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Quirk's Marketing Research Review  
4662 Slater Road | Eagan, MN 55122  
651-379-6200 | [www.quirks.com](http://www.quirks.com)

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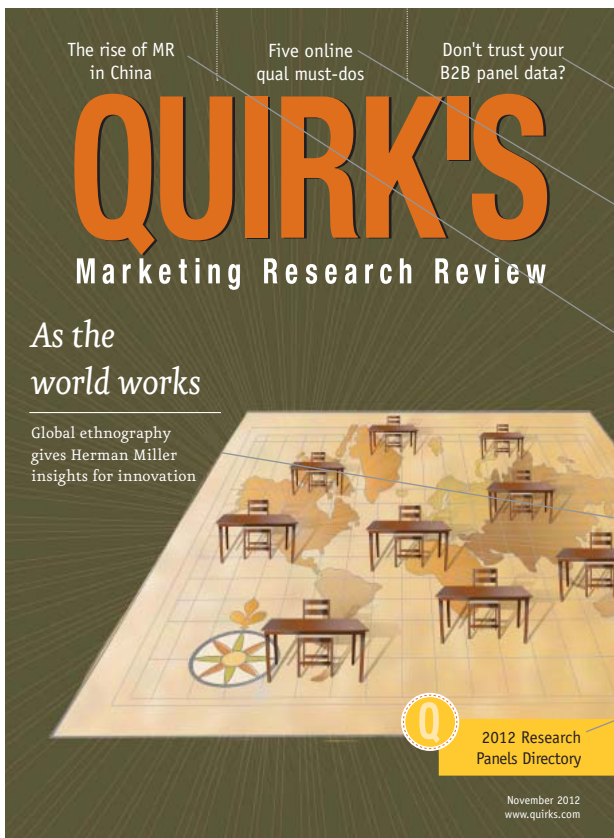
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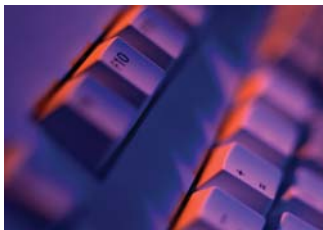
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## ••• brand research

### The secret to trading up? Visuals and comparisons

It's been several years of trading down to store brands and private-label items but consumers are not immune to being convinced to trade up with the help of clever marketing. Consumers are more willing to switch their preference from a low-status brand (e.g., Kmart camping gear) to an extension of a premium brand that isn't a natural fit for the product category (e.g., Speedo camping gear) when marketers add a picture of the product in question or allow consumers to compare brands rather than judge each brand separately, according to "The Importance of the Context in Brand Extension: How Pictures and Comparisons Shift Consumers' Focus from Fit to Quality," by Tom Meyvis of the NYU Stern School of Business, Kelly Goldsmith of the Kellogg School of Management at Northwestern University and Ravi Dhar of the Yale School of Management.

Visual cues or pictures of the product shift consumers' focus to the quality of the parent brand and away from the fit of the brand when evaluating a brand's new product offering while brand comparisons shift consumers' preference from lower-status brands (e.g., ShopRite cottage cheese) toward higher-status brands even if they aren't a good fit (e.g., Haagen-Dazs cottage cheese).

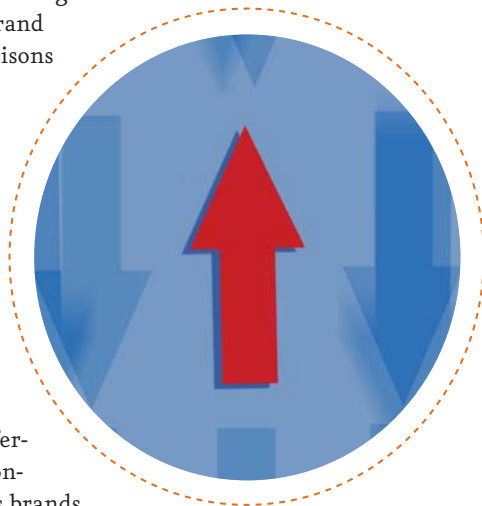
Market research studies that mimic a typical shopping environment with visual information and competing brands will reveal greater potential for high-status brand extensions. "New brand extensions are often tested in an abstract setting. For example, what would you think of a Crest facial moisturizer? In this market research context, consumers place too much emphasis on the fit between the brand and the product," says Meyvis. "As a result, companies may underestimate the value and opportunity of high-status brands extending into a wide variety of product categories."

Meyvis, Goldsmith and Dhar also recommend tactics for store managers and retailers to promote high- or lower-quality brands in their shopping environments. "A high-quality brand that is introducing a product in a category that isn't a good fit would benefit from marketing efforts that encourage brand comparisons," says Goldsmith.

"Conversely, a lower-quality brand that is introducing a new extension may benefit from shopping environments where the product is not being compared to other brands, like in an end-of-aisle display."



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## ••• crowdsourcing

### Volvo wants to see You Inside

Volvo has become the latest car company to try to tap the wisdom of crowds, using data gleaned from a new Facebook crowdsourcing app to inspire new innovations and create vehicles that are designed around people.

Dubbed You Inside: What's In Your Car Is You, the app invites Volvo fans and owners from around the world to post images of the things they keep inside their cars, along with information about their driving habits, vehicles and lifestyles.

