions that are increasingly migrating to mobile devices. Recent press has played up a Morgan Stanley report predicting that within five years “more users will connect to the Internet over mobile devices than desktop PCs.” The growth in smartphones – now used by nearly one-fourth of the U.S. mobile subscriber population – shows a rapid shift even while in a down economy, so this vision seems realistic.

What are the implications for the market research industry? From the online data collection perspective, discussions have focused upon the user experience of a mobile survey. From a panel perspective, attention has focused upon the challenges of projecting results from a population that uses their mobile devices for survey-taking. It is time to think about the mobile experience in full circle, from the respondent perspective, for control is only an illusion, and in terms of determining the mode of data collection online panelists will choose, the illusion is already a thin one.

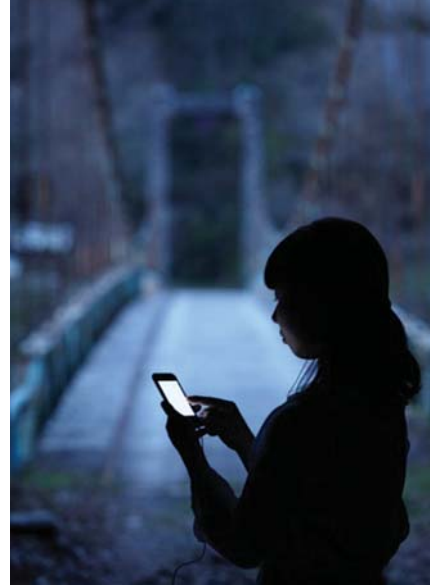
Will be incomplete

The “full circle” mobile experience includes the survey, the panel, the community and social media. The mobile survey experience will be incomplete if it consists only of respondents taking surveys on mobile devices, with researchers and panel partners determining who should be invited to take mobile surveys. In a typical panel situation, the experience must be one that is the choice of the respondent. In fact, it already is, because the respondent determines where they receive their e-mail. The issue for researchers is whether (and when) the non-response bias from individuals attempting to use a mobile device becomes an untenable issue.

As a vendor of online survey and panel management solutions, our firm has a great deal of meta-data drawn from historical surveys that is available for traffic planning and respondent verification. In a random audit of our own traffic, we found that 2 percent of respondents entering Web surveys entered using a mobile device during the past 12 months. These individuals were almost certainly recruited from the Web when they were on a traditional

snapshot

The author outlines several challenges facing users of research panels as more and more respondents access the Web via smartphone, including which devices to support, how to design profilers and which mode to use for invitations.



By Leslie Townsend

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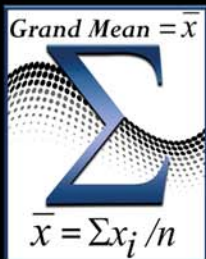


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PC since the vast majority of them came into the survey from an invitation sent by a public access panel.

In order to have a complete mobile experience, the survey respondent must be able to replicate the Web experience as much as possible. This includes:

- being returned/redirected to the mobile Web site that they came from - if they saw the invitation link while browsing a mobile site;
- being able to check and redeem their incentives from a mobile portal - if they came from a panel;
- being able to enter communities and engage with social media on either device.

To prevent non-response bias, it may also be necessary to recruit some panelists who are mobile-centric (panelists who do not necessarily originate from a traditional Web source because they are more likely to be using their mobile device than a computer). They might originate instead from a mobile site, a social networking site, or

another source - which are themselves gradually morphing. For this reason, a panelist portal needs to offer respondents a stimulating mobile experience - registration with double opt-in, ability to retrieve lost passwords, the ability to check and redeem incentives and other components that they are accustomed to on the panelist Web site or on their community site. This may create some challenges in authenticating panelists who might have been recruited in one mode versus another - a single authentication process is highly desirable.

Several challenges

All of this creates several challenges for the market research world, which must leave behind the notion of creating an identical user experience for all.

It creates greater complexity in optimizing the Web site experience for panelists. While a mobile portal for panelists does not necessarily need to offer the full functionality of a Web portal, panelists who use both Web and mobile sites are likely to

find the mobile site disappointing if it is incomplete in providing a feature that they use frequently.

It adds to programming and testing complexities, as well as development time - and hence has cost implications at a time when most researchers are looking for ways to reduce data collection expenses.

Lengthy profilers may pose a challenge for mobile survey-takers. While the industry trend has been to use multiple, relatively short profilers to keep new panelists engaged, there may be a need to redesign and simplify even further.

If profilers have been designed to be engaging - which often entails the use of interactive question types - they must be redesigned for mobile devices. Most mobile devices will not support Flash, JavaScript or even table structures.

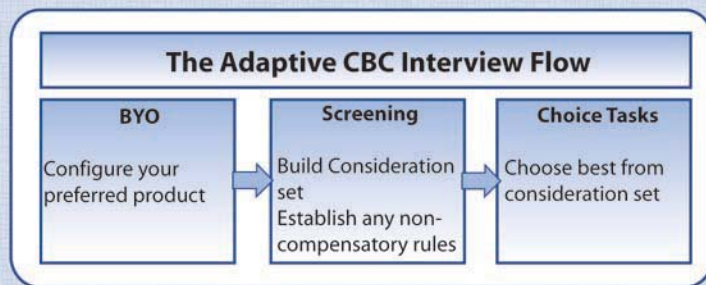
A basic decision must be made regarding what types of devices will be supported, and what exactly "support" consists of. Netbooks, gaming devices and televisions are all utilized for Web access, thus the same arguments for supporting mobile devices must be extended to these devices as well.

There is no doubt that the experience of smartphone users is a much richer one than those using older devices based upon Wireless Markup Language, and the vast majority of respondents surfing the Web are utilizing smartphones. So while Kinesis supports devices of all capabilities for survey-taking, most of our clients have decided to optimize their panelist Web sites and mobile surveys for smartphones rather than all mobile devices - since these represent the preponderance of mobile browsers. This means, as an example, that a registration form can include multiple fields on a single page, and a smartphone user can utilize their touchscreen to navigate from field to field, which is significantly preferable to using navigational keys.

There may be projects that simply do not render at all to the vast majority of mobile devices. A highly qualitative project requiring large amounts of text input is one example. A card-sorting exercise might be another. Therefore, it is

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both desirable and necessary, at least in the short term, to restrict mobile respondents from entering some surveys and/or survey exercises. This can be achieved in a variety of ways, with the preferred method being automated device detection for incoming respondents.

Invitation modes will need to be reexamined. If SMS is included into the invitation mix, per-messaging fees apply and it will become far more critical to optimize and route panelists appropriately to more closely target quotas. It is much more important to optimize sending times for text messages than e-mail since most phones have an audible alert when the messages arrive.

Mobile recruitment modes

One can take this exercise further. To truly reduce non-response bias from mobile-centric respondents, the panel must also include mobile recruitment modes. This may entail extension of river streaming techniques to mobile Web sites and social media sites, which then entails

a change in recruitment strategy, potentially to include downloadable applications (these apps can bias the panel because demographics of phone ownership vary significantly from OS to OS). But undoubtedly surveys may need to interact with mobile applications, gathering data from them, becoming embedded in them and sometimes becoming the app.

This migration is taking place much more rapidly than one might think. The efforts of Paradigm Sample, Port Washington, N.Y., are a prime example of the recent trend in moving towards a dual-mode (Web and wireless) panel. Paradigm acquired one of the first dedicated smartphone panels in the U.S. with its recent integration of Data Innovation Inc.'s panel assets. What made Data Innovation unique was that members of its panel participated exclusively through their smartphone devices - accessing a mobile panelist Web site to register, update account info, take available surveys, etc. While Paradigm clearly sees potential in continuing to market

these smartphone panelists, the same technology has allowed it to better communicate with its traditionally Web based panel. Now any of Paradigm's IdeaShifters panelists can access either a mobile Web or standard Web portal to participate in the panel. The panelist experience is almost identical, allowing Paradigm to stay connected with its members throughout the day while capturing data closer to the point of impact. Kinesis envisions this continuing as the mobile browsing experience merges more closely with that of traditional Web.

New data

Emerging from all of this comes new data that the market research industry will devour: location-based information, arising from the point of purchase and consumption and potentially linked back to panelist profile and survey data in real time - all via the rapidly expanding emersion of mobile technologies in our daily life. And that ought to create a lot more Thumbpower in motion. | Q



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Growing pains?

Thoughts on the rise and future of online research

Since the late '90s the market research landscape has been transforming. Like so many other industries, the rise of the Internet has had a massive impact on the industry. Client pressure for increased value from their research partners, falling levels of telephone response rates, rising costs of face-to-face interviewers, diminishing fixed-line telephone installations and do-not-call registries are all conspiring to drive research to the Internet and pre-opted-in research.

According to the latest estimates from ESOMAR, quantitative research methods account for 80 percent of global research spend, and 20 percent of research is now carried out online. In most developed markets it is substantially cheaper to use online data collection than face-to-face or telephone research. In the emerging markets, online is increasingly being used to research traditionally hard-to-reach consumers: the wealthy, the young and business decision makers. As economies grow and wages rise, researchers will turn to the Internet to understand the wants and needs of these emergent consumers.

So the growth in online research looks to be assured for some time yet. In turn, traditional data collection techniques will continue to decline. More call centers will close. More interviewers will join that great field force in the sky. However, not all is rosy in the house of online research. The one thing that we all know about the Internet is the way that people use it is constantly changing and changing fast. Where there was once (yes I said once, at least for Generation Y) e-mail there is SMS and social networks. Ask your kids how often they e-mail their friends rather than poke them or send them a text - a worry for an industry dependent on e-mail as its primary channel of communication.

And oh yes, there's the mobile Internet. How do we get those huge grids to be visible on a screen two inches across? It wouldn't be a problem if everyone used a PC to access the Internet but plenty of people today do not. In some emerging markets mobile phone penetration well outstrips fixed-line Internet access. Surfers' expectations of the professionalism and user-friendliness of content on the Web is often well ahead of the usability of our surveys and quality of appearance. Researchers should always try doing their own surveys before they field them and ask themselves if they'd want to spend 25 minutes of their life doing that rather than some other fun thing on the Web.

snapshot

Lightspeed Research's Global CEO David Day looks at the changing face of online research and the impact of forces such as industry consolidation and respondents' shifting Web access habits on the work of both client- and agency-side researchers.



By David Day

Editor's note: David Day is president and global CEO of Lightspeed Research, London. He can be reached at dday@lightspeedresearch.com. To view this article online, enter article ID 20101107 at quirks.com/articles.

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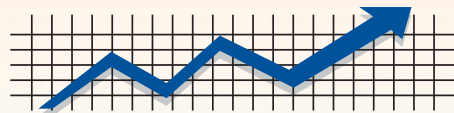
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And then of course there's respondent quality. There has been a rising drumbeat across the industry over the issue of respondent quality. There is no doubt that without careful processes in place during recruitment and fielding of surveys, there are risks that bad or even fraudulent responders can get into a sample. The truth is that now most reputable panel companies put a lot of energy into reducing the risk of poor-quality results and we'll talk more about this below.

No stranger to consolidation

The online panel business is no stranger to consolidation. In the main it has been driven by two factors: a quick way to achieve new market entry and business expansion and, secondly, the need to drive down costs to remain competitive in a market where a lot of buyers choose purely on cost. The recent high-profile mergers and acquisitions in the panel industry are unlikely to be the last. Scale is all-important in such a price-sensitive environment.

Prices will not continue to drop forever. As online becomes a more prominent part of the market research universe, the demand for quality online sample becomes stronger. There is a continuum of prices out there but there is also a continuum of quality. In addition to the true panel companies, there are rivers, aggregators and e-mail lists. Buyers should ask, "Who can provide the appropriate level of quality I need for this study?" as well as, "Who provides the cheapest price?" as there is a relationship between the two. All come with different price points and different levels of quality.

It is also important to realize that when mergers of online research providers take place there is a lot of work to do to integrate the panels from each company. Correspondingly there are questions that clients should ask if information is not being volunteered. For example, there may be a degree of duplication between the panels in a given market. This is typically a problem where usage of online is high and the online population is low. Overlaps of 10-20 percent are not unheard of so it is important that there are processes in place to de-duplicate the panels.

E-mail address is often used but is not a fail-safe method. Some form of unique machine identification is better. It is always important to remember that panel companies recruit and incentivize their panels in different ways and this may have some impact on how the panels respond. This is particularly important for continuous studies or those using norms so clients should ask their provider what steps they have taken to identify such differences and provide some mitigation. Finally, it is important that the past behavior of both panels is retained when they are merged. This is because many clients want to control exposure to a particular study, category or even type of survey. If this data is lost, the ability to control for these exposures goes with it.

Industry-wide standards

In July this year, Kantar and GfK announced the formation of Promedius, a new alliance devoted to improving online data quality. Promedius is a not-for-profit endeavor that aims to develop industry-wide

standards and tools for online research. The foundation of Promedius is a direct response to calls from research leaders in many of the largest client companies. Promedius hopes to be an inclusive organization, one which will have a governance structure reflective of its membership and that will be drawn from both full-service market research companies and online panel companies. Its staff will be employees of Promedius and not affiliated with any single organization.

Q-Point, the Promedius quality solution, includes tools that validate the physical address of online respondents, identify respondent uniqueness and overlap across sample sources, as well as capture category participation using a common standard. The new service also includes a tool to prevent duplicates in studies and provides automated online reports of widely used industry metrics both for end-user clients, researchers and online panel suppliers.

Promedius will also license the intellectual property at no cost to online panel companies that wish to run the solution solely across their own internal panels. From my perspective, this is key. Industry standards need to be transparent and accessible. Promedius also plans to conduct a program of research-on-research to be freely available to the industry and to support both education and the development of the service.

Do access panels have a future?

One question I was asked recently at a conference was, "Do online access panels have a future?" It's a sensible question.

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Despite the rapid consumer adoption of the Internet, it is already becoming harder to not only recruit for but to maintain quality panels. Consumers have a vast number of activities to do online and keeping them engaged on a research panel is becoming more challenging. As noted above, respondents don't want to be bombarded with irrelevant, boring and/or badly-written surveys - and believe me there are plenty of them out there! With so much more to occupy them when they are online, research companies don't have long to retain the interest of respondents. I hate to use the term "surveytainment" but you have to look at the world of research in the context of all the other things battling for a respondent's time and attention.

One very basic element of ensuring quality is to minimize respondent disturbance by sending them only surveys that are relevant to their lifestyle, life stage and interests. Accurately-targeted surveys mean reduced fieldwork times, better responses and, ultimately, cost

savings. The best online panel providers employ a continuous panelist screening and profiling program that gives them not only important demographic information but details on key market sectors such as media and entertainment, health and wellness, financial services and automotive, to name a few.

So part of the answer to the question of the future of access panels is, "It depends." If the industry does not wake up to the fact that respondents are not just a commodity with plenty more wherever they came from, there is going to be a problem with sustainability - at least at the CPI (cost per interview) rates typical today. This is why we need more partnerships between online suppliers, researchers and clients, working together to optimize survey design and enhance the survey experience.

Today in the developed world, online is a major advertising channel (bigger than TV in the U.K.) and many consumers make some of their biggest purchase decisions either online directly or use it to research

the products or services they want to buy. Many of us bank online, do our grocery shopping online and find love online. If we want to understand today's consumer, in many cases it has to be online where we do that research. People are quite comfortable with uploading photos and videos, with chatting online with friends or even complete strangers in social networking. Brands and research companies are utilizing this trend more and more to understand the market and how consumers interact with brands.

In the permission-based world we live in, it will be ever more important to have the agreement of our research subjects secured before we try to understand them. I also believe that we will see more linkages between panels in the future. Understanding the impact of an online ad or viral marketing on in-store sales or the incremental reach that a cross-media advertising campaign delivers are examples of where linking existing panel capabilities will deliver more sophisticated insight. | Q

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Are hyperactive respondents different?

How attrition/conditioning effects impact response bias in online panels

Hyperactive respondents participate in multiple online panels, take many surveys and in many cases have been panel members for years. These professional survey takers complete a disproportionate percentage of online surveys. The sheer number of interviews they complete represents a response bias, but if they are behaviorally different from less-active respondents and the population in general, they will degrade the representativeness of online research. While there has been a great deal of literature disputing this point, we will show that these participants appear to be very different and their overabundance in panels represents a threat to data quality. We believe that only by monitoring these effects and tracking the participation of hyperactive respondents can the quality and consistency of these panels be established and maintained.

Sample attrition in online panels may cause differential sifting with the end result being that the remaining respondents differ from those who begin the process.

Background

Chang and Krosnick conclude that a study of traditional panels (e.g. Fitzgerald, Gottschalk, and Moffitt 1998a, 1998b; Falaris and Peters 1998; Zagorsky and Rhoton 1999; Clinton 2001) showed little or no sample change attributable to panel attrition. They add that it is likely to be even “less pronounced on Internet panels covering diverse topics over time.” All of these papers, with the exception of Clinton, draw their conclusions from demographics. More recently a report on online panels prepared by AAPOR (Baker, et. al., 2010) found that little research existed on the subject and suggested that the commercial panels have the data and should present the research.

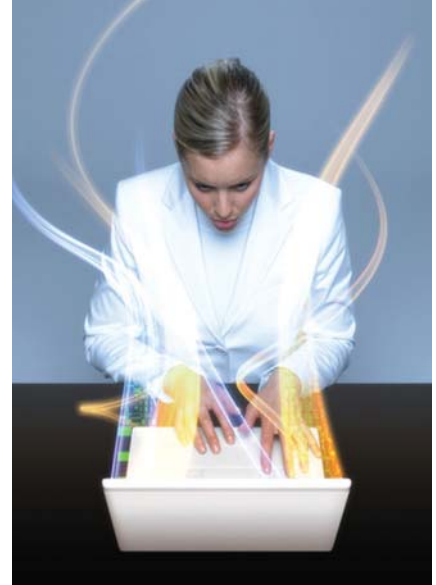
We hypothesize that the panel member who survives over time is likely to represent a particular set of behavioral characteristics. It is counterintuitive to conclude that persons who are willing to participate in 30 or more surveys per month, belong to greater than five online panels and continue to offer such dedication to the process for two or more years could behave

similarly to new panel members, who are likely to drop out of the process entirely, complete very few surveys and never join more than one panel.