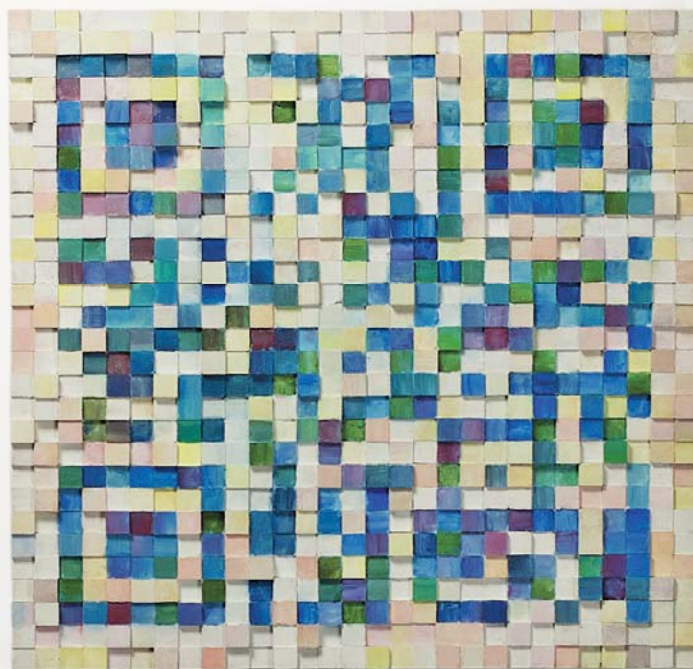
According to Volvo, "The more we learn about you, the more we can design around you." The Facebook page also promises participants that they will "find out something about yourself you didn't know."

The photos and information from the participants are uploaded to the You Analyzer, which allows Volvo to analyze the information and create a personality profile for each user based on what they keep in their cars. The app also allows users to view other You Inside profiles around the world.

The data gathered by the app on the social network will be fed into research for vehicle development at Volvo. This project comes on the heels of Volvo's 2011 brand overhaul to make its car design processes and marketing more human-oriented.



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# Pray it, don't say it

At the time of this writing, in early October, there are rumblings that Tim Tebow could unseat incumbent Mark Sanchez as the New York Jets' starting quarterback. Are we in for another round of Tebowmania?

A quick recap for the uninitiated: Tebow wears his Christian faith on his sleeve, proudly referencing it in interviews and displaying it in his now-legendary habit of kneeling to pray on the football field (resulting in the meme of all memes: Tebowing).

Now, I've never met Tebow but in the interviews I've watched and the anecdotal comments I've heard, he comes off as very genuine in his expressions of faith – which puts him in stark contrast to the legions of pro athletes who seem to sprinkle their postgame comments with references and thanks to God because they think doing so will burnish their images.

Beyond the obvious, who, exactly, are they trying to impress? Their wives and girlfriends? The owners of their teams? Potential sponsors? And for every person who appreciates their piety, how many more are turned off?

## Display how they pray

With that as a backdrop, I read with interest a press release that crossed my desk last month from Phoenix-based

Grey Matter Research on a study of Americans' reactions to athletes who display how they pray.

The firm surveyed a demographically representative sample of American adults to gauge their responses to several different types of religious expression. As taken from the press materials, they include:

Athletes from opposing teams gathering on the field or court after a game for prayer. Of those surveyed, 55 percent feel positively toward this, 32 percent don't care one way or another and 12 percent feel negatively.

Athletes speaking up about their faith in interviews after the game (such as saying, "I want to give God the glory for this"). Fifty-two percent feel positively, 29 percent don't care and 20 percent feel negatively.

An athlete making a religious sign (such as kneeling in prayer or pointing toward heaven) after making a big play: 49 percent feel positively, 34 percent don't care and 17 percent feel negatively.

Athletes suggesting that God helped them or their team accomplish something (such as saying, "God really gave me strength out there"): 43 percent feel positively, 31 percent don't care and 26 percent feel negatively.

## The wrong path

When the responses of religious Americans were isolated, it turns out they're not as positive as one might imagine toward expressions of faith among professional athletes. So, if



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Joe Rydholm can be reached at joe@quirks.com

the athletes are trying to impress other religious folks, they may be straying down the wrong path. "On average, although a majority of people who attend religious worship services have a positive reaction when pro athletes express their religious faith, about 36 percent don't react positively," said Ron Sellers, president of Grey Matter Research, in the press release. "In fact, only 37 percent say they tend to have a very positive reaction to these expressions of faith."

At the same time, Sellers noted, Americans who are not religious usually have a less-negative reaction to these public expressions of faith than might be expected. "Among Americans who have no particular religious belief or identification, on average, just 29 percent tend to react negatively to things such as on-field prayers or giving praise to God in a post-game interview, while almost as many – 23 percent – tend to react positively to this. Even among people who are atheist or agnostic, only half generally have a negative reaction to these expressions of faith, while 12 percent actually react positively and the rest don't much care."



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- Pat Masker, Senior Director of Consumer Insights at Frito-Lay



As seen at The Market Research Event 2012 in “Rethinking Consumer Panels To Drive Innovation” by Christine Haskins and Susan Robertson. <http://www.iirusa.com/research/event-home.xml>

# IN FOCUS

••• a digest of survey findings and new tools for researchers



## // Survey Monitor



••• environmental research

### Green for saving, not for spending

Enviro-conscious behaviors have gone mainstream; purchasing faces price barriers

Key aspects of “green” culture – from organic purchase to recyclability – have gone mainstream in ways few could have imagined 20 years ago. U.S. consumers are turning to digital devices for environmental learning and to share their green experiences but, at a time of slow economic recovery, paying significantly more to be environmentally friendly simply doesn’t compute for most people, according to the Green Gauge from Nuremberg, Germany, research company The GfK Group.

The Green Gauge study shows that 73 percent of U.S. consumers have pur-

chased a product made from organic materials in the past 12 months. Categories that have seen notable increases since 2007 in organic buying include food, household cleaning, apparel and pet food and supplies. Additionally, 93 percent of Americans say they have done something to conserve energy in their households in the past year and 77 percent have done something to save household water.

Digital media is helping to amplify this green awareness. Almost 30 percent of smartphone users have turned to an app in the past year to help reduce their environmental impact – a figure that jumps to 44 percent for Generation Z (ages 18 to 22) and 38 percent for Generation Y (ages 23 to 32). Most-cited types of apps used include public transportation timetables and home energy monitors. In addition, 18 percent

of consumers say that social networking sites are a major source of green information for them (up four points from 2011), with another 33 percent citing it as a minor source.

But green awareness and engagement do not necessarily translate to green purchasing. Compared to 2008, the proportion of U.S. consumers willing to pay more for environmentally-friendly alternatives has gone down in a variety of key areas, from cars that are less-polluting (down from 62 percent to 49 percent) to energy-efficient light bulbs (down from 70 percent to 60 percent).

“Green awareness is indeed pervasive – but consumers can perceive ‘green’ claims as a negative in some contexts,” says Timothy Kenyon, director for the Green Gauge survey. “For example, while terms like organic and recyclable have strong positive resonance, they are often associated with higher prices. Understanding consumers’ triggers and the limits of their commitment to green action is essential for marketers and researchers alike.”

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### Five stars for Five Guys

Why America’s favorite burger joint doesn’t need to advertise

Five Guys Burgers and Fries (Five Guys) is continuing to gain ground and fans across the country, according to a survey from Market Force Information, a Boulder, Colo., re-



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search company. In a quick-service restaurant industry survey of more than 7,600 U.S. consumers, Five Guys is the favorite burger chain.

Five Guys taking top honors proved consistent with the brand's rapid growth, as well as the popularity of its food and atmosphere. West Coast favorite In-N-Out Burger, which is also known for having passionate patrons and strong word-of-mouth buzz, ranked second among consumers. Rounding out the top five were Fuddruckers, A&W and relative-newcomer Smashburger.

Market Force first calculated the favorites based on pure number of votes and then factored in the number of locations for each chain for a more level view of the results. The results were also analyzed geographically to see which chains are most popular in various regions of the country, including the Northeast, Midwest, South and West.

When looking at the results to determine how the burger brands fared in four different regions of the country, Five Guys still dominated, ranking first in all regions. From there, the regional leaders diverged, although Fuddruckers, a relatively small chain, placed in the top four across all regions.

What factors do diners like most about their favorite burger joint? Many seem to vote with their palates rather than their wallets. Case in point, the three top-ranking burger chains – Five Guys, Smashburger and In-N-Out – all rated toward the top in key categories such as food quality/taste, friendly service and cleanliness. In fact, Five Guys received the highest marks across all of the major attributes except value, a category that was captured by In-N-Out and Whataburger.

Conversely, of the restaurants that were studied, McDonald's ranked last for food quality/taste and A&W ranked last in the remaining categories, including friendly service, value, cleanliness and atmosphere.

"Five Guys has created a cult-like brand following by excelling in the areas that matter most to its diners – high-quality food, customer service and cleanliness," says Janet Eden-Harris, chief marketing officer at Market Force. "Five Guys does zero advertising but by delivering consistently great customer experience, they're able to build a word-of-mouth buzz that continues to bring new customers through the door."

[www.marketforce.com](http://www.marketforce.com)



## ●●● customer loyalty Points toward a payday

Saving money proves top priority for loyalty card participation

Americans are participating in loyalty card programs more now than ever and the reason is not surprising, according to a survey conducted by Polaris Marketing Research Inc., Atlanta, and supported by Research Now, Plano, Texas.

Respondents were asked how many customer loyalty programs they participate in, with five or more loyalty programs being the majority. The highest-rated reason why Americans join is to save money/get discounts (93 percent).

The second highest-rated reason was for the reward offers (91 percent), confirming the demand for customers to receive some type of offer first (whether it's discounts or free stuff) before they become loyal to that specific brand or company. In fact, "I am a loyal customer to that brand/company" was the second-to-last reason for participating in a loyalty program (66 percent).

Further, when respondents were asked if having a specific brand/company loyalty card influences their decision to purchase a product or service, more than half responded that it "influences me a little" (53 percent). Men were significantly less likely to be influenced by having a specific brand/company loyalty card than women (57 percent vs. 50 percent).

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## ●●● social media research Interest in Pinterest

Pew study shows how 'creators' and 'curators' document life via photos

Photos and videos have become key social currencies online. According to a study from the Pew Internet and American Life Project, Washington,

D.C., 46 percent of adult Internet users post original photos or videos online that they have created (called creators) and 41 percent of adult Internet users take photos or videos that they have found online and repost them on sites designed for sharing images with many people (called curators).

The creator group is made up of those who have shared photos they have taken themselves (45 percent of Internet users have done that) and those who have shared videos they have created themselves (18 percent of Internet users have done that). If a person did either one of those two activities, that person was considered an online image creator.

The curator group is made up of those who have taken photos they found online and posted them on a site that is used for sharing images with others (35 percent of Internet users have done that) and those who have taken videos they found online and posted them on a video-sharing site (25 percent of Internet users have done that). If a person did either of those two activities, that person was

considered an online image curator. Overall, 56 percent of Internet users do at least one of these creating or curating activities and 32 percent of Internet users do both creating and curating activities.

This survey marked the first time that the Pew Research Center's Internet and American Life Project has asked questions about Pinterest, Instagram and Tumblr, which have made curating activities easier because they are organized for easy image- and video-sharing. The rise of smartphones is also a major part of the story because the phones' cameras make it easy to take and share pictures online.

Twelve percent of online adults say they use Pinterest, which is dominated by women. Nearly one-fifth of online women use Pinterest. Twelve percent of online adults say they use Instagram, which is dominated by young adults. Some 27 percent of the Internet users ages 18-to-29 use Instagram. Five percent of online adults say they use Tumblr. Some 11 percent of young adults use this

social blogging service.  
[www.pewinternet.com](http://www.pewinternet.com)



●●● physicians research  
**Doctors within  
 (cyber) borders**

M.D. social networking index reveals contrasting global trends

What do physicians in America, China and Russia have in common? Over 80 percent of them connect with colleagues via professional

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social networks and 95 of physicians worldwide agree that they are not interested in engaging with pharmaceutical companies via social networks. But the similarities end there, according to the M.D. Social Networking Index from San Mateo, Calif., research company Epocrates Inc. and M3 Global Research, Washington, D.C.