The idea that some people are more inclined than others to take surveys is, of course, not new and it is not simply a result of the use of online methods. Bickart and Schmittlein (1999) estimated that between 20 percent and 23 percent of U.S. adults accounted for all survey responses

snapshot

Drawing from a literature review, the authors argue that multi-panel membership, long tenures and hyperactive survey-taking all can affect measures of buyer behavior.



By Steve Gittelman
and Elaine Trimarchi

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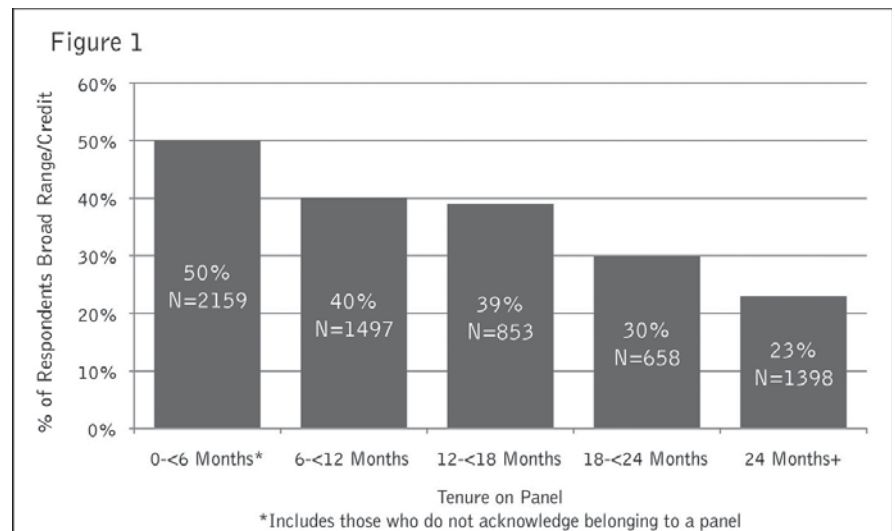
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using any data collection method and that just 4 percent to 5 percent of adults accounted for more than half the total survey responses. The increasing use of online panels has almost certainly concentrated the majority of survey taking within an even smaller sliver of the population. In 2005, ComScore Networks estimated that only 0.25 percent of all Internet households accounted for more than 30 percent of all online surveys taken (Fulgoni, 2005). Recent data, reported by the Advertising Research Foundation (Walker, Pettit and Rubinson, 2009) has indicated that the average online respondent is an active participant in 4.1 online panels. Gittelman and Trimarchi (2009) reported that respondents belong to an average of 4.4 online panels and frequently stay on those panels for years. Furthermore, some respondents complete dozens of surveys every month. These are likely to be different from new, less-experienced respondents.

In fact, according to a new study by North Carolina State University on twins, there is a genetic component to whether an individual takes surveys. In a comparison of identical twins, who share the exact same genetic makeup, and fraternal twins, who share only half their genes (like normal siblings) it was found that a strong correlation in survey-taking existed between identical twins that did not exist between fraternal twins. Fraternal twins share almost identical (except gender) demographic characteristics - it is difficult to think of a more compelling argument that demographic quotas are no longer sufficient to act as a sample frame standard.

The existence of hyperactive respondents is not at issue, today. However, the potential impact of these respondents on the results of surveys is a key topic. Major attitudinal differences were found in respondents who belonged to multiple panels (Casdas, Fine and Menictas, 2006) although they were demographically similar to those in only one panel. The differences appeared to go far beyond demographics and it was suggested that they required weighting by covariates. "Panel conditioning" has been described (Chang and Krosnick, 2009) as a "potential drawback of repeated interviewing, ... whereby accumulat-



Respondents who have spent a longer time on a panel are shown to come less often from the buyer behavior segment that represents those most likely to use high-tech devices and to use credit to expedite their purchases.

ing experience at doing surveys makes panel members less and less like the general public they are intended to represent." In a number of studies, the effect has been found to be minimal or non-existent (e.g., Himmelfarb and Norris, 1987; Cordell and Rahmel, 1962; Sobol, 1959). Willson and Putnam (1982) warned that, "There is a general pretest effect which cannot be ignored." In some cases, they suspected systematic bias, particularly in non-random sampling frames. Further, they found that the effects were inconsistent and thus found it difficult to provide definitive solutions. Chang and Krosnick (2009) found that practice effects altered quality, deducing that the response behavior of panelists is influenced both by practice and interest in subject matter, tying their work into a long tradition of supporting literature on both subjects.

Panel tenure has been identified as a cause of poor predictive validity. Ron Gailey examined why more than a dozen studies that his company conducted showed unrealized decreasing demand for products. He concluded that those research results were fatally affected by a shift in respondent panel tenure that changed the participation of professional respondents (Gailey, 2008).

Inexperienced respondents were more favorable on brand purchasing intent questions than experienced respondents (Coen, Lorch, Piekarski, 2005). Completion of multiple surveys was also found to be a more sensitive measure than tenure. Panelists who

participated in a greater number of questionnaires were more negative to a concept while those who had been long-term but less active members of a panel did not share the same shift of opinion. The authors concluded: "This research underscores the importance of maintaining a stable panel and of using a panel which can provide a consistent mix of respondent experience over time." Coen et. al. concluded that "intent to buy" responses given by frequent survey takers were more in line with reality. A similar result was reported by the Advertising Research Foundation (Walker, et. al. 2009).

Walker, Pettit and Rubinson, working with 17 American panels and a sample size of some 100,000 respondents, declared that the panels were not interchangeable. The driver(s) of this variance appeared to be multivariate. The authors discount multiple panel membership and frequency of survey taking as drivers of variance. The thrust of their analysis on purchasing intent was through soup and paint choice tests, where no measure of hyperactivity appeared to drive changes in purchasing intent. They concluded: "The data suggest that panel practices work together in subtle ways to build groups of respondents with distinctive attitudinal profiles. Though panel tenure may be one such factor, the way panels recruit, the type and amount of incentives offered, and possibly even the 'character' of an individual research/panel company may encourage distinctive panels to emerge whose



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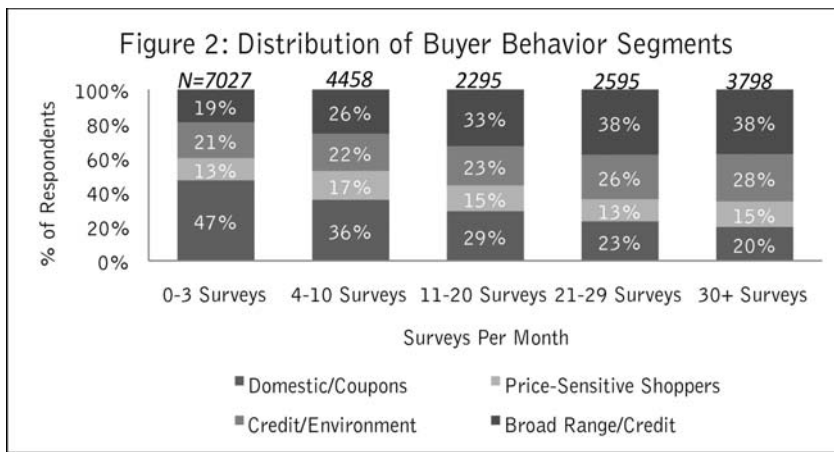
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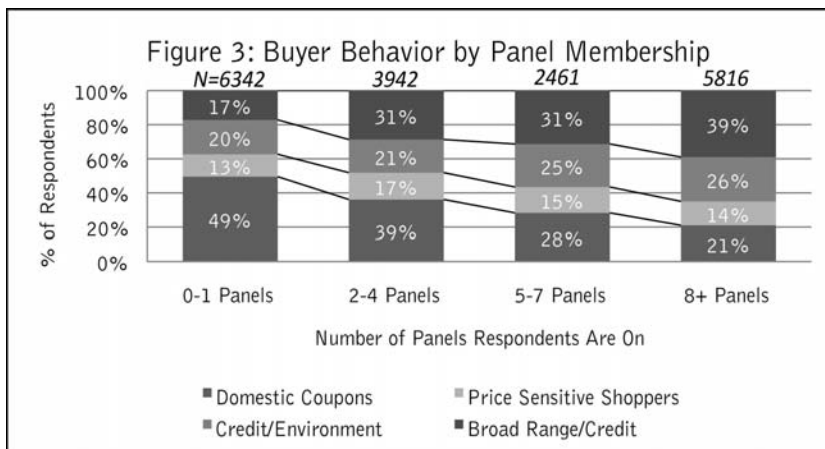
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A representation of how buyer behavior segmentations change with respect to how many surveys an individual takes per month. In all but one category, the differences are significant ($<.05$).



The same results are found using a measure of how many panels a respondent is on.

members share attitudinal and motivational propensities that drive results that may vary from panel to panel.”

Procedures

Meaningful difference in the characteristics between groups of respondents is no guarantee that survey results of specific questions will be different. Some questions are hyper-stable and do not vary with the differences in these groups. Unfortunately, we usually cannot tell when this will happen. What we need are metrics that reflect the fundamental consistency and commonality of samples. Here we test new measures to detect variability in online panels. These metrics are based on the distribution of structural segments, which are derived from the statistical analysis of buyer behavior, sociographic and media attitude questions from a standardized questionnaire. These metrics are sensitive measures of differences between samples and have been used here to examine the potential impact of

professionalism. They are robust measures based on over 30 variables each and are therefore less sensitive to individual responses, thus reflecting the characteristics of the sample.

The current analysis involves 18,561 responses to a Web survey provided by individuals from 17 different U.S. online sample sources. Respondents were collected from May 2008 through February 2010. Quotas were employed for age, income, gender and ethnicity to reflect the census. No effort was made to monitor sample recovery. As these are access panels, sample recovery can be manipulated by choosing the most reliable frequent responders. Given the propensity of certain respondent groups to participate in online surveys, it appears that response rate can easily be managed by choosing among frequent participants. However, there is an inherent risk in such practice: If the frequent responders are different from the population, bias is being injected into the sampling arena.

Figure 1 shows an illustration of the potential impact of professionalism on survey results. The chart shows greater than a twofold change in the frequency of buyer behavior segments between those respondents who have not been on a panel more than six months and those who have been on panels for more than two years. As you will see, this is a typical characteristic and is reminiscent of data reported by Gailey, 2008, where there are dramatic shifts in purchasing intent that progress through time.

Individuals completing the questionnaire were placed into one of four buyer behavior segments based on responses to 37 input variables. Almost half of the respondents who report taking three or fewer surveys per month are placed within a buyer segment that tends to shop on credit rather than waiting. On the other hand, 20 percent represent individuals who report taking many surveys (more than 30 per month) are disproportionately placed in a segment that skews high on use of coupons (Figure 2).

Similar results are seen when subdividing respondents by the number of panels to which they report belonging. On average, these 18,561 respondents – most derived from well-known online sample providers – indicate being members of 4.4 panels. Almost 45 percent acknowledge being a member of at least five panels. On the other hand, 23 percent of these respondents say they are members of no panels at all.

Almost half of those who claim to be in no more than one panel fell into the buyer behavior segment called “Broad Range/Credit.” This segment is composed of people who report relatively high levels of behavior on virtually half of the items used for the segmentation. These items include: making high-tech purchases, downloading music, listening to Internet radio and buying on credit rather than waiting. Members of eight or more panels fall disproportionately into the “Domestic/Coupons” segment. This segment is composed of people who tend to report relatively low levels of behavior on these measures except when it comes to buying American-made products and using coupons (Figure 3).

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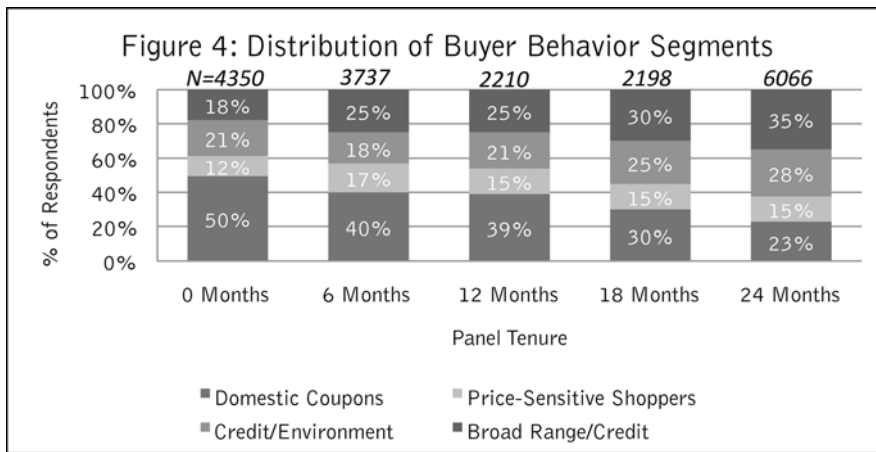
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Panel tenure represents how long an individual has been on a panel and is a straightforward way of representing the effects of conditioning/attrition on sampling frames.

Panel tenure also affects how respondents are distributed among the buyer behavior segments. Half of the respondents who indicate being a member of a panel for less than six months fall into the “Broad Range/Credit” segment, while those that are veteran members and indicate 24 or more months of service in at least one panel disproportionately fall into the “Domestic/Coupons” segment. Distributions into the other two buyer behavior segments – “Price-Sensitive Shoppers” and “Credit/Environment” – vary, but less dramatically across these measures (Figure 4).

Media attitudes in question

In addition to looking at differences in buyer behavior, survey-taking experience was analyzed in the media usage segments. Some might assume that those taking more surveys and joining more panels would be computer-oriented respondents. Figure 5 suggests that it is those who take fewer surveys and have joined fewer panels for shorter periods of time that fall heavily in an Internet media segment in which activities such as social networking, video downloading and instant messaging tend to be high.

This imbalance suggests that, if a media or channel decision were to be based on results of an online survey, the recommended decision could vary greatly depending upon the blend of tenure and hyperactivity represented by respondents who answer the survey. If they were less-tenured online respondents who tend to join fewer panels and take fewer surveys, a higher

emphasis could be placed on online advertising than if they were online survey-taking veterans.

Tempted to blame the respondents

While researchers might be tempted to blame the respondents who take so many surveys for these difficulties, it is hard to say it is really their fault. The online research industry has developed in such a way that many companies have economically benefited by having such people join panels and self-select their way into surveys by deciding to respond to invitations sent to them. Some researchers and suppliers have promoted the concept of achieving online respondent quality by using carefully prepared sub-populations. These resulting panels are then heavily used, resulting in an increase in professional participation.

The reality is, respondents provided by online sample sources are going to contain a mix of short- and long-tenured panelists – neither set is readily removable. Organizations supplying respondents to online surveys for the most part depend upon a business model that allows them to recoup recruiting costs by using their panelists multiple times. While most will continually recruit in order to keep their panel numbers up, continually supplying surveys with only “fresh” respondents would result in a massive disruption of that business model, even if getting a less-involved set of respondents were to be deemed positive.

Provide improved quality

Filtering or culling potential “bad”

respondents has been proposed as a means to provide improved quality of online panels. This is applied in any number of ways to reduce problem respondents and to force the sample to be in agreement with specified demographics. In many cases, additional culling is necessary; for example, to remove duplicate respondents and clearly erroneous behavior. Some efforts are being made to cull “the worst” respondents from online sample pools.

However, rarely is culling used to restrict hyperactive survey takers from samples. The issue of hyperactive respondents is usually not associated with sampling frame filtering. Quota controls based on demography and/or sample frame selection by probabilistic methods matter little if the individuals retained represent the demography of a population but are substantially different in their behavior.

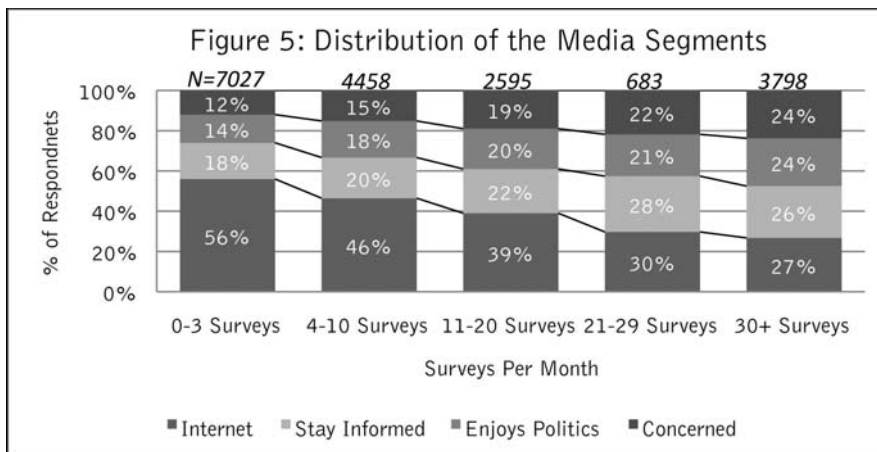
Clearly, data source characteristics, including the incidence of professionals, vary among panels within a country. Within-country variability in the sampling frame is increased by the merger of suppliers and the ebb and flow of convenience partnerships created when single companies cannot reach quotas and need to reach beyond the ability of their own resources to fulfill them.

Blend data sources

An alternative method to stabilize the characteristics of respondents is to blend data sources. We suggest that segmentations such as those used above are broad measures of behavior that could be used as blending targets. To do so, baseline data must be collected to generate combinations of panels that approximate the collective Web survey population within a country or market. This method would then employ various optimization models to create recommended blends of panels that most closely match this overall grand mean. The resulting blends should be stable at least to the extent that they are more representative of the total Web survey populations.

We conclude that testing online populations against single measures is unwise. We risk choosing those variables that are hyper-stable. Instead, we support a multivariate approach.

As important as the performance



The Internet segment represents those who engage in activities such as online social networking and instant messaging. Those who take a great many online surveys participate in these activities significantly less.

of individual data sources is, their consistency is critical. Walker et. al. conclude that online panels are consistent through time. Their test spanned a matter of only a few weeks. There are many potential reasons why an online sample source might be inconsistent across time. The changing presence of professional respondents is clearly one of the most important. Clients using online sample sources should insist that the pool of individuals surveyed this month be similar to those surveyed in the future. Without such assurances and a means for monitoring them, the casualty will be the survey results themselves. | Q

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Gaining a foothold

A look at business-to-business market research in Russia

The Russian market research industry is growing rapidly, driven both by domestic growth and the huge interest in the country by foreign investors. In a country where market research was virtually non-existent less than two decades ago, foreign and domestic agencies are conducting large volumes of work aimed at helping new companies expand into Russia and established companies defend and extend their positions.