The Index, which aims to uncover professional social networking trends and disparities among physicians in the U.S. and internationally, showed a broad variety in using social networks professionally and motivations for using social networks for professional purposes. U.S. physicians are more insular and have less desire to use social networks to connect with their counterparts overseas (only 37 percent of American physicians compared to almost 82 percent of international physicians). American physicians' primary professional use of social networks is to connect with colleagues, conduct research and prospect for jobs. Conversely, international physicians use social networks as a tool to share knowledge and are nearly twice as likely as U.S. physicians to trust the information received. While many physicians see value in patients connecting in a virtual social environment, U.S. doctors are twice as likely as their international counterparts to recommend that patients use social support groups.

Additionally, physicians across the globe face a range of workplace rules when it comes to accessing social sites. International physicians are three times more likely to be prohibited from accessing social networks at their place of employment than their U.S. counterparts. Although most American doctors are allowed access to social networking sites in the workplace, 50 percent experience restrictions. The countries with the most flexibility in accessing social networks while on the clock are Russia and Germany, with 71 percent and 66 percent of respondents reporting no restrictions, respectively.

But ultimately, physicians want clarity from their professional social networking. Physicians need simple and transparent guidelines about professional social network usage from governing bodies and want to know

with whom they are connecting. American doctors are among the least satisfied with the social networking regulatory guidance provided by their nation's governing body. Rounding out the bottom three least-satisfied are Russia and South Africa. Most respondents agree that some form of identification should be required on professional networking sites, with more than 30 percent of U.S. physicians supporting third-party verification and one-third of international physicians advocating the use of real names.

[www.epocrates.com/medinsight](http://www.epocrates.com/medinsight)



## ●●● children The global view

Children around the world are connected, informed, concerned

The world is shrinking and kids' views and horizons are expanding. A study of kids, conducted by The Marketing Store Worldwide, a Chicago branding agency, shows that kids around the world today are surprisingly worldly and share much more in common than we may initially think.

The New Definition of Childhood Global Kids Study researched over 4,000 children ages 6-to-12 years in 12 countries (U.S., Canada, U.K., France, Germany, Spain, Poland, Brazil, Mexico, Japan, China and Australia). The online study aims to capture what it's like to be growing up in the world today through kids' own eyes and the eyes of their moms.

"Kids throughout the world increasingly see themselves as a part of a global community," says Simon Marshall, executive vice president and managing director of The Marketing Store North America. "We found that easier access to technology and information through

new media channels has helped foster a common set of experiences and values that are ringing true for most kids no matter where they are."

Global Kids are active and grounded. They are highly engaged, busy and also value learning. When shown a list of more than 30 activities, ranging from reading to camping to sports to crafts, Global Kids said on average that they participated in 25 activities. And in a world assumed to be obsessed with money and celebrity, Global Kids placed "being smart" and "getting a good education" near the top of socially desirable attributes – and in the U.S., above fame and fortune. Globally, "getting a good education" and "being rich" are close to a tie.

Global Kids are plugging in at younger ages. The vast majority of Global Kids frequently use electronic entertainment or communication devices, including digital cameras (93 percent), video-game consoles (84 percent), digital music players (78 percent) and cell phones (77 percent). And they are engaging in a wide range of activities, from playing games (92 percent) to doing schoolwork (76 percent) on these devices.

According to their moms, most Global Kids (69 percent) know a lot about what's happening in the world. And this worldview is reflected in their wishes for the future. When Global Kids were asked what they'd do if they had the power to change three things in the world, fewer kids focused on their narrower, more immediate experience like improving school lunches. Kids largely wished to change things having to do with big issues like the environment, economy and social civility.

Finally, the gender gap is closing for Global Kids. A closer look at their activities and values shows that traditional gender stereotypes are not holding up. When it comes to electronics, both boys and girls on average own the same number and types of devices and use them similarly. Boys and girls named the same sports as their top-three in which to participate: swimming, football/soccer and cycling. Boys are increasingly participating in many traditionally-female leisure activities, such as cooking, gardening and shopping. And when it comes to spending money and allowances, girls have nearly closed the "wage" gap.

[www.globalkidsstudy.com](http://www.globalkidsstudy.com)





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# Q

## IN FOCUS

### Product and Service Update

#### ●●● mobile research Smartphones equipped for qual

Research app takes bulletin board focus groups to mobile devices

Saskatoon, Saskatchewan, research company itracks has launched itracks Mobile, an app for conducting qualitative research. Building on the addition of video response and reporting capabilities to the discussion board software in July, itracks' latest offering is a fully-integrated mobile app allowing researchers to conduct research in the field and capture respondent insights in-the-moment.

The app features capabilities such as the ability to post text, video or dictated responses to discussions; mobile notifications that link to the application; customizable interfaces; and private client and moderator communication. Even without Internet connectivity, users can review responses and reply offline. Reply posts are automatically uploaded to the discussion board once users reconnect online.

Itracks Mobile is accessible by over 90 percent of smartphone users on both iPhone and Android devices and is available for download free from the respective app stores.

[www.itracks.com](http://www.itracks.com)



[quirks.com/articles](http://quirks.com/articles)

ID 20121104

#### ●●● hybrid research Omnibus goes qual

Toluna and iModerate partner for qualitative take on omnibus research

Wilton, Conn., research company Toluna has debuted the Quali MultiMind Omnibus, which combines Toluna omnibus data with professionally-moderated, real-time respondent conversations, powered by Denver research company iModerate.

Companies can ask as many as 30 questions of up to 5,000 U.S. respondents. In addition to quantitative data, clients receive qualitative feedback from 10 or more individuals, generated by conversations led by a professional moderator. Transcripts of each interview supplement data tables and are available within three days. Toluna's Quali MultiMind Omnibus uses SmartSelect, Toluna's methodology for ensuring sample representativeness and data accuracy.

[www.toluna.com](http://www.toluna.com)

#### ●●● eye-tracking research A more effortless eye tracking

SMI updates tools with gazes on-the-go and a gaze-mapping algorithm

Berlin, Germany, research company SensoMotoric Instruments (SMI) has launched SMI RED-m, a portable, high-performance remote eye-tracking device. At a size of 24cm x 2.5cm x 3.3cm and weighing 130 grams, it can be used with desktop, laptop and tablet PCs. The plug-and-play design aims to enable researchers to study visual perception wherever participants are.

SMI RED-m is intended to facili-

tate market research studies at public sites, research in clinical environments, test interactive learning technologies at educational institutes or conduct in-home research. The device runs via a single USB port of a desktop, laptop or tablet computer and needs no additional power supply. The system can be combined with SMI Experiment Suite 360° software for experimental design and analysis.

Additionally, SMI has introduced its Semantic Gaze Mapping, a patent-pending technology for analyzing visual data gathered from real-world studies using SMI Eye Tracking Glasses. Semantic Gaze Mapping is intended to provide consolidated eye-tracking data taken from multiple participants, making visualizing and quantifying data from mobile device screens, supermarket shelves, cockpits or various objects simpler.

The SMI Semantic Gaze Mapping technology is built on SMI's fixation detection algorithm, which takes into consideration smooth pursuit and vestibulo-ocular reflex eye movements. As a result, Semantic Gaze Mapping aims to reduce the data analysis effort by a factor of 10-to-50x, compared to conventional frame-by-frame video-coding methods.

[www.smivision.com](http://www.smivision.com)

#### ●●● ad research Scanning the creative

Ad agency uses eye tracking and focus groups to optimize campaigns

Clash Group, a New York advertising agency, has launched a market research initiative to track the eye movements of digital ad respondents and to research which ads garner the most response from differing demographic groups. The service is designed to enable advertisers to optimize their

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creative by identifying which color scheme, positioning and placement works best for acquiring positive responses to digital advertisements.

The market research technology will be provided by Mirametrix, a Westmount, Quebec, research company, and will be used on focus groups. Subjects are presented with several digital ad creatives, such as mobile and Web advertisements, and their eye movement is tracked to establish where attention is focused. Demographic information is also gathered to identify the different habits between men, women and different ages. The optimization algorithm uses a conventional camera sensor that relays information to software.

The initiative uses a non-verbal and passive approach, allowing focus group subjects to carry out the research at home or in public areas such as shopping malls and sports venues. [www.clashgroup.com](http://www.clashgroup.com)

## ●●● brand research Start with a Blueprint

New strategy development process aims to improve brand communications

Los Angeles research company PhaseOne has launched its Communications Blueprint Generator, an analytical service designed to help clients improve positioning, communications and messaging.

Companies can use the Communications Blueprint Generator to analyze the competitive communications landscape to understand the concentration of messages in the category and to identify untapped messaging opportunities. This learning is then layered on their targets' attitudes and opinions to ensure that

a business or brand's communications are capitalizing on the right messages for the specific target audiences.

[www.phaseone.net](http://www.phaseone.net)

## ●●● marketing-mix Trio of updates

Optimization software updated to improve forecasts, pricing functionality and collaboration

Cincinnati research company ThinkVine has released a new version of its marketing-mix optimization software. The enhancements aim to give marketers better decision-making information with improvements to what-if scenario planning, including faster simulations of consumer behavior, more information as part of each forecast and the ability to test absolute and relative price changes as part of a scenario.

ThinkVine customers run what-if scenarios that simulate the results of marketing plans and provide forecast results in terms of sales, ROI and other key measures. Engine performance improvements of the underlying ThinkAhead Technology in this release are designed to improve speed to insight and enable a more granular, in-depth understanding of what has and hasn't worked in the past, as well as guidance to maximize cross-channel marketing dollars. The information delivered with each scenario is also improved via a combination of enhancements to existing tables and charts and new chart types.

New pricing functionality enables marketers to evaluate the impact of price changes on sales volume or other metrics for each marketing plan scenario for a more holistic view of the short- and long-term effects of price and promotions. This is also analyzed in the context of competitive drivers so marketers can prepare for whether the competition mimics

the price change or remains the same.

Collaboration is improved via a new chart that summarizes the marketing plan; advanced group-level security features; and a repository of subscription documents, presentations and administrative information accessible to all team members.

[www.thinkvine.com](http://www.thinkvine.com)

## ●●● survey software Keeping up with quotas

Kinesis Survey platform upgrades quota management tool

Kinesis Survey Technologies LLC, Austin, Texas, has added advanced capabilities for using nested quotas within market research surveys to the latest version of its Kinesis Survey platform. The Quota Manager tool is designed to facilitate wizard-based creation of complex nested quotas, enabling users to specify relations between various quotas. It also auto-sums quotas as they are entered and allows for direct upload/download of an unlimited number of quotas (both nested and non-nested) with a CSV file.

Additional features include a watchlist function to collect and display specific quotas when potentially thousands are in use; adjustment of individual and bulk quotas; and the ability to set e-mail alerts and auto triggers as quota parameters are met.

[www.kinesisurvey.com](http://www.kinesisurvey.com)

## ●●● research applications Real-time updates

Invoke unveils two updates to its Engage platform

Waltham, Mass., research company Invoke Solutions has introduced Instant Insights and Client Labs to its suite of real-time market research applications using the Engage Technology Platform.

The Instant Insights application is designed to give clients real-time qualitative consumer insights in three days or less. It uses both the Invoke LIVE! experience and its speed-to-answer methodology to gain tactical and strategic directional answers quickly, at a low cost and with easy implementation.