This article examines the development of the market research industry (in particular the business-to-business market research industry) in Russia and the unique characteristics that set Russia apart from other research markets. We then move on to predict what the future holds before finishing with some recommendations for buyers looking to research this fascinating market.

Development of the Russian market research industry

The Russian market research industry dates back to the early 1990s, when large multinational companies such as P&G, Unilever and Coca-Cola began a large-scale expansion into the Russian market. These major FMCG players introduced a culture of marketing and market research to Russia, at a time when the country was experiencing a transition from a planned to a market economy. It could be said that as well as profiting from the increasingly deregulated market, these companies actually accelerated the transition.

Unlike another key developing market, China, business-to-business research played an important part in the very early development of the market. This was mainly driven by European and North American companies, who were beginning to see Russia as an

important market and who were keen to establish manufacturing operations in the country. Hence, most research in these early days consisted of market entry and other market assessment studies, looking at issues such as routes to market, value chain analysis, market needs and entry strategies.

As there were no real market research agencies or qualified researchers, no culture of market research and few international language skills in the domestic market, most early B2B studies were carried out by consulting

snapshot

While business-to-business research is relatively new in Russia, its use is growing along with the size of the Russian economy. The authors detail some of the most-used techniques and offer insights for those considering investigating this vast market.



By Tatiana Klimenko
and Matthew Harrison

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Over time, Western client companies entered the Russian market and a requirement for comprehensive, independent research into Russian consumers and businesses developed. This led to the arrival of large international research firms such as ACNielsen, Macro International, MMRB and GfK. This in turn led to the establishment of indigenous market research agencies. Russian Market Research Company (RMRC) was set up by Greg Thain, F-Squared was established by Michael Fodor and Shane Farrell, and Russian sociologists such as Elena Coneva (Comcon) and Elena Bashkirova (Romir) entered the social research arena.

Market size and growth

As with the research industry in most countries, consumer research dominates in terms of market size. By 1995, the market was worth around \$30 million, with B2B research representing almost \$3 million of this.

Despite the financial crisis of the late 1990s, the Russian research market has continually grown at an exponential rate. By 2001 the total market was still worth a relatively modest \$55 million, but by 2007 it had grown by a further 473 percent to \$260 million, and an estimated \$325 million in 2008. The market is believed to have shrunk by up to 20 percent over the following 18 months and currently lies at around \$300 million. The B2B share of this market still stands at under 10 percent, around \$25 million to \$30 million. It is worth putting this growth in context by looking at the size of the world’s two biggest research markets. Total turnover in the U.S. is currently estimated at around \$8 billion, against \$2.5 billion in the U.K.

The drivers of the exponential growth we have described are many and varied. Number one, however, is simply the growth of the Russian economy, which began with the move toward a market-based economy in the early 1990s. This

Figure 1: Types of Studies Conducted in Russia

Types of Studies	Mid-1990s	Mid-2000s
General market overview		
Market size evaluation		
Routes to market & dealership studies		
Use & attitude		
Segmentation		
New product concept testing		
Advertising studies		
Branding and image studies		
Pricing studies		
Car clinics		
Customer satisfaction		
Mystery shopping		

stimulated both domestic demand and foreign interest in Russia as a target market in both B2C and B2B sectors. Secondly, between 2003 and 2008, there was a huge flow of oil dollars into the country. Not only did this engender interest in research related to the oil industry, more generally it boosted the Russian economy, further stimulating foreign interest. Thinking more specifically about the market research industry, the capabilities of agencies based in Russia have increased significantly, meaning that clients now have a high level of confidence in the data with which they are provided.

Which types of studies are conducted?

The projects conducted early in the life of the Russian market research industry were largely based around market access, market sizing and routes to market. This reflected the fact that buyers were foreign companies with little knowledge of the Russian market and little or no presence in the market.

As Figure 1 shows, this situation changed dramatically within the space of a decade. All major types of B2B research are now conducted in Russia, including research aimed at enabling differentiation in relatively mature markets (such as branding and segmentation studies). As a result, studies now tend to be more detail-focused, requiring more high-level staff and specialist staff (such

as statisticians) than ever before. Product development research has also become important to buyers of Russian B2B market research.

It is worth mentioning that mystery shopping has suddenly become fashionable among Russian clients, including B2B companies, over the past five years. One reason why this type of research is viewed as so important is the need to increase service levels in Russia in most industries. This is seen as a particular problem amongst Russian companies, rather than multinationals. Unfortunately, the objectives, opportunities and limitations of this type of study are often misunderstood and the projects perceived more as a tool for identifying and admonishing underperforming staff rather than controlling and improving service standards.

Specialized pricing studies and customer satisfaction are still quite rare and are initiated mainly by foreign clients as part of their multicountry surveys. More often these themes are studied in a limited scope within the framework of use and attitude, segmentation or concept testing studies.

Qualitative versus quantitative

The ratio between qualitative and quantitative B2B research studies (by value) has been gradually changing throughout the 1990s and the 2000s in favor of quantitative surveys. In the 1990s quantitative studies

Figure 2: Key B-to-B Market Research Locations Within Russia

First Tier

Location	Key Industries
Moscow	Hyper concentration of financial resources. Highly developed service sector and booming construction.
Tyumen Region	Main oil producing region in Russia with two-thirds of the country's volume of oil extraction
St. Petersburg	Industrial and transport center (year-around ice-free port)

Second Tier

Location	Key Industries
Republic of Tatarstan	Chemical industry, aviation industry, machinery
Sverdlovsk Region	Industrial center (metallurgy, machine building)
Samara Region	Automotive industry, airspace industry
Republic of Bashkortostan	Chemical industry
Perm Region	Oil refining and chemical industry
Kemerovo Region	Metallurgy, coal mining, machinery
Republic of Komi	Timber, coal mining
Omsk Region	Machinery
Tomsk Region	Machinery

were rare, with the prominent use of desk research and expert interviews reflecting the fact that most research was geared towards market assessment and market entry. Now, however, the qual/quant ratio is estimated at around 50:50, with use and attitude, product concept testing and segmentation studies moving away from qualitative and toward quantitative methodologies.

Geographical tendencies

The geographical scope of research studies in Russia has changed as the horizons of Russian and international companies have widened. It is fair to say that, at the same time as becoming broader in geographical scope (and less Moscow-centric), studies have also become more focused on particular areas, with an increasing need to split results between specific key regions. Outside Moscow, St. Petersburg is the second-most researched location, with industrial centers such as Ekaterinburg (Urals), Rostov-on-Don (Southern Russia) and Voronezh (Central Russia) increasingly important. But, of course, each

individual project and client has its own locations of interest.

Figure 2 shows where the key industries, and often therefore research into these industries, tend to be located. This has been divided into two tiers, in descending order of prominence.

Key agencies carrying out research in Russia

Foreign firms are still dominant when it comes to commissioning B2B market research studies in Russia, accounting for around 80 percent of market revenue. However, whilst in the early 1990s the majority of clients were located abroad, now about half of the studies are initiated by their local offices or by domestic companies.

Russian clients have developed a particular interest in B2B studies in the telecommunications industry (e.g., MTS, Beeline, Megafon), financial and banking services (Alfa-bank, Uralsib and others), the automotive industry (among them GAZ plant and OAO "Promtractor"), metal manufacturing (RGMC, Evraz Group and others)

and construction (for example, MIEL, MIAN). Foreign companies are also interested in these sectors, as well as the traditional industrial sector, where routes to market and avoiding competing on price are key issues for them.

Around two-thirds of all commercial market research studies in Russia - and 80 percent of all B2B projects - are executed by nine to 10 major agencies, many of these international agencies. Major players include ACNielsen, GfK, TNS, Ipsos, Comcon (Research International), Armi-Marketing (Millward Brown) and B2B Vector.

How is information gathered?

The most effective interviewing method in Russia remains face-to-face interviews. This methodology allows interviewees to see exactly who they are speaking to. This is an important factor in an environment where concerns about industrial espionage and surreptitious visits from regulators are common. In a face-to-face meeting, Russian respondents may well be willing to spend around an hour speaking about their business and their views on a range of issues. A financial or other gift is usually provided to the respondent as a thank-you for his or her participation.

Telephone interviewing is therefore far less common than in Western markets, for the above reasons and also because there is a cultural hesitancy to spend long periods of time discussing issues in this way. Whereas in Western markets telephone interviews of 30 minutes-plus are quite common, 15 minutes is the usual maximum in Russia, meaning that questionnaires have to be more focused and shorter. This is a key challenge in a country as vast as Russia, as telephone interviews are often the only viable option when respondents are scattered across distant regions.

Cultural concerns over confidentiality, as well as an unfamiliarity with the egalitarian dynamic of group discussions, have also hindered the development of face-to-face focus groups, which are very uncommon in Russia. As is the case in China,

mini groups of up to four people are often the maximum focus group size achievable.

Desk research is an invaluable source of data within Russia, with the myriad of associations and government agencies offering good-quality macroeconomic and industry-specific information. Most of this information is available in Russian only, though English data is increasingly available. Because of the language issue, good-quality desk research almost always requires a Russian-speaking consultant.

Online data collection techniques (notably Web surveys and online focus groups) are currently in their infancy in Russia, hindered by limited bandwidth, limited access to Internet connections by respondents (especially in outlying regions) and limited acceptability of online data collection amongst all but a few respondent groups (notably IT professionals and those aged under 30). These barriers are particularly strong away from key centers such as Moscow and St. Petersburg. However, they are also diminishing over time and online techniques are predicted to grow substantially over the coming three to five years.

What can and can't be asked?

The Russian business environment is less open than is the case in Western markets, meaning that certain types of information are difficult to obtain. Most difficult of all is company financial information – even basic information such as revenue and profit – which in many Western companies would appear on the company Web site. This makes competitive studies and market sizing projects quite a challenge.

In general, the less established market research culture, and the relatively hierarchical structure within companies, means that respondents are not familiar with answering projective questions or exploring idea generation. The most effective questionnaires are those which focus on facts and opinions on clearly defined subjects, rather than exploratory or projective questioning.

Price of market research studies in Russia

Russia is a vast country, and it is well-known that Moscow is one of the most expensive cities on earth. Agencies within Russia recognize the value to their clients of good-quality intelligence relating to this important market. For these reasons, market research within and outside the capital is significantly more expensive than any of the other BRIC countries and comparably priced to research in Western countries. Clients are therefore increasingly diligent when weighing up the ROI of research in Russia but usually conclude that obtaining an informed view of this unique market is worth the investment.

Into the future

Despite the current worldwide financial crisis, the long-term prospects for the Russian B2B market research industry look bright. The rate at which the market develops will depend largely on its ability to adapt to the following challenges:

1. The immaturity of Russian clients' marketing philosophy and business approach, which is currently driven by low costs, assumption of effortless growth of demand and low competition.
2. Lack of market research traditions among companies operating in the B2B spheres.
3. Ad-hoc financing or low annual budgets for market research.
4. Unrealistically low price expectations toward market research initiatives among client companies.
5. Quality problems that were experienced early in the life of the research industry and have had a lasting impact on clients' views of the industry.
6. Communicating with the potential client base, which is dispersed across the world and across industries.
7. Convincing foreign clients to commission work within Russia.

Recommendations for research buyers

Business-to-business research represents a significant niche in the

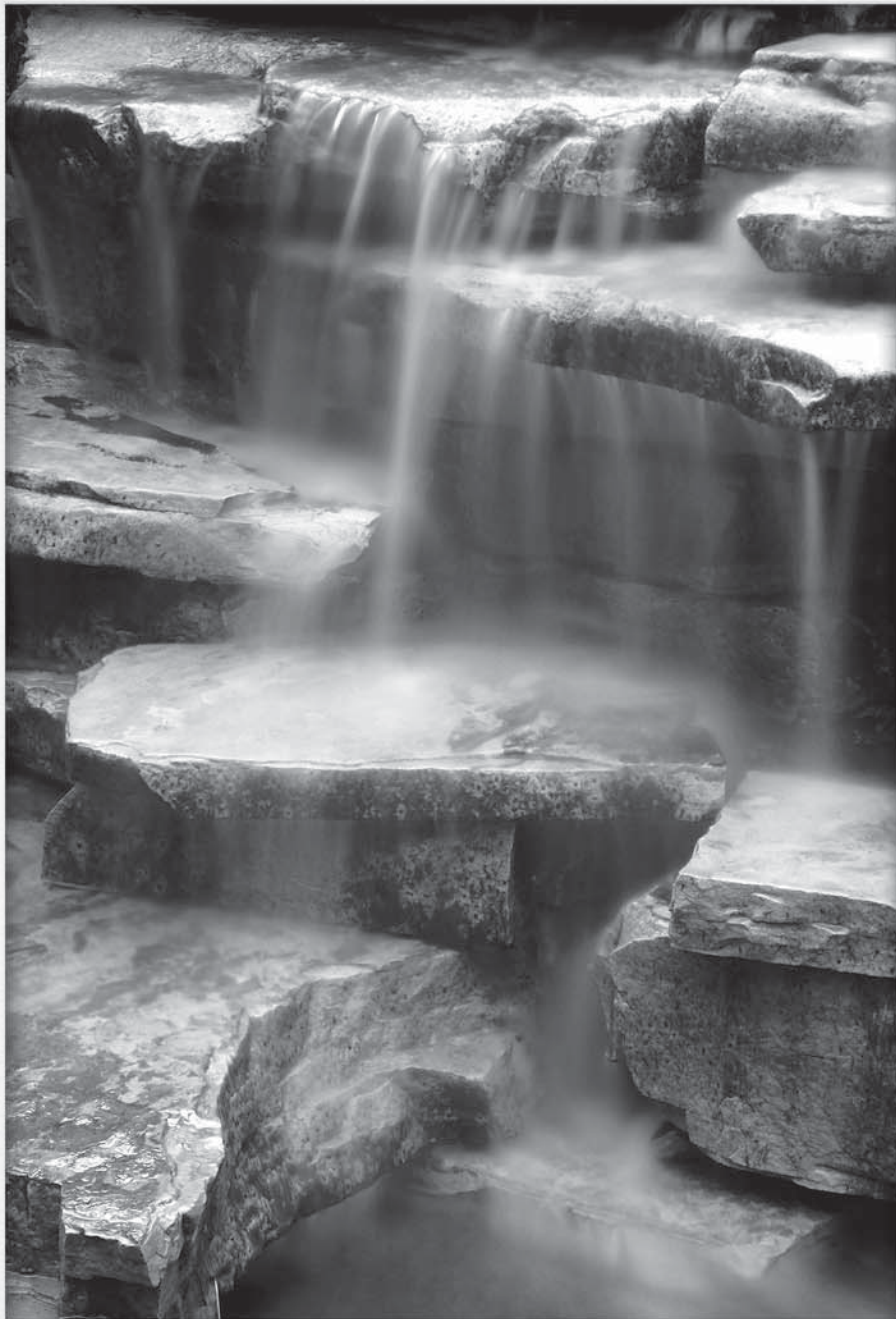
Russian research industry. It is developing quickly as domestic and international clients alike recognize the value of researching Russian markets. If you are considering commissioning market research in Russia, we would make three key recommendations:

Scoping. Russia is a vast country and it is impossible to research it all at once. Is it really the whole of Russia you are interested in? If you entered the Russian market, would you really be able to service Vladivostok on the Pacific coast as well as Moscow? Are your customers really spread equally throughout the country or are they concentrated in one or two regions? Far better to focus on the region or regions that are important to you.

Professional rates for a professional job. Travelling around a country the size of Russia is expensive. In "European" Russia, particularly Moscow, travel, flights, rents, hotels and most other overheads are comparatively expensive. This has a direct impact on all businesses' prices. Most importantly of all, professional and experienced business-to-business researchers are uncommon in Russia and their fees tend to reflect that.

Trust the agency. Conducting market research in Russia is different from conducting research in North America or Western Europe. Face-to-face contact is key. Incentives, which are seen as an acknowledgment of a respondent's expertise, are more necessary than in Western Europe. Telephone questionnaires are shorter than in the U.S. and Canada, whereas face-to-face interviews in Russia can take as long as an hour. The line of questioning tends to be more direct and less projective than may be the case on a Western questionnaire. The good-quality agencies that are now operating in Russia are well-positioned to advise you on these issues and ensure that you get the most from your project. | Q

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The Fine Art of Marketing Research

Asking the tough questions

Conducting competitive intelligence research among Internet providers in Brazil

As in other developed countries, the telecom market in Brazil has been impacted by the convergence of the Internet, mobile phone and landline phone services. A leading provider of mobile phone services in Brazil needed to benchmark some Internet providers in the country in order to launch its own mobile Internet services and be sure that its new product was in line with local market demand.

The client's first goal was to understand the human resource structure of six of its main competitors in Brazil to understand the number of employees and level of training necessary for its own staff to be able to offer a similar or better Internet service.

Our client's second goal was to identify these Internet providers' business plans, which would allow them to better understand the objectives upon which their business core was focused. We sought to collect strategic market information about the important competitors in order help our client create its own differentiating and unique market positioning.

For us, the major challenges were the collecting of valuable, helpful strategic information from competitors without being unethical.

The client needed precise and deep information about the competitors' human resource structure in parallel with a mapping of their business plans, including their shareholding structure, headcount, professional profiles of their main executives, the core competencies of their staff, staff remuneration, internal politics, turnover and professional development incentives.

Understanding the business marketing positioning of those providers meant learning their business plan, marketing positioning,

main revenue sources, portfolio of services and prices as well as comparative SWOT analysis among the six Internet providers surveyed.

Requires a well-established plan

B2B firms are a specific segment for which gathering any type of information requires a well-established data collection plan since this process faces the barrier of information confidentiality.

Thus, we laid down a methodological strategy based on two pillars: 1) desk research (secondary data collection), and 2) primary data

snapshot

The author details a competitive intelligence study of six Internet service providers in Brazil and how a mix of primary and secondary research helped obtain the information needed for the client to introduce a new service.