Client Labs is intended to provide an ongoing source of insights from the people who matter the most to a brand. Client Labs is a private cloud, which encourages a dedicated sample, fast turnaround on any subject and up to 60 percent savings on panel costs. Client Labs works on the Invoke LIVE! platform and provides interactive analytics software.  
[www.invoke.com](http://www.invoke.com)

## ●●● competitive intelligence

## Get a leg up with the SBA's SizeUp

Small-business comparison tool helps businesses find their place in the market

The U.S. Small Business Administration, Washington, D.C., has debuted SizeUp, an online tool designed to help small businesses identify new customers and compare

businesses against one another with data from hundreds of private and public sources.

The site provides small-business owners with geographic information, recommendations for where to advertise and other market research. SizeUp provides data analysis in three ways: benchmarking an existing business to see how it sizes up by comparing performance to all other competitors in the same industry; mapping competition to see where competitors, customers and suppliers are located; and finding the best places to advertise by choosing from preset reports to discover areas with the highest industry revenue and the most underserved markets. Custom demographic reports can also be created.

[www.sba.gov/sizeup](http://www.sba.gov/sizeup)

## ●●● ad research Ignite your mobile measurement

Panel-based service analyzes cross-platform campaign performance

Stamford, Conn., research company InsightExpress has launched Ignite Mobile, a cross-platform campaign measurement service designed to advance media measurement by linking mobile ad exposure to consumer attitudes and behavior. Ignite Mobile captures mobile ad exposure across a 250,000-member panel, a subset of the Ignite Network, and offers access to Android, iOS and WP platform users.

The technology behind Ignite Mobile's panel-based approach aims to alter the media measurement landscape in three ways. First, it enables mobile ad effectiveness and cross-platform measurement to be conducted while adhering to the same experimental design approach

used when measuring online campaigns. As a result, the media measurement community is no longer beholden to the traditional pre-/post-campaign research methodology when conducting mobile ad effectiveness and cross-media research.

Second, recruiting respondents via e-mail reduces the need for pop-up or on-device surveys and reduces the need for advertising inventory from media partners, which aims to improve the experience for users. This development allows mobile publishers to focus on content creation and collecting more survey data without worrying about the impact of ongoing research on their site's visitor experience.

Third, Ignite Mobile allows for the tracking of mobile ad exposure on iOS devices which, up to this point, have been elusive to measurement across browsing sessions.  
[www.insightexpress.com](http://www.insightexpress.com)

## ●●● shopper insights A Pathway to insights

Radius develops approach for following the purchase process

Radius Global Market Research, New York, has debuted Decision Pathway Analysis, an approach to identifying and dissecting the various components of the consumer purchase process. Through a data-driven process, Decision Pathway Analysis aims to identify the various decision pathways that shoppers follow to a brand, as well as the frequency with which these pathways occur. The Radius team will also determine the impact of brand touchpoints on each pathway relative to how they drive the final purchase decision.

Decision Pathway Analysis is

designed to help guide marketer decisions as they prioritize initiatives aimed at influencing the purchaser experience. Specifically, marketers can determine which touchpoints are most effective at motivating potential customers; understand the various decision pathways that may exist in a category to help manage nuances and tailor marketing strategies and tactics; and influence the decision process to attract customers as they hit critical points along the pathway.  
[www.radius-global.com](http://www.radius-global.com)

## ●●● government/social media research A key to the city (issues)

### Social media mining from IBM aims to guide city decisions

IBM, Armonk, N.Y., has unveiled a social sentiment capability based on sophisticated analytics technologies to help cities around the world better measure and understand public opinions on key city issues and services such as public transportation or education.

IBM's analytics and natural language processing technologies, used to analyze large volumes of public social media data to assess and understand citizen opinions, are now available to city governments around the world. The social media analytics capabilities aim to help city officials make more informed decisions by looking at unfiltered citizen attitudes and actions, distinguishing between sincerity and sarcasm and predicting trends as they surface online.  
[www.ibm.com](http://www.ibm.com)

## ●●● benchmark research Poll meets Surveys

### Harris Interactive and Google partner to launch self-service benchmarking service

Rochester, N.Y., research company Harris Interactive Inc. and Google, Mountain View, Calif., have collaborated to combine the Harris Poll with Google Consumer Surveys to develop a product designed to allow businesses to compare themselves to industry benchmarks. The partnership aims to deliver results at a fraction of the cost of traditional market research. On an ongoing basis, industry benchmarks will be collected and delivered, free of charge, within the Harris Poll and Google Consumer Surveys platform.

The first benchmark study offered within the Harris Poll and Google Consumer Surveys platform investigates customer satisfaction in the banking industry, covering Bank of America, Chase Bank, Citibank and Wells Fargo. Results of this Harris Poll benchmark study are available at [www.google.com/insights/consumer-surveys/harrispoll/banking](http://www.google.com/insights/consumer-surveys/harrispoll/banking).

## ●●● mobile research Come one, come all

### Survey tool to deliver consistent surveys across all devices

Global Market Insite Inc., a Bellevue, Wash., research company, has launched a multiplatform interactive survey tool designed to provide clients and panelists with a seamless survey experience across all platforms and all devices. The new GMI device-agnostic solution allows surveys to be deployed independently across multiple platforms while retaining the same look and feel, regardless of how respondents access them.

By creating a unified design and question library for all popular Internet browsers and device plat-

forms, studies can be run automatically across multiple devices, including desktops, laptops, tablets, mobiles and smartphones.  
[www.gmi-mr.com](http://www.gmi-mr.com)

## ●●● Briefly

■ Stamford, Conn., research software company FocusVision has launched InterVu Usability, a service that uses Webcams to allow researchers to conduct usability testing on all mobile devices and tablets. The system comes with an on-site technician.  
[www.youtube.com/watch?v=dcAoxLzdG-c&feature=g-all-u](http://www.youtube.com/watch?v=dcAoxLzdG-c&feature=g-all-u)

■ San Francisco research company Topsy has released Topsy Pro Analytics Public Sector, a real-time social analytics solution for government agencies, offering instant access and multi-year analysis of hundreds of billions of public Tweets, posts and pages gathered from millions of socially-active Web sites worldwide via a browser-based user interface.  
<http://about.topsy.com>

■ Boulder, Colo., research company Market Force Information Inc. has unveiled Check-it, an age-verification system. Using Market Force's nationwide team of 20,000+ 18-to-21-year-olds, businesses can monitor and understand if staff members asked approved Check-it shoppers for ID; when and where during the visit the shopper was asked for ID; and how they were asked for ID and the effect this had on the shopper and their overall experience.  
[www.marketforce.com](http://www.marketforce.com)

■ Portland, Ore., research company Webtrends has updated the social measurement capabilities for its Analytics On Demand product, as well as the availability of comprehensive social measurement solutions. Existing Facebook reporting from Webtrends has been enhanced to include insight into the nature, influence and success of Facebook Page posts. Additionally, it offers the ability to measure engagement and success of YouTube and Twitter channels.  
[www.webtrends.com](http://www.webtrends.com)

■ Olson Zaltman Associates, a Pittsburgh research company, has introduced the Implicit Association

Evaluator (IAE), an online tool designed to quantitatively measure the strength of unconscious associations in the minds of consumers. IAE is a complement to the company's patented qualitative methodology, ZMET.

[www.olsonzaltman.com](http://www.olsonzaltman.com)

■ Miami research company Geoscape has released the latest version of its Geoscape Intelligence System, which combines data and technology at national, local and micro-neighborhood levels.

[www.geoscape.com](http://www.geoscape.com)

■ Portland, Ore., research company Revelation Global has updated its services. It has expanded its support hours; added the capability to allow participants to save a draft of their work and come back and finish later while auto-saving participant responses as they are working; and allowing researchers to schedule participant invitations in advance.

[www.revelationglobal.com](http://www.revelationglobal.com)

■ Phoenix research consultancy Cambiar has announced four new train-

ing offerings via its partnerships with The Burke Institute, Aaron Field and the Market Research Executive Board. For a full list of course offerings visit [www.consultcambiar.com/consulting-services/training](http://www.consultcambiar.com/consulting-services/training).

■ Mindwave Research, Austin, Texas, has introduced its Technology Advertising Planner (TAP) research study. TAP is a large-scale syndicated tracking study that aims to measure Web site visitation, social media interaction, publication readership, TV viewership and trade show attendance among business IT decision-makers.

[www.mindwaveresearch.com](http://www.mindwaveresearch.com)

■ Harpeth Marketing, a Franklin, Tenn., marketing firm serving the market research industry, has released *Marketing & Sales for the Market Research Firm: Part 2 – How to Build an Effective Business Development Structure*, a 14-page e-book. The e-book is available as a free download at [www.harpethmarketing.com/ebook](http://www.harpethmarketing.com/ebook).

■ San Ramon, Calif., research company eQuest has started a blog, dubbed Floating

Point, which focuses on big data.  
[www.equest.com/news/floating-point](http://www.equest.com/news/floating-point)

■ Reston, Va., research company comScore Inc. has introduced its Video Metrix online video measurement service in Taiwan, Vietnam, Indonesia and the Philippines.

[www.comscore.com](http://www.comscore.com)

■ Research Now, Plano, Texas, has launched its U.K. Healthcare Panel and Canada Healthcare Panel.

[www.researchnow.com](http://www.researchnow.com)

■ Polaris Marketing Research Inc., Atlanta, has redesigned its Web site ([www.polarismr.com](http://www.polarismr.com)) to improve the user experience, allow for easier navigation and provide information via its Research LifeLine portal ([www.researchlifeline.com](http://www.researchlifeline.com)).

■ New York researcher The Nielsen Company's National People Meter, an electronic metering system for TV ratings delivered overnight, celebrates its 25th anniversary this year.

[www.nielsen.com](http://www.nielsen.com)

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# The five absolute, no-excuse must-dos for online qualitative researchers

| By Adam Rossow

## snapshot

To make your online qual all it can be, you need to plan well, communicate effectively and manage actively, the author says.

Online qualitative research can be challenging, given all the factors necessary for a successful project. You have to juggle logistics, multiple objectives and client expectations, all while searching for the Holy Grail of insight. At our firm, we've learned a few things over the years that can help you defend against potential hazards and set yourself and your clients up for success.

**Coordinate and communicate.** Too often we've seen research projects crumble simply due to poor internal planning and organization. So how are you set up to succeed? If you don't have an effective project management structure, your project might be doomed from the start. But there are simple and small organizational changes that can really help guard against most internal gaffes.

Start by assigning a dedicated team for each project and make it clear to the client as to who will be responsible for what. A single point-person who serves as the main liaison is crucial. Then, try putting a project checklist into play to keep everything transparent and everyone on-task. Impromptu communication is great but don't be shy about scheduling regular check-ins at specific points in the project life cycle. This will help keep objectives front and center – and scrambles at bay.

Finally, work in advance to designate preferred communication channels both internally and with the client. It seems simple but having an internal IM tool or a dedicated line for clients in-field can make world of difference in the fast-paced world of online qualitative.

**Kick ass on kickoff calls.** You're a researcher, so research. Ask questions, listen, probe a little deeper and look at things from multiple vantage points. It's not just about the stated research objectives, it's about where this research and the possible outcomes fit in their business, what would surprise them and what would make them feel like the smartest person in the room.

At our firm, we hold the kickoff calls with all project team members so everyone has a chance to explore and to ensure everyone hears it directly from the client's mouth. Simply put, going through the motions on these calls makes you a vendor but being inquisitive and understanding your client's business and research objectives inside and out makes you a partner.