By Geisa Rodrigues

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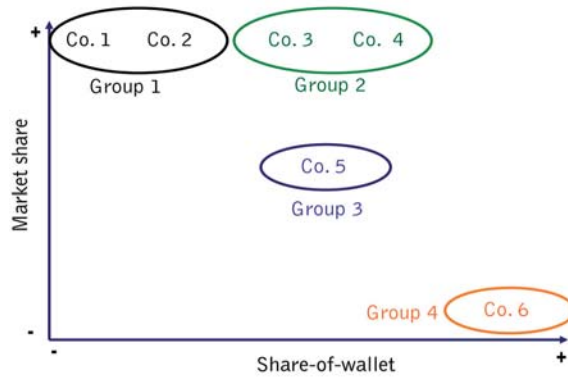
Figure 1

Group 1: Company 1 and Company 2 play with the most aggressive strategies to conquer the greatest piece of the market. They compete among each other mainly by price.

Group 2: Company 3 and Company 4 also fight for the biggest piece of market, but seem to adopt a more cautious pricing positioning since they worry more about profitability than Group 1.

Group 3: Company 5 has an intermediate position among all companies.

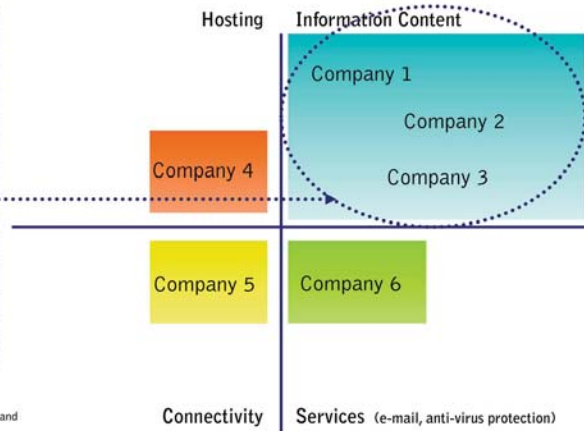
Group 4: Company 6 is the one mostly concerned about profitability.



Note 1: Information based on interviewees' responses
 Note 2: Statistical technique: simple crosstab

Figure 2

Information content is the business strategy adopted by the main Internet providers, who battle among each other to offer the most variety and fastest delivery of information to Internet users.



Source: Face-to-face interviews with directors and managers of the companies studied

collection. The latter relied upon a qualitative research methodology through in-depth interviews with two key people from each Internet provider - one person from the human resources department and a second from the engineering and/or information technology departments. Only manager-level interviewees were recruited.

The interview instrument was a semi-structured questionnaire lasting approximately 50 minutes that was built to employ indirect questions. In other words, fieldwork researchers were trained for the possibility of interviewees not wishing to answer questions they felt were too invasive. Thus, in instances where they

could not obtain very close answers, they could accept approximate ones. For instance, instead of directly asking, "What are the officers' salaries?", the questionnaire employed structured questions in which a scale of pre-stipulated salary amounts was defined. (The scale of salary ranges was obtained from desk research on salary standards per position in Brazil from Catho, a Brazilian human resources consulting firm.) As a result, a distinguishable salary range was collected for each employee position from each company and the comparison among those findings offered enough information to closely estimate the remuneration policy for each Internet provider.

Similarly, the business plan of each company could not be obtained all through secondary data collection but mainly through interviewing decision makers from each company. Again, the use of non-invasive questions helped overcome the barrier of confidential information. In the previous desk research data collection phase, using the client's expertise about the business, we were able to pre-define some parameters to guide possible answers to use on the questionnaire.

So instead of directly asking the interviewees to describe the company's business plan, questions were developed so that the interviewee made choices among the possible answers (a categorical scale of answers varying from "agree" to "disagree", 1 to 5) instead of clearly offering a precise (and potentially confidential) answer. Thus, results showed not exact answers but approximate answers that nevertheless gave shape to each company's strategic business steps.

In an accurate manner

Well-considered methodology choices together with well-planned instrument decisions form a solid research strategy when it comes to competitive intelligence data collection. However, successful data-gathering can only be achieved if the items above are dealt with in an accurate manner, together with the prior training of researchers on human intelligence skills. In other words, researchers must be in some way senior strategic thinkers and deeply know the objectives of the project. Overall, they have to be able to develop questionnaires and also be intelligent and insightful interviewers.

Another critical part of the process is, naturally, the cooperation of the interviewees. Cooperation was secured two ways:

1. By offering them a convincing incentive in the form of a general summary report of the findings at the end of the study with the purpose of creating an impression that all companies researched and

the (unnamed) client shared strategic information. If opinion leaders such as the respondents recruited for this project did not feel they were obtaining new information while giving information, then there would be no cooperation. Information is the most valuable currency for this type of respondent. (Note: The summary report did not expose the client nor did it offer detailed information.)

2. By satisfactorily explaining the purpose of the study to the interviewees. Taking into account that the client's name needed to be confidential, interviewees were informed that a national macro-economic study was being carried out to benchmark an aspect of the Internet business in Brazil, so their participation to make the study as complete as possible was crucial. In practice, while some objectives were revealed other specific objectives were omitted.

Build a complete picture

Projects based on information gathered from the staff of competing firms require competitive intelligence analysts to take the findings and build a complete and accurate picture. In the end, the client felt that the combination of primary and secondary data sources in this study led to its success and effectiveness as a tool to support its strategic business plan. Further, the researchers' experience with CI analysis and data mining along with their background in the telecommunications industry lent credibility to the report.

Findings revealed that aiming for market share versus share-of-wallet (Figure 1) were two opposite possible strategies of the Internet business in Brazil. Few companies are able to balance both strategies and be market-share leaders while also leading in profitability. In other words, while most Internet companies are fighting over the number of clients, it seems that some of them are mostly concerned with higher profit margins (share-of-wallet), sacrificing obtaining the largest number of clients (market share).

According to the key people interviewed for the research, the information content to be offered by each Internet provider's Web portal is the business anchor for the companies, to which a great part of their effort is directed (Figure 2). They are also focused on the expansion of national coverage as a strategy for competitive advantage.

The findings directed the client's business plan in a way that paved the way for the launch of a new product that offered Internet access

to desktops and laptops through cell phone signals.

Choosing the right mix

The success of projects such as this lies in choosing the right mix of data collection techniques, developing a strategy for obtaining the information the client is seeking, training interviewees to be thorough without appearing too invasive and mustering the skills to interpret and analyze the primary and secondary data. | Q



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Survey Monitor

continued from p. 8

end of 2011, and about a quarter doubt our economy will ever fully recover.

But beyond feelings about where the economy is today and where it is heading next, fundamental doubts and concerns are being raised about the U.S. The country is split on whether America's best days lie ahead or behind. A slim majority, 52 percent, say they are ahead, while 48 percent say they have passed. There is, however, consensus around another point - 71 percent agree that America is fundamentally broken and not working.

The clearest implication is that, going forward, consumers are expected to be a lot more frugal. Forty-one percent are planning to cut back on their spending over the next three-to-four months, compared with 8 percent who plan to increase it. Thirty-five percent say they plan to cut back their online spending over the next three-to-four months, compared with 12 percent who plan to increase it. Nearly 80 percent say they are planning to spend less money for Christmas this year, and 87 percent say they do not plan to make a big-ticket purchase (such as a house or car) in the next three-to-four months. Forty-nine percent have already delayed making a big-ticket purchase during the past few months. Over a quarter of Americans don't expect their personal finances to fully recover from the downturn until after 2011, and just as many (26 percent) think their personal finances won't ever fully recover. For more information visit www.strategyone.com.

Women, teens and minorities the most talk- and text-happy

Think you can guess which Americans talk or text the most on their cell phones? This is not the white man's domain. According to New York researcher The Nielsen Company,

African-Americans use the most voice minutes - on average more than 1,300 a month. Hispanics are the next most-talkative group, chatting an average of 826 minutes a month. Even Asians/Pacific Islanders, with 692 average monthly minutes, talk more than whites, who use roughly 647 voice minutes a month.

African-Americans and Hispanics also text the most. Hispanics send and receive around 767 SMS messages a month while African-Americans send and receive around 780 - significantly more than Asians/Pacific Islanders (384 texts a month) and whites (566 texts a month).

And if you thought women in the U.S. talk more than men on their mobile phones, you thought right. On average, women talk 22 percent more than men (856.3 minutes a month compared to men's 666.7). Turns out, American women are more communicative in general on mobile devices. They text more, sending or receiving an average of 601 SMS messages a month compared to the 447 monthly text messages sent or received by the average American male.

Not surprisingly, teens text the most, sending or receiving an amazing 2,779 SMS messages a month. In the next two age brackets, text usage falls by more than half each time, with those ages 18-24 sending or receiving 1,299 messages and those ages 25-34 exchanging an average of 592 messages. While text usage varies greatly between those 18-24 and those 25-34, their voice usage is quite close (981 voice minutes for 18-24 and 952 minutes a month for those 25-34 years old.)

Location plays into usage patterns as well. Southerners are the most talkative, but while Florida ranks high in terms of monthly voice minutes used, it ranks very low for text messaging (the state has one of the highest median ages, and older Americans text the least). Mississippi, interestingly enough, ranks high for both talking and texting. For more

information visit <http://blog.nielsen.com/nielsenwire>.

In with the old - social networking use picks up among Boomers

While social media use has grown dramatically across all age groups, older users have been especially enthusiastic over the past year about embracing new networking tools. Social networking use among Internet users ages 50+ nearly doubled from 22 percent in April 2009 to 42 percent in May 2010, according to data from the Pew Internet and American Life Project, a Washington, D.C., nonprofit.

Between April 2009 and May 2010, social networking use among Internet users ages 50-64 grew by 88 percent, from 25 percent to 47 percent. During the same period, use among those ages 65+ grew 100 percent, from 13 percent to 26 percent. By comparison, social networking use among users ages 18-29 grew by 13 percent, from 76 percent to 86 percent.

"Young adults continue to be the heaviest users of social media, but their growth pales in comparison with recent gains made by older users," says Mary Madden, senior research specialist, Pew Internet and American Life Project. "E-mail is still the primary way that older users maintain contact with friends, families and colleagues, but many older users now rely on social network platforms to help manage their daily communications."

One in five (20 percent) online adults ages 50-64 say they use social networking sites on a typical day, up from 10 percent one year ago. Among adults ages 65+, 13 percent log on to social networking sites on a typical day, compared with just 4 percent who did so in 2009. At the same time, the use of status update services like Twitter has also grown - particularly among those ages 50-64. One in 10 Internet users ages 50+ now say they use Twitter or another service to share updates about themselves or see updates about others. For more information visit www.pewinternet.org.

Are women unrealistically optimistic about the state of their finances?

About 71 percent of women believe they are independent and on or ahead of target when it comes to achieving financial goals, but their confidence may be unfounded, according to a study from Penn Mutual Life Insurance Co., Horsham, Pa. Approximately 61 percent of women who identified themselves as independent are behind target on building savings, and 13 percent have yet to begin saving at all. Numbers are similar for independent women paying off debt: 53 percent are behind their target, and 14 percent have not begun to pay down their loans.

Women who characterize themselves as independent are more likely than the non-independents to be on track with respect to paying off debt (33 percent vs. 19 percent of non-independent women), building up their savings (26 percent vs. 18 percent, respectively) and guaranteeing they will maintain or enhance

their lifestyle during retirement (26 percent vs. 17 percent).

Women who view themselves as independent also look positively at the possibilities of their future and have set goals to meet them. Independent women are significantly more likely than those who do not view themselves as independent to say they are on or ahead of target for being able to save for future travel (29 percent vs. 18 percent) and save for a home remodel (20 percent vs. 10 percent). For more information visit www.worthforwomen.com.

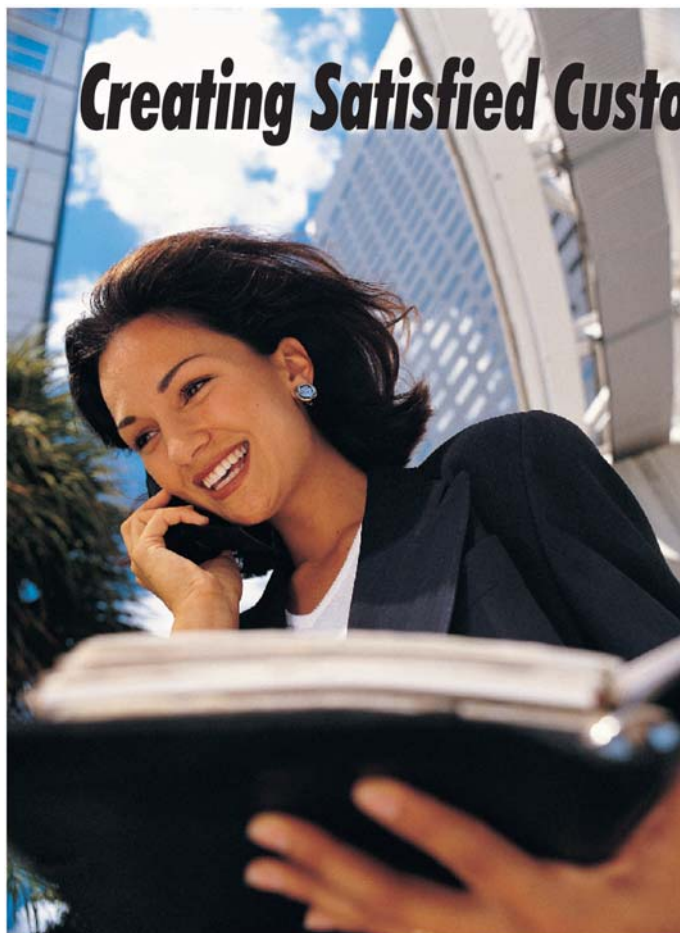
Privacy concerns not enough to put users off of social network advertising

Across the U.S., U.K. and Canada, over 70 percent of respondents who use social networks on a daily basis are concerned about their privacy and believe their experience is being jeopardized by scams or sleazy ads, according to a study from Vancouver, B.C., research company Vision Critical. Less

than one-sixth expressed trust in online social networks, forums and blogs, compared to more than one-third for radio, television and online news.

Seventy-two percent of respondents agree that online social networks are very dangerous for children and teens, and another 64 percent expressed concern that online social networks are selling personal information to advertisers.

Despite privacy concerns and a lack of trust, 58 percent of respondents are receptive to brands advertising on social networks, and one-third believe this practice leads them to make better purchasing decisions. Nearly one-quarter of respondents indicate they have purchased a product as a result of seeing something on an online social network. Additionally, one-third of respondents don't mind online social networks using personal preferences to target ads because it means they'll be more relevant. For more information visit www.visioncritical.com.



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Product and Service Update

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dropped the \$5,000 setup fee in Southeast Asia. ComScore previously charged to have Web sites tagged for measurement by its Media Metrix 360 solution. This move follows the waiver of the \$5,000 setup fee in the U.S. earlier in 2010. For more information visit www.comscore.com.

Co-production feature allows clients DIY power

NIPO Software, an Amsterdam, the Netherlands, research software firm, has extended its data collection suite to include a co-production capability intended to allow clients to conduct do-it-yourself research with the blessing of their market research suppliers. The product aims to allow end customers to collaborate at a technological level with market research providers by giving the end customer restricted access to the technical infrastructure of the research company through a Web portal. The new co-production capability will be available to all NIPO users by the end of 2010. For more information visit www.niposoftware.com.

Gongos releases mobile app with rewards component

Gongos Research, Auburn Hills, Mich., has launched its i°Communities mobile app, and the app will be offered to consumers registered in the company's client-sponsored communities. Additionally, it is intended to serve as a gateway for the public to participate in the company's Consumer Village online community. Participants in sponsored activities through i°Communities mobile will earn points that transfer into Amazon.com gift certificates, and Gongos will also donate a 5 percent match on points earned in Consumer Village to charities.

The app is designed to offer consumers the ability to participate in discussions, flashpolls and mobile-enabled online surveys; connect with other like-minded consumers about topics of interest; capture

and upload images and video to the community; and discover active discussions among members with the Shake it Up feature.

The i°Communities mobile app is available as a free download for the iPhone and iPod touch in the iTunes App Store. For more information visit gongos.com.

Imperium updates RelevantID technology

Westport, Conn., research company Imperium has launched version 3.1 of RelevantID, its digital fingerprinting technology. The updated version includes Fraud Profile Score, designed to predict the potential for fraudulent respondent behavior by assigning individuals a Fraud Profile Score of 0 - 100; Verity, a data validation service that aims to validate survey respondent self-reported data with third-party sources to confirm the accuracy of a person's name, address and other demographics resulting in a validation score; and Address Correction, a service intended to validate and normalize addresses in the U.S., U.K. and Canada to post office standards. For more information visit www.imperium.com.

Kinesis updates panel solution

Kinesis Survey Technologies LLC, an Austin, Texas, research company, has released version 3.0 of its Kinesis Panel solution. The updated version includes new functionality, such as a versatile campaign manager interface; expanded querying options; the ability to append project-specific data to samples; an advanced e-mail spam scoring system; and multilingual execution options. Additionally, new application programming interfaces are available for expanded system integration and the creation of custom panelist Web sites (Kinesis Community Portal).

Kinesis Panel can be integrated with several independent survey applications but is best suited for use with Kinesis Survey. For more information visit www.kinesisurvey.com/kinesis-survey/kinesis-panel.

Companies partner to gauge commitment of prime-time TV audiences

General Sentiment, a Charlotte, N.C., media measurement technology firm, and Manhasset, N.Y., research firm The Q Scores Company have partnered to launch TV Audience Evaluation Reports (TVAERs). TVAERs are designed to evaluate audience involvement and commitment to prime-time television shows by collecting data from real-time Internet tracking and online surveys. The offering combines data from General Sentiment's Involvement Index, which measures the online discussion/word-of-mouth generated by prime-time TV shows, with Q Scores' Emotional Bonding Q, which determines a program's ability to hold onto valuable viewers over time. For more information visit www.qscores.com.

Briefly

Encino, Calif., research company uSamp has begun testing its mobile surveying platform with several mobile applications providers. The mobile app is designed to simplify the delivery of sample for researchers by building on uSamp's Web-based panel management platform. Surveys delivered through uSamp's mobile application will be short, and rewards for participating will center on virtual currency and remain user-specific. For more information visit www.usamp.com.

Fort Washington, Pa., marketing intelligence company Centris has expanded its technology tracking program to place more emphasis on the Hispanic market segment. Centris has also released a profile online of the Hispanic market. For more information visit www.centris.com.

ICM Direct, a division of ICM Research, London, has launched a B2B and B2C tele-depth interviewing service designed to complement its quant work, online panel and online random sampling capabilities. For more information visit www.icmresearch.co.uk.

GfK Roper Consulting, a division of GfK Custom Research North America, New York, has added qualitative insights to its U.S. consumer trends service, GfK Roper Reports US. The additional features will incorporate a visual component. For more information visit www.gfkamerica.com.

The 2010 Retail Business Market Research Handbook from Richard K. Miller and Associates has been released. The handbook aims to provide retail data by organization, geographic location and merchandise category to help researchers better allocate budget dollars. For more information visit www.rkma.com.

Merrill Research and Associates, San Mateo, Calif., and the EE Times Group, a San Francisco electronics solutions company, have launched EE Intelligence, an online research panel for conducting electronics-focused research. For more information visit www.eeintelligence.com.

TiVo, Alviso, Calif., has increased the sample size of its Power | Watch opt-in panel to 100,000 households. For more information visit www.tivo.com.

Pittsburgh Web semantics company Bueda has rolled out Five, a semantic-based social lead generator designed to facilitate meaningful and engaging conversation around a promotional message by understanding the message being promoted and identifying the users on various social networks that would be most receptive. For more information visit www.fivebybueda.com.

Ipsos ASI, a Norwalk, Conn., research company, has introduced its Big Idea service in the Middle East and North Africa region. Big Idea is designed to be used before substantial investments are made in the development and production of ad campaigns. For more information visit www.ipsos-asi.com.

Peanut Labs, a San Francisco research company, has debuted its Social Media Asia Sample, providing

www.quirks.com

market researchers with access to an online population of social media users in China, Japan and South Korea. For more information visit www.peanutlabs.com.

Rochester, N.Y., research company Harris Interactive has launched its Body Mass Index (BMI) Specialty Panel. The panel will include adults from whom Harris Interactive has obtained height and weight information, and the panelists will be grouped into one of four categories: underweight, normal weight, overweight and obese adults. For more information visit www.harrisinteractive.com.

Orem, Utah, research company Western Wats has launched research panels in Germany and France. Additionally, the company's Opinion Outpost online panel has expanded to over 100,000 participants. For more information visit www.westernwats.com.

London research company Kantar Media has developed a JICREG-accredited approach to regional readership data collection which incorporates telephone interviewing. For more information visit www.kantarmedia.com.

Alice M. Tybout and Bobby J. Calder have released the second edition of *Kellogg on Marketing*, a book designed to look at fundamental marketing concepts such as branding and understanding consumers. The book also includes insights into topics such as social innovation and consumer-generated media. For more information visit www.wiley.com.

EDigitalResearch, Hampshire, U.K., has redesigned its Web site (www.edigitalresearch.com) to include a demonstration survey; U.K. benchmarking and statistical data; and StatStor, an integration of social media platforms and industry news feeds.

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Research Industry News

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Pacific Marketing Research, Santa Monica, Calif., its Premier Partner Award for excellence in providing strategic marketing research.

New York research company **Authentic Response** has been recognized as having the best customer service among online sample providers in a July 2010 study conducted by **MarketResearchCareers**, New York.

Vancouver, B.C., research company **Vision Critical** has been ranked No. 12 among the Deloitte Technology Fast 50, a listing of the 50 fastest-growing technology companies in Canada, based on the percentage of revenue growth over five years.

Catherine Fish of **BrainJuicer Group PLC**, London, has been awarded the Young Researcher of the Year Award at the 2010 ESOMAR Congress.

Survey Sampling International (SSI), a Shelton, Conn., research company, has named **MarketVision Research**, Cincinnati; **Sinomonitor Market Research**; and **Product Perceptions**, a Crawley, U.K., research company, as the winners of its SSI QUEST Awards, which honor companies for creating engaging research experiences. Product Perceptions also received the BEST in QUEST Award for the top survey performance globally.

New accounts/projects

Entercom Communications Corp., Bala Cynwyd, Pa., has signed multi-year, multi-market contracts for Columbia, Md., research company **Arbitron Inc.**'s Portable People Meter and diary radio ratings. The agreement extends Entercom's use of Arbitron's services in all of Entercom's radio markets.

Oslo, Norway, research software company **Confirmit** has signed a three-year reseller agreement with Australia-based **Information Research Management** (IRM), allowing IRM to resell the Confirmit product suite in the Australian and New Zealand markets.

Portland, Ore., research company **Rentrak Corporation** has entered into a contract with the **Smithsonian Channel**, Washington, D.C., to provide its TV Essentials local market measurement service. Rentrak has also signed an agreement with entertainment company **RightNetwork** to provide its OnDemand Essentials local market measurement service.

Al Aan satellite channel, Dubai, United Arab Emirates, has selected Dubai research company **YouGov Siraj**'s panel to conduct polls across the Arab region.

Starcom MediaVest Group, Chicago, has selected **Actual Customer Behaviour**, Brighton, U.K., to conduct convergence research in a project called 1-3-9 Media Lab, which is intended to examine how advertising impact differs across household media platforms.

Market Publishers Ltd., London, and **TechSci Research**, New Delhi, have formed a partnership authorizing MarketPublishers.com to distribute and sell TechSci's research reports.

Miami research consultancy **Medix International** has selected Cologne, Germany, research company **Globalpark** for its feedback management platform.

Westport, Conn., research company **Imperium** has formed the Imperium User Group, an online forum for users and clients to share data quality best practices; explore data quality topics; and suggest product enhancements.

Separately, Boston research company **Communispace** has

adopted Imperium's RelevantID digital fingerprinting technology.

G & S Research Inc., Indianapolis, has been chosen as a preferred supplier by **Amgen**, a Thousand Oaks, Calif., human therapeutics company.

Retail Insights, an Antwerp, Belgium, research company, has selected Kansas City, Mo., research company **Decision Insight**'s SimuShop platform to interact online with large samples of shoppers in a virtual store environment.

Stockholm, Sweden, research company **Cint** has added several companies to its **Panel Exchange**, bringing the number global panelists to 4 million. Among the new additions are **The GfK Group**, Nuremberg, Germany; **Cotterweb**, Mendota Heights, Minn.; **spiderMetrix**, Melbourne, Australia; **MotivAction LLC**, Minneapolis; **Itracks**, Saskatoon, Saskatchewan; **Fotolog**, New York; **C&R Latino Eyes Panel**, Chicago; **Universal Survey**, New York; and **Hachette Filipacchi Media**, New York.

M/A/R/C Research, Dallas, has adopted Irvine, Calif., business intelligence company **WiseWindow**'s MOBI (mass opinion business intelligence) platform to add to its research.

New companies/new divisions/relocations/expansions

Chicago research company **Synovate** has restructured its operations in China, Hong Kong and Taiwan to form the Greater China business unit, which includes all of Synovate's offices in the region: Shanghai, Beijing, Guangzhou, Chengdu, Hangzhou, Shenzhen, Wuhan, Hong Kong and Taipei.

Innerscope Research, Boston, has opened a West Coast office in Los Angeles.

Iconoculture, a Minneapolis research company, has launched its

India Consumer Advisory Service.

Research Panel Asia Inc., Tokyo, has launched a 24-hour operation center in the Philippines.

User Vision, an Edinburgh, Scotland, user experience company, has opened an office in Dubai, United Arab Emirates. The office is located at Office 508, The Fairmont Dubai, Sheikh Zayed Rd.

Cello Group PLC, a London research company, has opened an office in New York.

Berlin, Germany, research company **eye square** has established an office in Tokyo. Stefan Nüsperling has been chosen to lead the office.

Portland, Ore., research company **Webtrends** has opened a location in Tokyo and has made available the Japanese version of Webtrends Analytics On Demand. Webtrends Japan will be headed by Kazayuki Kimura.

Market Insight Corporation, a Palo Alto, Calif., research company, has launched **Market Insight (Asia) Limited**, a Hong Kong-based, wholly-owned company.

Compass Marketing Research, Norcross, Ga., has opened its Culinary Research Center, a facility that houses a domestic and commercial test kitchen.

Hall & Partners, a New York research company, has launched its Shopper Insights and Shopper Engager division.

Orem, Utah, research company **Western Wats** has opened a service bureau in Toronto.

New York research company **WorldOne** has opened its Tokyo office.

Research company earnings/ financial news

Cint, Stockholm, Sweden, has secured \$13 million in financ-

ing from **Prime Technology Ventures**, Amsterdam, the Netherlands.

Invoke Solutions Inc., Waltham, Mass., has fulfilled its \$1.75 million mixed-securities offering with six investors: **Bain Capital**, Boston; **BEV Capital**, Stamford, Conn.; **BRM Group**, Fort Lee, N.J., and Israel; and **North Atlantic Capital**, Portland, Maine.

Revelation Inc., Portland, Ore., reported sales growth of over 300 percent for the fiscal year ended June 30, 2010.

Decipher Inc., Fresno, Calif., announced revenue growth of more than 55 percent in the quarter ended July 31, 2010, over the previous-year quarter.

BrainJuicer Group PLC, London, announced interim results for the six months ended June 30, 2010, including 49 percent revenue growth; 119 percent growth in operating profit; and 108 percent increase in profit before tax.

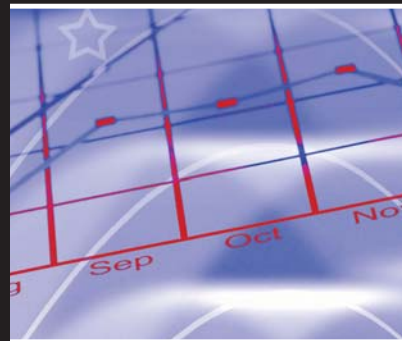
MarketSight LLC, Cambridge, Mass., posted a 49 percent increase in revenue for the first half of 2010, compared with the same period in the prior year.

Communispace, Boston, announced a 29 percent year-over-year increase in revenue for its 2010 fiscal year.

Synovate, Chicago, reported £248.8 million in revenue for the six months ended June 30, 2010, up 6.1 percent. Gross profit rose 5 percent to £152.9 million while operating profit was £4.7 million, compared to a loss of £3.2 million in the same period in 2009.

USamp, Encino, Calif., recorded revenue growth of 167 percent in year-over-year results, driven by an increase in global consumer panels and river sampling and the acquisition of DMS Insights from AOL.

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Names of Note

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Reston, Va., research company *comScore Inc.* has appointed **Wolf Allisat** as executive vice president, international markets.

Vancouver, B.C., research company *Vision Critical* has appointed **Adrian Chedore** to its board of directors. Additionally, **Monique Morden** has been promoted to president, global partner program, and COO, national panels.

Innerscope Research, Boston, has hired **Bill Stephenson** as senior vice president, sales and client services; and **Marjan Massoudian** as senior market research consultant. The company has also promoted **Emily Hardy** to account director. All three will be based in Los Angeles.

Heather Hutzel has been promoted to associate research analyst at *Directions Research Inc.*, Cincinnati.

Survey Service Inc., a New York research company, has hired **Jacob Brach** and **Gina Ferrentino** as project manager.

AbsolutData Research and Analytics, San Francisco, has hired **Dana Hayman** as senior vice president and general manager, CRM strategy and analytics; **Carol Franczek** as vice president, client services; **Heather Kluter** as director, client services; and **Laura DeYonker** as a consultant in the New York area.

Atlanta research company *Infosurv*

has hired **Carl Fusco** as director, operations; **Dede Fauconnet** as vice president, strategic partnerships; **Kyle Burnam** as director, marketing and new product development; **John Barrett** as vice president, sales; and **Chet Bertolli** as senior project manager.

Ned Greenberg has joined Ipsos *OTX MediaCT*, a Los Angeles research company, as vice president, syndicated solutions. He will be based in New York.

The Advertising Research Foundation, New York, has appointed **Todd M. Powers** as chief research officer.



Powers

Priest

M/A/R/C Research, Irving, Texas, has promoted **Bill Priest** to vice president. The company has also appointed **Katherine Klein** as moderator/qualitative specialist and Megan Gumbrecht as research manager.

ABI Research, Oyster Bay, N.Y., has named **Sam Rosen** senior analyst, digital home.

The Kantar Group, a Fairfield, Conn., research company, has appointed **Renee Smith** as chief research officer. The company has also named

Tim Kelsall senior vice-president, client strategy, innovation and delivery. Kelsall will be based in London.

The Futures Company, a Chapel Hill, N.C., research company, has hired **Steve Levine** as senior vice president, future-facing quantitative practice; and **Christine Baskin** as senior vice president, research and consulting, future-facing quantitative practice.

Alex Terry has been appointed executive vice president and general manager, Zoomerang, of San Francisco research company *MarketTools Inc.*

Bangalore, India, research company *Cross-Tab* has appointed **Fredrik Nauckhoff** to its global advisory board and **Tom Paul** as associate vice president, client services. Paul will be based in Chicago.

Ignacio Galceran has been named regional CEO, Latin America, of Horsham, Pa., research company *TNS*.

Portland, Ore., research company *Rentrak Corporation* has hired **Evan Goldfarb** as senior vice president, agency sales, advanced media and information. Additionally, **Brent Rosenthal** has been named vice chairman of Rentrak's board of directors.

Mountain View, Calif., research company *Atomic Labs Inc.* has hired **Len Emmick** as vice president, global sales and partnerships.

Mark Connon has joined Concord, Mass., research company *Umber Systems* as corporate development and chief privacy officer.

Columbia, Md., research company *Arbitron Inc.* has appointed **Erica Farber** as director.

Port Washington, N.Y., research company *The NPD Group* has named **Nathan Shipley** director, client development, auto aftermarket. Shipley will be based in Houston.

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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 Research Now (formerly e-Rewards Inc.), Dallas, and ESOMAR, Amsterdam, The Netherlands, for providing input on the questions.

2010

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 150 firms that have 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 industry and audience cross-index section. This section, which begins on page 97, 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.

ACNielsen

Schaumburg, IL
Ph. 847-605-5000
info@nielsen.com
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

Panel Titles:

Affordable Samples Online Business Panel
Size: 900,000 Type: Online
Affordable Samples Online Consumer Panel
Size: 2,000,000 Type: Online

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(See advertisement on p. 79)

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clientservices@allglobal.com
www.allglobal.com

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
Proprietary Panel Mgmt.: Yes

Panel Titles:

Panelspeak Business and Consumer Panel
Size: 100,000+ Type: Online
Panelspeak Technology Panel
Size: 60,000+ Type: Online

Amplitude Research Inc. is a full-service online survey company specializing in consumer, B2B and technology market research surveys. Our proprietary Web panels deliver high-quality sampling among general consumers, business executives, small business owners, sales and marketing professionals, middle and executive management, network administrators, software developers, IT managers and many other difficult-to-reach selects. All surveys are programmed and administered by our experienced professional staff. In working with our company, you can expect responsive, personalized service. We handle projects throughout the U.S., Canada, Europe, South America and Asia.

Anderson Analytics, LLC

Stamford, CT
Ph. 888-891-3115 or 203-912-7175
inquiries@andersonanalytics.com
www.andersonanalytics.com
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.m-s-g.com
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. 83)

**Authentic Response, Inc.**

New York, NY
Ph. 1-888-AR-PANEL
info@authenticresponse.com
www.authenticresponse.com
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.

AutoPacif, Inc.

Tustin, CA
Ph. 714-838-4234
dan.hall@autopacific.com
www.autopacific.com
Panel Titles:
AutoPacif VehicleVoice Panel
Size: 25,000 Type: Online

B&N PanelWizard BV

9701 DA Groningen
Netherlands
Ph. 31-50-3657-672
info@panelwizard.com
www.panelwizard.com
Proprietary Panel Mgmt.: Yes

**Borderless Access Panels**

Bangalore
India
Ph. 91-80-4178-5814 or 866-614-8047 toll-free
rfp@borderlessaccess.com
www.borderlessaccess.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Borderless Access Panels - Brazil - Consumer & B2B
Size: 100,000 Type: Online
Borderless Access Panels - China - Consumer & B2B
Size: 100,000 Type: Online
Borderless Access Panels - India - Consumer & B2B
Size: 300,000 Type: Online
Borderless Access Panels - Russia - Consumer & B2B
Size: 100,000 Type: Online

Borderless Access is the emerging market online research specialist with over a decade of experience in building and

maintaining panels across geographies. We have proprietary panels in Brazil, Russia, India, China (BRIC) and our global footprint and partnership lets us reach over 60 million consumers. We help companies globally to fulfill their research needs by connecting with their consumers online. We have been awarded the Grand Mean Project Certification from Sample Source Auditors (Mktg Inc.) for exceeding their quality parameters as a sample source that does not exhibit outlier characteristics.

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
info@crresearch.com
www.crresearch.com
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 is a full-service market research company. Specialized divisions - KidzEyes®, TeensEyes®, MomEyes®, LatinoEyes®, BoomerEyes® and ShopperEyes® - provide expert demographic insights, including youth and Hispanic panels and Omnibus services. C&R's YouthBeat® offers a comprehensive view of today's youth, while ParentSpeak's online parent community provides a platform for discussions by parents.
(See advertisement on p. 51)

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
Panel Titles:
VOICE of the Region
Size: 10,000 Type: Telephone, Online

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
Proprietary Panel Mgmt.: Yes
Panel Titles:
US/Intl. Consumer, B2B, Healthcare, & 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 eight-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
info@touchstoneresearch.com
www.touchstoneresearch.com/child_research
Proprietary Panel Mgmt.: Yes
Panel Titles:
Childresearch.com Panel
Type: Online



CONNECTING RESEARCHERS WITH PEOPLE

Cint USA Inc.

Smyrna, GA
Ph. 404-992-7943
contact-USA@cint.com
www.cint.com
Proprietary Panel Mgmt.: Yes

Cint, a global technology company focused on the market research sector, has built a proprietary platform (Cint Panel Exchange) that brings over 4 million online panelists to one place. Panelists come from over 500 online panels in 40 countries. The SaaS-based platform offers full sample transparency, providing research buyers the opportunity to fully control their sample selection, out-go and project management. It is the only platform where panel owners open their panels for research services and openly share key data points such as response rates, panel size and recruitment methodologies. (See advertisement on p. 17)

City Research Solutions

Janesville, WI
Ph. 608-314-8493
mel@cityresearchsolutions.com
www.cityresearchsolutions.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
CRS Consumer ePanel
Size: 2,000 Type: Online
CRS Families ePanel
Size: 1,500 Type: Online

Clear Seas Research

Troy, MI
Ph. 248-786-1619
info@clearseasresearch.com
www.clearseasresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
myCLEAROpinion
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

CM Research

Epsom, United Kingdom
Ph. 44-208-786-7303
contact@cm-research.com
www.cm-research.com
Panel Titles:
Veterinary professionals in France
Size: 3,000 Type: Online
Veterinary professionals in the UK
Size: 3,000 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
FacilityManager@crcresearch.com
www.crcresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Consumer Research Panel, The
Size: 90,000 Type: Online
PharmaField Research
Size: 125,000 Type: Online

Creative Marketing Research Ltd.

Ipswich, 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-Tab Marketing Services

Mumbai, India
Ph. 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

Data Zone Research & Consulting, Inc.

Atlantic Beach, FL
Ph. 410-414-5718
robin@datazoneresearch.com
www.datazoneresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
The Vet Zone.com
Size: 4,000+ Type: Online

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1991

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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

Datatelligence Online

Ormond Beach, FL
Ph. 386-677-5644
sales@datatelligence.com
www.datatelligence.net

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
Proprietary Panel Mgmt.: Yes

Decipher offers complete custom online panel and online community solutions customized to your objectives, including panel design, recruitment and panel 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. Decipher also offers sample aggregation services from a variety of sources, including traditional research panels and both targeted and broad-based online communities.
(See advertisement on p. 30, p. 31)

**Decision Analyst, Inc.**

Arlington, TX
Ph. 817-640-6166 or 800-262-5974
jthomas@decisionanalyst.com
www.decisionanalyst.com
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. 81)

Diagnostics Plus, Inc.

State College, PA
Ph. 814-234-2344
jfong@diagnosticsplus.com
www.diagnosticsplus.com
Panel Titles:
Diagnostics Plus Healthcare 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

DoctorDirectory.com, Inc.

Asheville, NC
Ph. 828-255-0012 x109 or 888-796-4491 x109
sales@doctordirectory.com
www.doctordirectory.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
DoctorDirectory Physician Panel
Size: 650,000 Type: Mail, Online

EcoUnit LLC

Los Altos, CA
Ph. 650-283-4774
service@ecounit.com
www.ecounit.com
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
Proprietary Panel Mgmt.: Yes
Panel Titles:
Embrain Panel
Size: 1,500,000 Type: Online

A number of doctors. Not doctored numbers.

NOW AVAILABLE WITH
PANEL SUPPLEMENTATION

**Extensive Panel Representation**

The Epocrates Honors® panel includes clinicians representing most medical specialties and occupations in the U.S. and the G5.

Fast Results

The demonstrated responsiveness of the Epocrates Honors panel means fast project turnaround.

Reliable Panel

Physicians joining the Epocrates Honors panel undergo a rigorous verification process to ensure their authenticity.

EPOCRATES
QUICKRECRUIT
Online Healthcare Recruitment

Epocrates Honors and QuickRecruit are registered trademarks of Epocrates, Inc. in the U.S. and other countries.

Contact us for a quote:
quickrecruit@epocrates.com
www.epocrates.com/quickrecruit


Advanced Segmentation Strategies

Segmentation is the foundation of positioning, and the lodestar for new product development.

Our segmentation technologies include:

- Psychographic segmentation (values, attitudes) using latent class factor and cluster analyses, probability modeling, Bayesian posterior probabilities, and discriminant analyses.
- Database segmentation (with millions of customer records) using dichotomous and polytomous logistic regression, latent variable analyses, and decision tree models.
- Geodemographic segmentation templates for all U.S. households.
- XML, XSLT, SQL, Visual C++, SAS, SPSS and R-Language programming.
- GIS mapping systems to analyze multiple segmentation overlays.

If you are interested in learning more about advanced analytics and market segmentation strategies, please give us a call at 817-640-6166 or visit www.decisionanalyst.com.



Decision Analyst
The global leader in analytical research systems

604 Avenue H East ■ Arlington, TX 76011-3100

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FREE STATSM™ statistical software,
www.decisionanalyst.com/download.aspx

EMI - Online Research Solutions

Cincinnati, OH
Ph. 513-321-9955
sales@emi-ors.com
www.emi-ors.com
Panel Titles:
Online Global B2B
Size: 3,000,000 Type: Online
Online Global B2C
Size: 30,000,000 Type: Online
Online Global Healthcare
Size: 7,000,000 Type: Online

ePanel Co., Ltd.

Beijing, China
Ph. 8610-6222-5238 or 8610-6441-6300
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, Inc.**

East Windsor, NJ
Ph. 650-227-1756
quickrecruit@epocrates.com
www.epocrates.com/quickrecruit
Panel Titles:
Epocrates Honors® Dentist Panel
Size: 20,598 Type: Online
Epocrates Honors® Dietician/Nutritionist Panel
Size: 2,718 Type: Online
Epocrates Honors® Nurse Panel
Size: 172,909 Type: Online
Epocrates Honors® Nurse Practitioner Panel
Size: 59,547 Type: Online
Epocrates Honors® Optometrist Panel
Size: 7,803 Type: Online
Epocrates Honors® Pharmacist Panel
Size: 62,402 Type: Online
Epocrates Honors® Physician Assistant Panel
Size: 34,834 Type: Online
Epocrates Honors® Physician Panel
Size: 177,000 Type: Online
Epocrates Honors® Podiatrist Panel
Size: 4,273 Type: Online
Epocrates Honors® Veterinarian Panel
Size: 1,791 Type: Online

Epocrates QuickRecruit® service offers access to an extensive health care panel representing most medical specialties and occupations in the U.S. and the G5. Epocrates has worked with hundreds of market research firms, bringing the experience and reliability you need to ensure a successful recruitment project. Contact us today for more information about our targeted recruitment services.

(See advertisement on p. 80)

E-Poll Market Research

Encino, CA
Ph. 877-MY-EPOLL or 818-995-4960
client@epoll.com
www.epollresearch.com
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
Panel Titles:
e-Research-Global.com Panel
Size: 160,000 Type: Online

eSample Solutions

(U.S. & Canada Headquarters)
Saskatoon, SK Canada
Ph. 306-979-0984
info@esamplesolutions.com
www.esamplesolutions.com
Panel Titles:
eSample B2B Panel (U.S./Canada)
Size: 3,000,000+ Type: Telephone, Online
eSample Consumer Panel (U.S./Canada)
Size: 14,000,000+ Type: Online
eSample Healthcare Patient Panel (U.S./Canada)
Size: 500,000+ Type: Telephone, Online
eSample Hispanics
Size: 100,000+ Type: Telephone, Online
eSample International Panel (200+ Countries)
Size: 7,000,000+ Type: Mail, Telephone, Online
eSample IT Professionals
Size: 100,000+ Type: Telephone, 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, 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. 82)

FGI Research

Chapel Hill, NC
Ph. 919-929-7759
info@fgiresearch.com
www.fgiresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
SmartPanel of Consumers
Size: 850,000 Type: Online
SmartPanel of Growing Families
Size: 35,000 Type: 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. Intercultural Marketing and Communication

Tokyo, Japan
Ph. 81-50-5534-3915
inquiry@GlobalLinkAssociates.com
www.GlobalLinkAssociates.com
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
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
alambert@m-s-g.com
www.m-s-g.com
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. 83)

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



MARKETING SYSTEMS GROUP

Leading the Way

Our suite of products & services assist you in all phases of your research

▼ GENESYS Sampling

Address Based Sampling - **Nearly 100% coverage** of all households in the country, including cell phone only households
Cellular Telephone Samples - Provides a solution for reaching households that are no longer in the traditional RDD frame
Data Appending Services - Use of multiple data sources to maximize match rates resulting in lower data collection costs
Screening Services - Attended screening with real time cell phone detection

▼ ARCS

Panel Management tools to recruit, track participation and panelist information
Multi-mode capability allows you to contact your panel via IVR and Web
Robust project management tools

▼ PRO•T•S

researchPredictive dialing designed specifically for research phone projects
Recordings, individual questions or the whole survey
Interfaces to **multiple CATI systems** with a single dialer

800.336.7674

www.m-s-g.com



**GfK Custom Research
North America****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: 2,000,000 Type: Online

GfK Custom Research North America combines the global resources of the GfK Group with the local knowledge of North America's leading research and consulting companies delivered by more than 700 employees in the U.S. and Canada. Beyond our sector-specific experts, specialty practice areas and research centers for excellence, we deliver unmatched knowledge designed to help your business grow. By offering you access to several of the world's largest databases combined with a full range of ad hoc research services, GfK Custom Research North America delivers proven, state-of-the-art solutions developed from a 360-degree view of your market.

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

Belleuve, WA
Ph. 866-5-ASK GMI or 206-315-9300
info@gmi-mr.com
www.gmi-mr.com
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

GMI's (Global Market Insight, Inc.) technology-enabled services, provide access to the right people at the right time to deliver the right results, empowering researchers and marketers worldwide to generate reliable, consistent and actionable information that enhances their decision-making capability. GMI's global online panels reach millions of authentic, unique respondents worldwide, and its professional services, including survey programming, hosting, fielding, data collection and reporting solutions, are available around the clock and around the globe. GMI has operations in the U.S., Europe and Asia-Pacific. (See advertisement on p. 85)

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 or 866-611-9829
sales@hotspex.com
www.hotspex.biz
Proprietary Panel Mgmt.: Yes
Panel Titles:
Hotspex Global Panel
Size: 4,000,000+ Type: Online

**i.think inc**

i.think inc.
Dallas, TX
Ph. 214-855-3777
bmack@thinkinc.com
www.itthinkinc.com
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. 35)

Insight Counts

Hendersonville, TN
Ph. 615-822-5860
dartahall@insightcounts.com
www.insightcounts.com
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
projectteam@interfaceasia.com
www.interfaceasia.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
InterfaceAsia 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

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: 680,000 Type: Online
Ipsos U.S. HTI Panel
Size: 350,000 Type: Mail, Telephone, Online
Latin American Online Panels
Size: 995,500 Type: Online

Itracks

Saskatoon, SK Canada
Ph. 306-665-5026 or 888-525-5026
info@itracks.com
www.itracks.com
Panel Titles:
Itracks Canada Talk Now
Type: Online
Itracks USA Talk Now
Type: Online

**KL Communications, Inc.**

Red Bank, NJ
Ph. 732-224-9991
klc@klcom.com
www.klcommunications.com
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.



START

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- 200 Countries
- Quality through Authentication and Validation

Right Time

- Professional Services available around the clock and around the globe
- Rapid, trustworthy and cost-effective execution
- Mobile and computer based delivery engines

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- Quality algorithms for End-to-End respondent monitoring
- Interactive Survey Design Solutions for data accuracy



www.gmi-mr.com/insight

+1-206-315-9300 (Seattle, Global Headquarters)

+61-2-9290-4333 (Sydney, Asia-Pacific Headquarters)

+44 (0) 20 7399 7010 (London, EMEA Headquarters)

Seattle Beijing Boston Chicago Cincinnati Colombo Denver London Los Angeles Minneapolis Munich Oslo Paris Pittsburgh 's-Hertogenbosch San Francisco Shanghai Singapore Sofia Sydney Tokyo Valencia Vancouver Washington D.C.



Knowledge Networks

New York, NY
 Ph. 646-742-5300
 know@knowledgegenetworks.com
 www.knowledgenetworks.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 KnowledgePanel Latino SM
 Size: 5,000 Type: Online
 KnowledgePanel[®]
 Size: 50,000 Type: Online
 National Shopper Lab
 Size: 22,000,000 Type: Online
 Physicians Consulting Network (PCN[®])
 Size: 70,000 Type: Mail, Online

At Knowledge Networks we are passionate about innovative online research that consistently gives leaders confidence to make key decisions. We deliver affordable, statistically-valid online research via KnowledgePanel[®] - the only probability-selected, nationally-representative Internet panel that uses an address-based sample frame, to represent cell phone-only households and other difficult-to-survey populations. KnowledgePanel Latino SM enables researchers to conduct statistically-balanced online surveys on the full U.S. Latino population. Plus KN has an industry-leading physician panel and a research-ready behavioral database of frequent supermarket and pharmacy shoppers.



Lightspeed Research

Warren, NJ
 Ph. 908-605-4500
 info@lightspeedresearch.com
 www.lightspeedresearch.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Lightspeed Automotive Specialty Panel
 Type: Online
 Lightspeed B2B ELITEopinion 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

For market researchers, agencies and corporate marketers seeking a deeper understanding of consumers, Lightspeed Research provides digital access to the most qualified panelists whenever, wherever and in whatever segments needed. Lightspeed Research's thorough panelist prescreening process and large global respondent pool delivers business-ready results fast and cost-effectively. Through advanced research technologies, proven methodologies and market research expertise, it meets the industry's demand for deeper quantitative and richer qualitative data in a single, trusted partner. (See advertisement on p. 87)



Intelligence from knowledge.™

Luth Research

San Diego, CA
 Ph. 800-465-5884 or 619-234-5884
 marketing@luthresearch.com
 www.luthresearch.com
 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.

Market Decisions Corporation

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

Market Reader Pro

Fogelsville, PA
 Ph. 610-366-7918 or 866-809-5420
 info@marketreaderpro.com
 www.marketreaderpro.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Market Reader Pro™ Consumers (worldwide, mostly US)
 Size: 160,000 Type: Online



www.MDLinx.com/MR

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- Korea
- G5
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WASHINGTON DC



M3 Germany/Medquarter
MUNICH

A Sony Communication Network
 Group Company



M3 Japan/M3
TOKYO



M3 Korea/Medigiate
SEOUL

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But you will. In fact, you can reach Jack and millions of our other pre-screened panel members worldwide. Lightspeed Research thoroughly screens all of our online panelists for incredibly precise, fast and cost-efficient targeting. And since we collect thousands of in-depth data points, we can survey even your most specific and hard-to-find target audience.



Our online research panels deliver the insights that drive the world's most powerful brands. Lightspeed Research combines our global online panels with comprehensive services like survey design, sample management, survey programming, hosting, and data collection. All backed by our industry-leading respondent validation and data quality checks.

Connect with Jack and over 3,500,000 consumers worldwide at www.lightspeedresearch.com | 908-630-0542




Marketing Systems Group

Fort Washington, PA
Ph. 800-336-7674 or 215-653-7100
info@m-s-g.com
www.m-s-g.com
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. 83)


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 software and services for enterprise feedback management and market research. 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 CustomerSat™, MarketTools.com™, TrueSample®, Zoomerang®, ZoomPanel® and ZoomPanel Tech™.

MarketVibes, Inc.

Kokomo, IN
Ph. 765-459-9440
lisa@market-vibes.com
www.market-vibes.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
i-Vibes Office Furniture Panel
Size: 2,000 Type: Mail, Telephone, Online

MarketVision Research®

Cincinnati, OH
Ph. 513-791-3100
info@mv-research.com
www.mv-research.com
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
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 China
Size: 559,556 Type: Online
MDLinX Online Physician Community Europe Plus
Size: 30,855 Type: Online
MDLinX Online Physician Community Japan
Size: 316,113 Type: Online
MDLinX Online Physician Community Korea
Size: 58,444 Type: Online
MDLinX Online Physician Community USA
Size: 100,000 Type: Online

MDLinX, a SONY Group company, provides global online physicians and health care panels, offering unmatched reach in the U.S., Japan, China Germany and Korea with more than 1 million verified doctors. MDLinX has partner agreements in another 60 countries. Using our patented and highly-specialized invitation control technology, MDLinX targets 747 sub-specialties of health care professionals. MDLinX uses a triple-verification process and patented technology guarding against online fraud and duplication. For one-stop, fast turnaround, feasibility and pricing: marketresearch@mdlinc.com
(See advertisement on p. 86)

Medimix International

Medimix-Fieldaccess
Miami, FL
Ph. 305-573-5233 or 888-MEDIMIX
bizdev@medimix.net
www.medimix.net
Proprietary Panel Mgmt.: Yes
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
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 p. 89)

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

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: 400,000 Type: Online
mo'web GmbH Consumer Panel
Size: 1,200,000 Type: Online
mo'web GmbH IT Panel
Size: 250,000 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

MyPoints.com, Inc.

San Francisco, CA
Ph. 415-829-6171
marketresearch@mypointscorp.com
www.mypointscorp.com
Panel Titles:
MyPoints Automotive Panel
Type: Online
MyPoints B2B/IT Panel
Type: Online
MyPoints Consumer Panel
Type: Online

Nextplora S.p.a.

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

NJW Research

Poughkeepsie, NY
Ph. 845-471-7445
gerry.w@njwresearch.com
www.njwresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Insights Panels
Size: Client Specific Type: Online

Nooro Online Research

Barrie, ON Canada
Ph. 705-792-2701
shane@nooro.com
www.nooro.com
Proprietary Panel Mgmt.: Yes

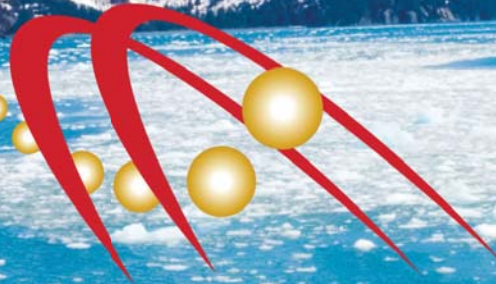
NovaTest

Paris, France
Ph. 33-1-43-55-29-29
vterratot@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

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jmace@mcmillionresearch.com

800-969-9235





Olson Research Group, Inc.
 Warminster, PA
 Ph. 267-487-5500
 info@olsonresearchgroup.com
 www.olsonresearchgroup.com
 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
OMI Online Market Intelligence
 Moscow, Russia
 Ph. 00 7 499 978 5139
 rfp@omirussia.ru
 www.omirussia.ru/en/
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 B2B IT Panel Russia
 Size: 15,388 Type: Online
 B2C Automotive Panel Russia
 Size: 86,673 Type: Online
 B2C Panel Baltic States (Lithuania, Latvia, Estonia)
 Size: 9,330 Type: Online
 B2C Panel Belarus
 Size: 7,363 Type: Online
 B2C Panel Kazakhstan

Size: 5,669 Type: Online
 B2C Panel Russia
 Size: 271,570 Type: Online
 B2C Panel Ukraine
 Size: 52,224 Type: Online
 Physician Panel Russia
 Size: 5,004 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 350,000 consumers, 85,000 vehicle owners, 15,000 IT professionals and 5,000 physicians recruited from a wide variety of local Web-portals. Our panels are in full compliance with ESOMAR and CASRO standards; advanced quality control procedures have been implemented and response rates are as high as 50%. We provide questionnaire translation, survey programming, coding and crosstabulation and recruiting proprietary panels in Russia and CIS countries. (See advertisement on p. 90)

OnCampus Research
 Oberlin, OH
 Ph. 440-775-7777 or 800-622-7498
 info@oncampusresearch.org
 www.oncampusresearch.com
 Panel Titles:
 OnCampus Student Panel
 Size: 11,200 Type: Online



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 crosstabulation. 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. 47)



Opinionology
 Orem, UT
 Ph. 801-373-7735
 contact@opinionology.com
 www.opinionology.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Opinion Outpost ePanel
 Type: Online

Opinionology is the global leader in survey research data collection. We gather answers from consumers and professionals which are then used by business and government to increase understanding and improve our world. Since 1987, Opinionology's unique combination of research expertise, operational excellence and innovative technology has delivered unparalleled value. Opinionology maintains online panels across North America and Europe with a network of modern telephone centers in the U.S. and the Philippines. We also provide data processing, questionnaire programming, survey Web hosting and research consultation. (See advertisement on p. 56, p. 57)

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

Outsource Research Consulting
 Aptos, CA
 Ph. 877-672-8100
 contactus@orconsulting.com
 www.orconsulting.com
 Proprietary Panel Mgmt.: Yes

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350k+

Automotive:
75k+

B2B IT:
15k+

Physicians:
5k+ **NEW!**



www.omirussia.ru/en
 rfp@omirussia.ru



Panel Direct
 (formerly Focus Forward Online)
 Fort Washington, PA
 Ph. 215-367-4000
 bparker@paneldirectonline.com
 www.paneldirectonline.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Focus Forward Online Panel
 Size: 500,000 Type: Online

Panel Direct (formerly Focus Forward Online) provides high-quality B2B, B2C, patients and medical professional panelists for all types of research since 2003. Our double opt-in panel is the first choice for all U.S.-based studies where targeting and robust responses are a key element of the research. Providing high-value audiences, we collect hundreds of data points and get right to the perfect research participant with speed and accuracy. Panel Direct offers unique services including mixed-mode panel recruitment, physical-address validation, dedicated project management and high-quality sample. (See advertisement on p. 49)

Peanut Labs
 San Francisco, CA
 Ph. 425-391-5476
 sales@peanutlabs.com
 www.peanutlabs.com
 Panel Titles:
 Social Media Canada Sample (13-65 Yrs Old)
 Size: 245,900 Type: Online
 Social Media Teens Sample - UK (13-17 Years Old)
 Size: 19,300 Type: Online
 Social Media Teens Sample - US (13-17 Years Old)
 Size: 675,800 Type: Online
 Social Media Teens Sample Canada (13-17 Years Old)
 Size: 34,420 Type: Online
 Social Media UK Sample (13-65 Years Old)
 Size: 214,800 Type: Online
 Social Media US Sample (13-65 Years Old)
 Size: 3,379,000 Type: Online

Pearson, S.A. de C.V.
 Mexico City, DF Mexico
 Ph. 52-55-5531-5560 or 52-55-5531-5324
 pearson@pearson-research.com
 www.pearson-research.com
 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
 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

Physicians Consulting Network
 Mt. Arlington, NJ
 Ph. 800-241-2953
 info@pcnsurveys.com
 www.pcnsurveys.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Physicians Consulting Network
 Size: 83,500 Type: Mail, Online

Precision Research Inc.
 Glendale, AZ
 Ph. 602-997-9711
 jmuller@precisionresearchinc.com
 www.precisionresearchinc.com
 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

Public Opinions Inc.
 Ottawa, ON Canada
 Ph. 613-595-1234
 info@publicopinions.com
 www.publicopinions.com
 Panel Titles:
 Opinions Publiques-Canadian Consumer Panel(French)
 Size: 85,000 Type: Online
 Public Opinions-Canadian Consumer Panel (English)
 Size: 175,000 Type: Online

Pulse Group
 Kuala Lumpur, Malaysia
 Ph. 603-2167-6666
 info@pulse-group.com
 www.pulse-group.com
 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
 Proprietary Panel Mgmt.: Yes

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 214.239.3939

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- HISPANIC PANELS
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- OVER 400 SEGMENTATION VARIABLES
- 22 MILLION+ ONLINE PANELISTS IN OVER 50 COUNTRIES
- CONSUMERS AND B2B
- MULTI-PANEL SOLUTION
- PROGRAMMING TO ANALYSIS AS NEEDED

**Radius Global**

New York, NY
Ph. 212-633-1100
clister@radius-global.com
www.radius-global.com
Proprietary Panel Mgmt.: Yes
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 U.S., 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)

**Reckner Healthcare (JRA)**

Montgomeryville, PA
Ph. 215-822-6220
sphillippe@reckner.com
www.reckner.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
MCO/PBM Payer Panel
Size: 100+ Type: Telephone, Online
Reckner Healthcare Allied Professionals Panel
Size: 200,000+ Type: Telephone, Online
Reckner Physicians Panel
Size: 300,000+ Type: Telephone, 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 Healthcare 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.
(See advertisement on p. 93)

**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 turn-around, flexible pricing and accountability to do what we say we are going to do.
(See advertisement on p. 91)

**Research Now**

Plano, TX
Ph. 888-203-6245
info@researchnow.com
www.e-rewardsresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
e-Rewards OpinionPannels
Type: Online
Valued Opinion Panels
Type: Online

Research Now is the leading global online sampling and online data collection company. Recognized for delivering high-quality online sample data, Research Now provides research firms with high-quality panelists, enabling them to interact with real consumers and business decision makers. Research Now operates the Valued Opinions™ Panel and the industry's first and best by invitation-only panel - the e-Rewards® Opinion Panel. With staff located in 21 offices around the globe and recognized for three consecutive years as the industry leader in client satisfaction, Research Now operates opinion panels in 37 countries.
(See advertisement on p. 95)

Research Results, Inc.

Fitchburg, MA
Ph. 978-345-5510
info@researchresults.com
www.researchresults.com
Proprietary Panel Mgmt.: Yes

ResearchByNet

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

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

Resonance Insights

Salem, MA
Ph. 978-740-4474
information@resonanceinsights.com
www.resonanceinsights.com
Panel Titles:
iPhone/iPad Respondents
Type: Telephone, Online
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
Proprietary Panel Mgmt.: Yes
Panel Titles:
Momconnection.com
Size: 6,000 Type: Online
moneymatterspanel.com
Size: 7,000 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 visit www.rsginc.com/panel-capabilities.

RestaurantInsights.com

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

RNB Research

Noida (U.P.), India
Ph. 91-11-2546-1415
info@rnbresearch.com
www.rnbresearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
RNB 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
Proprietary Panel Mgmt.: Yes
Panel Titles:
RONIN Healthcare 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
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
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!

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Contact Jeff Histan: phone +1 215 822 6220
email jhistan@reckner.com | www.reckner.com

Shifrin-Hayworth

Southfield, MI
Ph. 248-223-0020 or 800-559-5954
research@shifrin-hayworth.com
www.shifrin-hayworth.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
National Database - USA
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
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
Proprietary Panel Mgmt.: Yes
Panel Titles:
Kidscom Club
Size: 800,000 Type: Online
SpectraCom Research Panel
Size: 25,000 Type: Online



Survey Sampling International

Survey Sampling International

Shelton, CT
Ph. 203-567-7200
info@surveysampling.com
www.surveysampling.com/
Proprietary Panel Mgmt.: Yes
Panel Titles:
Surveyspot.com (USA)
Type: Online
www.Asiktstorget.se (Sweden)
Type: Online
www.befr.choozz.be (Belgium French)
Type: Online
www.choozz.be (Belgium Dutch)
Type: Online
www.choozz.co.uk (UK)
Type: Online
www.choozz.com (USA)
Type: Online
www.choozz.de (Germany)
Type: Online
www.choozz.dk (Denmark)
Type: Online
www.choozz.es (Spain)
Type: Online
www.choozz.fr (France)
Type: Online
www.choozz.it (Italy)
Type: Online
www.choozz.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.Mirmnenij.ru (Russia)
Type: Online
www.Mondodipinione.it (Italy)
Type: Online
www.nl.choozz.com (Netherlands)
Type: Online
www.no.choozz.com (Norway)
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.nz (New Zealand)
Type: Online
www.Opinionworld.co.uk (UK)
Type: Online
www.Opinionworld.com (USA)
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

Survey Sampling International (SSI) is the premier global provider of sampling solutions for survey research. SSI reaches respondents in 72 countries via Internet, telephone and mobile/wireless. Client services include questionnaire design consultation; programming and hosting; and data processing. SSI serves more than 2,000 clients worldwide, including 48 of the top 50 research organizations. Founded in 1977, SSI has an international staff of 430+ people representing 50 countries and 36 languages. The company has offices in Beijing, Frankfurt, London, Los Angeles, Madrid, Mexico City, Paris, Rotterdam, Seoul, Shanghai, Shelton (Conn.), Singapore, Stockholm, Sydney, Timisoara (Romania), Tokyo and Toronto, with additional representatives in Hong Kong.
(See advertisement on back cover)

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 Australia (West Perth)

West Perth, WA Australia
Ph. 61-8-9321-5415
jennifer.chhatlani@synovate.com
www.synovate.com
Panel Titles:
The Buzz

Synovate USA (Chicago)

Chicago, IL
Ph. 312-526-4000
jennifer.chhatlani@synovate.com
www.synovate.com
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

Team Vier b.v.

Amstelveen, Netherlands
Ph. 31-20-645-53-55
info@teamvier.nl
www.teamvier.nl
Proprietary Panel Mgmt.: Yes
Panel Titles:
Team Vier CATI Panel
Size: 12,000 Type: Telephone,
Team Vier WAPI Panel
Size: 8,000 Type: Online

**Think Virtual Fieldwork**

Palm Beach, FL
Ph. 212-699-1901
ray@thinkvirtuafieldwork.com
www.thinkvirtuafieldwork.com
Proprietary Panel Mgmt.: Yes

At Think Virtual Fieldwork we are dedicated to providing high-quality, online data collection services, including sample management, hosting and programming, online data delivery and superior customer service. When you work with Think Virtual Fieldwork you choose which services are right for you. Think Virtual Fieldwork delivers them to you promptly and professionally. We can help make your life easier. Think smart, think fast, think Virtual Fieldwork!

**Tiburon Research**

Moscow, Russia
Ph. 7-495-663-1525
ask@tiburon-research.ru
www.tiburon-research.ru
Panel Titles:
Tiburon Automotive Panel Russia
Size: 90,000 Type: Online
Tiburon B2C Panel Russia
Size: 190,000 Type: Online
Tiburon IT Panel Russia
Size: 4,000 Type: Online
Tiburon Moms with Children 0-14 y.o. Russia
Size: 42,000 Type: Online

Tiburon Research is a Moscow-based field and tab company dedicated to high-quality online fieldwork in Russia and Ukraine. We have highly-profiled and extremely-efficient proprietary panels and a time-proved network of sample partners to address your needs. We will also be happy to support you with translation and localization, scripting and hosting, coding and data processing. And, yes, we are researchwise.

TNS AP MEA International Research Centre

Wan Chai, Hong Kong
Ph. 852-2116-8888
office.hk@tns-global.com
www.tns-global.com.hk
Proprietary Panel Mgmt.: Yes
Panel Titles:
6th dimension™ Access Panels Australia
Size: 539,000 Type: Online
6th dimension™ Access Panels China
Size: 110,000 Type: Online
6th dimension™ Access Panels Hong Kong
Size: 40,000 Type: Online
6th dimension™ Access Panels Japan
Size: 50,000 Type: Online
6th dimension™ Access Panels Korea
Size: 76,000 Type: Online
6th dimension™ Access Panels Malaysia
Size: 20,000 Type: Online
6th dimension™ Access Panels New Zealand
Size: 132,000 Type: Online
6th dimension™ Access Panels Saudi Arabia
Size: 11,000 Type: Online
6th dimension™ Access Panels Singapore
Size: 21,000 Type: Online
6th dimension™ Access Panels Taiwan
Size: 200,000 Type: Online
6th dimension™ Access Panels Thailand
Size: 22,000 Type: Online
6th dimension™ Access Panels United Arab Emirates
Size: 10,000 Type: Online



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Toluna
 Wilton, CT
 Ph. 203-834-8585 or 866-296-3049
 Toluna@toluna.com
 www.toluna-group.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Ailment Sufferers Panel
 Type: Online
 Automotive Panel
 Type: Online
 B2B/IT Panel
 Type: Online
 Cosmetic Panel
 Type: Online
 Entertainment Panel
 Type: Online
 Finance Panel
 Type: Online
 Food and Beverage Panel
 Type: Online
 Green Consumer Panel
 Type: Online
 Home Improvement Panel
 Type: Online
 Household Technology Panel
 Type: Online
 Leisure Activities Panel
 Type: Online
 Media Panel
 Type: Online
 Mobile Panel
 Type: Online
 Moms and Babies Panel
 Type: Online
 Physicians Panel
 Type: Online
 Shopping Panel
 Type: Online
 Sports Panel
 Type: Online
 Teen Panel
 Type: Online
 Video Gamers Panel
 Type: Online

Toluna, now including Greenfield Online, is the world's largest online sample provider, delivering sample of unrivalled reliability and representation from over 4 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. 27)

TouchstoneResearch.com
 Branford, CT
 Ph. 203-483-4301
 info@touchstoneresearch.com
 www.TouchstoneResearch.com
 Proprietary Panel Mgmt.: Yes

TripleScoop Market Intelligence
 Castle Rock, CO
 Ph. 303-325-6705 or 214-499-6991
 tk@thetriplecoop.com
 www.thetriplecoop.com
 Proprietary Panel Mgmt.: Yes

Untiedt Research GmbH
 45529 Hattigen
 Germany
 Ph. 02324-98-33-91
 info@untiedt.de
 www.untiedt.de
 Panel Titles:
 HandwerkerTrend: Plumber Panel
 Size: 300 Type: Online
 MediTrend: Physician Panel
 Size: 400 Type: Online
 Untiedt Research Consumer WebPanel France
 Size: 15,000 Type: Online
 Untiedt Research Consumer WebPanel Germany
 Size: 69,000 Type: Online
 Untiedt Research Consumer WebPanel Poland
 Size: 23,000 Type: Online
 Untiedt Research Consumer WebPanel Russia
 Size: 29,000 Type: Online
 Untiedt Research Consumer WebPanel Spain
 Size: 14,000 Type: Online
 Untiedt Research Consumer WebPanel UK
 Size: 31,000 Type: Online
 Untiedt Research Consumer WebPanel USA
 Size: 51,000 Type: Online



uSamp™ (United Sample, Inc.)
 Encino, CA
 Ph. 818-524-1218
 sales@usamp.com
 www.usamp.com
 Panel Titles:
 uSamp™
 Size: 3,100,000 Type: Online

uSamp™ is one of the world's fastest-growing technology and online sample companies, providing global survey panelists and an innovative sampling platform for use in market research. uSamp now has 145 team members worldwide. The company's Web-based panel platform is transforming the management and delivery of online panel for market researchers. uSamp's deep well of proprietary and cutting-edge technologies include SampleMarket™, PanelNet™, PanelShield™, Opinion Place® River and real-time Panel Book Search. uSamp is based in Los Angeles, with offices in Dallas, Conn., London and New Delhi.
 (See advertisement on p. 23)

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
 dhunt@vernonresearch.com
 www.vernonresearch.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Vernon Research Opinion Panel
 Size: 4,500 Type: Online

Virtual Surveys Ltd.
 Manchester, United Kingdom
 Ph. 44-161-242-1100
 info@virtualsurveys.com
 www.virtualsurveys.com
 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
 Proprietary Panel Mgmt.: Yes

Vovici Corporation
 Herndon, VA
 Ph. 800-787-8755
 sales@vovici.com
 www.vovici.com
 Proprietary Panel Mgmt.: Yes

Western Wats
 See Opinionology
 (See advertisement on p. 56, p. 57)



WorldOne
 New York, NY
 Ph. 212-358 0800
 info@worldone.com
 www.worldone.com
 Panel Titles:
 WorldOne's Global Dentist Panel
 Size: 16,875 Type: Online
 WorldOne's Global Nurse Panel
 Size: 50,000 Type: Online
 WorldOne's Global Pharmacists Panel
 Size: 42,250 Type: Online
 WorldOne's Global Physician Panel
 Size: 377,500 Type: Online
 WorldOne's Global Veterinarian Panel
 Size: 15,000 Type: Online

WorldOne is the market leader in global health care fieldwork known for its dedicated and verified research panel consisting of over 500,000 medical professionals spanning 80 countries including the 30 largest global health care markets. WorldOne's dedicated team of client directors and research executives are specialists in health care research. Their expertise combined with WorldOne's expansive reach offer clients a comprehensive array of both quantitative and qualitative research capabilities.
 (See advertisement on inside back cover)



Yahoo! Maktoob Research
 Dubai, United Arab Emirates
 Ph. 971-4-445-6200
 researchinfo@yahoo-inc.com
 www.maktoob-research.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 Arab Eye
 Size: 1,400,000 Type: Online

Yahoo! Maktoob Research combines the largest online consumer panel in the Middle East and North Africa (such as Saudi Arabia, Egypt, Jordan, UAE) with the latest in international online research standards. Yahoo! Maktoob Research not only provides full project support to its clients via survey programming, translations and sampling, but also the complete research package from survey development to analysis and reporting. An online research portal can be made available for the full package. Yahoo! Maktoob Research has developed proprietary research software that allows for building questionnaires easily and fast.
 (See advertisement on p. 37)

YouGov Zapera
 DK-2200 Copenhagen, Denmark
 Ph. 45-70-27-22-24
 info@yougov.dk
 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

YouGovPolimetrix
 Palo Alto, CA
 Ph. 650-462-8000
 sales@polimetrix.com
 www.polimetrix.com
 Panel Titles:
 YouGov PollingPoint
 Size: 1,500,000 Type: Online

Zoomerang
 See MarketTools Inc.

African-American

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 African-American Consumer, The, ACNielsen p. 78
 Clear Voice Surveys, Clear Voice Research, LLC p. 79
 ClickIQ Consumer Panel, ClickIQ p. 79
 Concept Development, Insight Counts p. 84
 Consumer Directions, KL Communications, Inc. p. 84
 Consumer Research, Insight Counts p. 84
 Customer Satisfaction, Insight Counts p. 84
 E-Poll Consumer Panel, E-Poll Market Research p. 82
e-Rewards U.S. Online Panels, Research Now p. 92
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 82
 eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 82
 eSample Specialty Panels, eSample Solutions p. 82
 eSample Youth & Teens, eSample Solutions p. 82
Esearch Children/Teens Panel, Esearch.com, Inc. p. 82
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 82
 Ethnographic Research, Insight Counts p. 84
Focus Forward Online Panel, Panel Direct p. 91
 Focus Groups, Insight Counts p. 84
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 82
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 82
 Focus World Ethnic Panel, Focus World International, Inc. p. 82
GMI African-American Panel, GMI (Global Market Insite, Inc.) p. 84
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 Harris Poll Online, Harris Interactive® p. 84
 Healthcare Professionals Worldwide, Medimix International p. 88
 Home Use Tests, Insight Counts p. 84
Know More™ Internet Panel, Radius Global p. 92
 KnowledgePanel®, Knowledge Networks p. 86
 MarketTools ZoomPanel, TrueSample-certified, MarketTools, Inc. p. 88
 Mars General Consumer Panel, Mars Research p. 88
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Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 88
Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 88
Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 88
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 MyPoints Consumer Panel, MyPoints.com, Inc. p. 88
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SurveySpot.com (USA), Survey Sampling International p. 94
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 Synovate Financial Panel, Synovate USA (Chicago) p. 94
 Synovate Global Opinion Panels-North America, Synovate USA (Chicago) p. 94
 Synovate Health Conditions Panel, Synovate USA (Chicago) p. 94
 Synovate Technology Panel, Synovate USA (Chicago) p. 94
 Synovate Travel & Leisure Panel, Synovate USA (Chicago) p. 94
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Asians

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 ClickIQ Consumer Panel, ClickIQ p. 79
 Concept Development, Insight Counts p. 84
 Consumer Directions, KL Communications, Inc. p. 84
 Consumer Research, Insight Counts p. 84
 Consumer Research Panel, The, CRC Research p. 79
 Customer Satisfaction, Insight Counts p. 84
 Embrain Panel, Embrain Co., Ltd. p. 80
 E-Poll Consumer Panel, E-Poll Market Research p. 82
e-Rewards U.S. Online Panels, Research Now p. 92
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 82
 eSample Healthcare Patient Panel (U.S./Canada), eSample Solutions p. 82
 eSample International Panel (200+ Countries), eSample Solutions p. 82
 eSample Specialty Panels, eSample Solutions p. 82
 eSample Youth & Teens, eSample Solutions p. 82
Esearch Children/Teens Panel, Esearch.com, Inc. p. 82
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 82
 Ethnographic Research, Insight Counts p. 84
Focus Forward Online Panel, Panel Direct p. 91
 Focus Groups, Insight Counts p. 84
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 82

Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 82
 G.L.A. Japanese House Panel, G.L.A. Intercultural Marketing and Communication p. 82
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 84
 Harris Poll Online, Harris Interactive® p. 84
 Healthcare Professionals Worldwide, Medimix International p. 88
 Home Use Tests, Insight Counts p. 84
 Interface Asia Consumer, InterfaceAsia p. 84
 InterfaceAsia B2B / IT, InterfaceAsia p. 84
 InterfaceAsia Medical (Physician), InterfaceAsia p. 84
Know More™ Internet Panel, Radius Global p. 92
Maktoob Research Panel, Yahoo! Maktoob Research p. 96
 MarketTools ZoomPanel, TrueSample-certified, MarketTools, Inc. p. 88
Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 88
Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 88
Mindfield Health/Beauty Aids Brand Panel, Mindfield Online Internet Panels p. 88
Mindfield Pet Owner Panel, Mindfield Online Internet Panels p. 88
Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 88
Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 88
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 MyPoints Consumer Panel, MyPoints.com, Inc. p. 88
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SurveySpot.com (USA), Survey Sampling International p. 94
 Synovate Automotive Panel, Synovate USA (Chicago) p. 94
 Synovate Financial Panel, Synovate USA (Chicago) p. 94
 Synovate Global Opinion Panels-North America, Synovate USA (Chicago) p. 94
 Synovate Health Conditions Panel, Synovate USA (Chicago) p. 94
 Synovate Technology Panel, Synovate USA (Chicago) p. 94
 Synovate Travel & Leisure Panel, Synovate USA (Chicago) p. 94
 TSN Ethnic Panel, The Sample Network p. 92
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Children

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B2C Panel Kazakhstan, OMI Online Market Intelligence p. 90
B2C Panel Russia, OMI Online Market Intelligence p. 90
B2C Panel Ukraine, OMI Online Market Intelligence p. 90
 Canadian Consumer Panel, ResearchByNet p. 92
 Childresearch.com Panel, ChildResearch.com p. 79
 China Consumers, ePanel Co., Ltd. p. 82
 China Consumers, ePanel Co., Ltd. p. 82
 Clear Voice Surveys, Clear Voice Research, LLC p. 79
 ClickIQ Consumer Panel, ClickIQ p. 79
 Concept Development, Insight Counts p. 84
 Consumer Directions, KL Communications, Inc. p. 84
 Consumer Research, Insight Counts p. 84
 Customer Satisfaction, Insight Counts p. 84
 E-Poll Consumer Panel, E-Poll Market Research p. 82
 eSample Consumer Panel (U.S./Canada), eSample Solutions p. 82
 eSample Hispanics, eSample Solutions p. 82
 eSample International Panel (200+ Countries), eSample Solutions p. 82
 eSample Youth & Teens, eSample Solutions p. 82
Esearch Children/Teens Panel, Esearch.com, Inc. p. 82
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 82
 Ethnographic Research, Insight Counts p. 84
Focus Forward Online Panel, Panel Direct p. 91
 Focus Groups, Insight Counts p. 84
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 82
 Focus World Ethnic Panel, Focus World International, Inc. p. 82
GMI Consumer Panel, GMI (Global Market Insite, Inc.) p. 84
GMI Youth Panel, GMI (Global Market Insite, Inc.) p. 84
 Harris Poll Online, Harris Interactive® p. 84
 Home Use Tests, Insight Counts p. 84
 Interface Asia Consumer, InterfaceAsia p. 84
 Kidscom Club, SpectraCom, Inc. p. 94
KidzEyes.com, C&R Research Services, Inc. p. 78
Know More™ Internet Panel, Radius Global p. 92
 MarketTools ZoomPanel, TrueSample-certified, MarketTools, Inc. p. 88
Mindfield Electronics/Gaming Panel, Mindfield Online Internet Panels p. 88
Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 88
Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 88
Mindfield Health/Beauty Aids Panel, Mindfield Online Internet Panels p. 88
Mindfield Mothers-Children Panel, Mindfield Online Internet Panels p. 88

Mindfield Travel and Leisure Panel, Mindfield Online Internet Panels p. 88**Mindfield Vision Care Panel, Mindfield Online Internet Panels p. 88**

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My View U.S. Consumer Panel, Authentic Response, Inc. p. 78

MyPoints Consumer Panel, MyPoints.com, Inc. p. 88

National Database-USA, Shiffrin-Hayworth p. 94

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Product Testing Research, Insight Counts p. 84

Reader Panels-Publication Specific-Customised, Signet Research, Inc. p. 94

ReRez Consumer Panel, ReRez p. 92

Sample Czar Patients / Find A Cure Panel, Sample Czar, Inc. p. 92

SurveySavvy, Luth Research p. 86

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Featured Event



Research Now will hold a Webinar, themed “Demanding More - Raising the Standard for Physician Data Quality,” on November 17 at 1 p.m. CST. For more information and to register visit <https://quirks.webex.com/quirks/onstage/g.php?t=a&d=667676693>.

ESOMAR will hold its 2010 conference on innovation on **November 14-16** in Barcelona, Spain. For more information visit www.esomar.org.

The Society of Insurance Research will hold its annual conference and exhibit fair on **November 14-17** in Jacksonville, Fla. For more information visit www.sirnet.org.

ESOMAR will hold its qualitative research conference, themed “Foresight on Moods and Thoughts,” on **November 16-18** in Barcelona, Spain. For more information visit www.esomar.org.

The Japan Marketing Research Association will hold its annual conference on **November 25-26** at the Westin Tokyo. For more information visit www.jmra-net.or.jp/pdf/conference2010.pdf.

The Merlien Institute will hold a conference, themed “Market Research in the Mobile World 2010: The Next Frontier,” on **December 2-3** in Berlin, Germany. Use code QUIRKS20 when registering to save 20 percent off standard rates. For more information visit www.merlien.org/upcoming-events/mrmw2010.html.

Gartner will hold its business intelligence summit, themed “Building the ‘Business’ in BI: Plan, Platform, People, Performance,” on **January 31-February 1** at Park Plaza Westminster Bridge in London. For more information visit www.gartner.com.

The Marketing Research Association will hold its annual CEO summit on **February 16-18** in Phoenix. For more information visit www.mra-net.org.

ESOMAR will hold its 2011 consumer insights conference, themed “A New World Order In

Shopper Marketing,” on **February 27-March 1** in Brussels, Belgium. For more information visit www.esomar.org.

ESOMAR will hold its annual Asia-Pacific conference, themed “Increasing Value Through Simplicity,” on **March 20-22** in Melbourne, Australia. For more information visit www.esomar.org/apac.

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on **March 21-23** 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 22-23** at the Grange St. Paul’s Hotel in London. For more information visit www.research-live.com/research2011.

SymphonyIRI will hold its annual summit on **March 28-30** at the Fontainebleau Miami Beach Resort and Spa in Miami. For more information visit <http://cpgsummit.com>.

The Pharmaceutical Marketing Research Group will hold its annual national conference on **March 27-29** at JW Desert Ridge in Phoenix. For more information visit www.pmr.org.

IIR will hold a conference focused on design and culture and brand identity and packaging on **April 11-13** in Chicago. For more information visit www.iirusa.com/fuse.

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.



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Best Practices Act poses real danger to research

I received a call in late September from Howard Fienberg, director of government affairs for the Marketing Research Association. He was interested in submitting an article about the threat to marketing research posed by a federal data privacy bill that was introduced earlier this summer. We were prepping the November issue and I told him that if he could get the article completed in a few days, I would try my hardest to wedge it into the November issue.

As he has in the past, Fienberg nailed the deadline and submitted an outstanding 2,000-word piece. The trouble is, the only available real estate in this issue ended up being right here in my Trade Talk column, and my allotted space usually maxes out at around 1,300 words.

So we're going to do something a bit unusual here.

The article frankly scared the heck out of me and as the bill is something the entire industry should be aware of, rather than wait until the December issue to publish the story, I'm going to offer up excerpts from Fienberg's article below, as many as space will allow, and then we will publish the entire article in the November 8 edition of our e-newsletter.

As introduced by Rep. Bobby L. Rush (D-Ill.) the Best Practices Act (H.R. 5777) is a comprehensive federal data privacy bill that, if enacted into law in its current form, would fundamentally alter the business and conduct of

research in the United States, increasing regulatory compliance costs and potentially crippling all but the very largest marketing research companies (who are more likely to be able to meet the bill's requirements using preexisting resources).

This bill is the most significant federal legislation affecting the marketing research industry now visible on the horizon. While it does not appear to have been written ostensibly to regulate marketing research companies, its language can reasonably be interpreted as likely to achieve exactly that purpose.

All uses of data

The stated goal of the Best Practices Act is, "To foster transparency about the commercial use of personal information, provide consumers with meaningful choice about the collection, use, and disclosure of such information, and for other purposes." Although the bill's stated concern is the "commercial" use of data, it actually focuses on all uses of data, including research purposes. Also, while most media coverage discussed the Act in terms of online privacy, it actually applies to collection, use and transfer in any medium or mode (including telephone, mail, in-person, mobile and online).

The Act would require almost all for-profit research companies and

organizations to:

- provide extensive notice of their data privacy practices to individuals;
- offer opt-out from collection or use of most information (not just personally identifiable information);
- get participants' "affirmative express consent" for collection or use of "sensitive" information (which unfortunately includes some common demographic data) or for the transfer of most information to a third party (except for service providers);
- make sure the data they keep is accurate;
- set up and maintain data security systems and processes;
- and conduct periodic privacy assessments.

H.R. 5777 would be enforced by the Federal Trade Commission (FTC), state attorneys general and private lawsuits. While the FTC has no jurisdiction over not-for-profits and governmental entities, every link in the research chain would be impacted by the Best Practices Act.

For example, the bill would be detrimental to sampling companies, precluding the ability to even provide a random-digit dial sample for anyone's use – let alone provide targeted samples for studies of a particular race or ethnicity,

general income level or religious affiliation.

Numerous concerns

The MRA has numerous concerns with the legislation, including the following elements:

“Covered” and “sensitive” information

The Act has a very stringent definition of “covered information,” which includes data as simple as someone’s name or IP address. Information designated as covered requires the researcher to give the research participant an opt-out choice for collection and use.

Moreover, the bill also delineates some common research data as “sensitive information,” such as race and income. Information designated as sensitive requires the researcher to give the respondent an opt-in choice for collection, use and transfer.

Notably, the Act grants an exception to these rules for publicly-available information, but to take advantage of that exception the researcher must make onerous background checks on the data.

Restrictions on information sharing and transfer

H.R. 5777 requires research participants’ opt-in consent in order to transfer covered or sensitive information to third parties, which would hurt most research projects, since the definitions of covered and sensitive information are so broad.

The Act does allow for transfer without an opt-in if it is to a service provider, but the definition of a service provider has been left murky.

Opt-out would be permanent

Under the Act, any research participant opting out of participating in a research study would be permanently opting out from all research studies from that company or organization. By comparison, federal regulations for telemarketers require that opt-outs last at least five years, while opt-out requests from unsolicited fax advertisements or commercial e-mail (spam) are also permanent.

The opt-out required by H.R. 5777 goes far beyond what most researchers ever offer. The infrastructure necessary to implement it would likely require maintaining and linking far more across data sets and lists than firms and organizations do now, increasing the threat of, and impact from, a data breach.

A permanent opt-out could also swiftly put research firms out of business. New firms will pop up (experienced or not) who have not already been forbidden from collecting/handling data on a large number of individuals. Alternatively, research companies may be forced to fold and reorganize under new names in order to emerge without the hindrance of an existing opt-out list.

How do you ensure an individual has actually opted in?

The Act does not define how a researcher may obtain “express affirmative consent” (opt-in) and the details would be left to the FTC’s discretion. These specifics are vital.

Providing individuals access and dispute resolution

Upon request, H.R. 5777 would require providing “an individual with reasonable access to, and the ability to dispute the accuracy or completeness of, covered information or sensitive information about that individual if such

information may be used for purposes that could result in an adverse decision against the individual, including the denial of a right, benefit or privilege.” Whether this requirement would actually apply to researchers would be up to how the FTC defines such information, since this is written so broadly.

Any such requirements would likely require complex and expensive procedural and infrastructure changes for research companies and organizations.

Notice and consent for changing privacy policies

Providing notice (and getting some form of retroactive consent) for material changes to privacy policies is now standard case law. But while notice with an opt-out is a reasonable expectation, H.R. 5777 goes further and would require express affirmative consent retroactive changes. This would make it impossible for researchers to maintain information when necessary for research purposes (unless completely de-identified or aggregated).

This would be most debilitating for online panel companies and online communities (who keep huge rosters of participants) and focus group facilities (who maintain large lists of potential participants). It would likely be impossible to get express affirmative consent from millions of people before changing a policy or practice.

Next year looks rougher

The MRA does not expect the Best Practices Act to become law this year. Next year looks rougher for the Act as introduced: with Republicans likely to take control of the House of Representatives, no version of this bill will likely move forward in the next two years.

Unfortunately, the Best Practices Act sets a marker for Congress’ interest and position on data privacy likely will be the starting point of all future discussions and debates. More importantly, it gives unofficial marching orders to a potentially eager FTC to start developing similar policies through its existing regulatory process. That is why the MRA considers the legislation a threat and is seeking researchers’ involvement in meeting with their representatives and senators to explain the detrimental impact of the Act and why it must be either amended or killed. | Q

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online and offline

News about Quirk's and quirks.com

Focus Group Facility Directory is coming up - now with video!

The December 2010 issue will again include our directory of focus group facilities. One of our largest specialty directories, it features nearly 1,000 listings across the globe and is searchable online by country/state/metro area, amenities and building location type to help research buyers find the facility that meets their needs. New this year: Listings can now include video clips, featuring virtual facility tours, focus groups in action and more. To check it out visit quirks.com/directory/focusgroup/index.aspx.



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Quirk's jumps on the blogging bandwagon

Quirks.com will soon include The Quirk's Blog at quirks.com/blogs. A few times a week Quirk's staff members will informally write about the topics we are hearing about at trade shows and from the hundreds of industry contacts we interact with each week. We hope this will help keep us connected to readers and provide our audience a better read on the industry's pulse. If there's any particular issue you'd like discussed, please submit your suggestions to info@quirks.com.



cover-to-cover

Facts, figures and insights from this month's issue



Country of residence is not a strong factor in trying to classify global shoppers into different segments. In fact, data suggest that consumers in different countries may exhibit similar shopping behavior even though they are geographically dispersed and at different stages of economic development. (page 8)



Few firms approach the survey as another way customers experience the brand, but panel managers certainly should. These are real people, who do business with your firm and they need to be treated as customers. (page 39)



In a comparison of identical twins, who share the exact same genetic makeup, and fraternal twins, who share only half of their genes (like normal siblings), it was found that a strong correlation in survey-taking existed between identical twins that did not exist between fraternal twins. (page 50)



In a face-to-face meeting, Russian respondents may well be willing to spend around an hour speaking about their business and their views on a range of issues. (page 61)



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Congratulations to September's winner, P. Linda Pacheco of Walmart International - Global eCommerce, Bentonville, Ark. The winner received a digital video camera.

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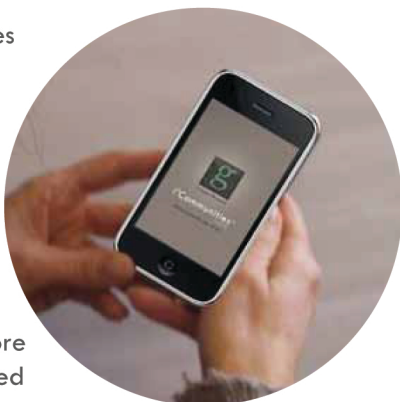
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