**Find them, know them, manage them.** The art and science of sampling and knowing your audience is key. You can have the best moderators and qualitative experts on your team but if they aren't set up to succeed with a comprehensive sampling effort, your project will be strained from the get-go.

Knowing your audience, their habits, behaviors and tendencies is imperative. When are they most likely to be available? What is their age and capacity to communicate in the medium you are using? Where do they live and when are they available? Some audiences are less responsive during a normal workday and some are more responsive. Some audiences are comfortable online while others may have more difficulty typing. Moreover, response rates can easily fluctuate with the time of day, day of week and holidays.

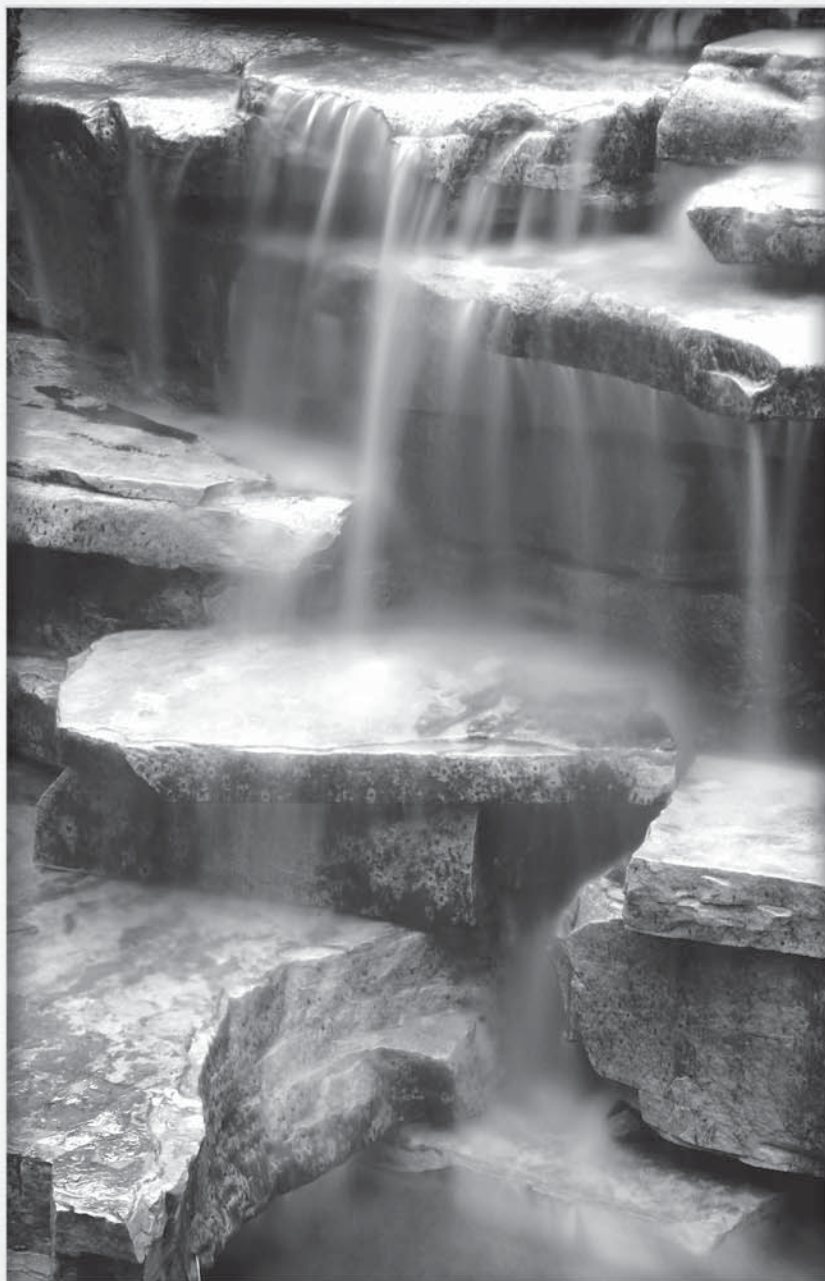


[quirks.com/articles](http://quirks.com/articles)

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the shades of gray complete the masterpiece.



While data give answers in black and white, it's the subtleties of the gray areas that give you the big picture. Burke understands the nuances of research. Grounded in academic principles and guided by ongoing internal research, Burke helps you determine the best research method, gather the information, and develop the best strategy for actionable results. You will have confidence in your decisions because you have the experts at Burke to support you. Visit [Burke.com](http://Burke.com) or call 800.688.2674 to find out more.



*The Fine Art of Marketing Research*

All of these fickle factors call for a detailed sample plan and a team whose sole mission it is to know these audiences, work with sample vendors and ensure everything flows smoothly. In our world this is not a nice-to-have, it's a must-have.

**Don't get bullied.** We know that the client comes first and that their goals must be met. However, if there are too many objectives, then most likely none are going to be achieved. Regardless of what the client wants to accomplish, you know what your methodology, your people, your design and your respondents can handle. Clients aren't just paying you for your research tool, they are paying you (hopefully) to consult and advise. So do just that. If questions and objectives are being crammed in from all directions, don't be afraid to make a recommendation to either cut the length or change the design.

We tell many of our clients from

the outset that they can either snorkel (cover more range but stay shallow) or scuba dive (cover less but go much deeper). If they want the richness that comes from thorough exploration, they need to follow our lead and we as researchers need to stay focused and diligent.


**Above all else, engage.** While we wish that each project revolved around every teen's favorite game or shopper's favorite brands, this is not the case. We often are tasked with investigating something not as alluring, like the tweak of a tagline or the clarity of an offer. But regardless of what the topic is, we have to do our best to engage each respondent.

#### A variety of strategies

Accomplishing this online can be more challenging, which is why moderators need to be experienced, well-trained and have a variety of strategies at the ready. We've found that there is no

substitute for personalizing each conversation and making the respondent feel valued and appreciated. Every respondent isn't the same and shouldn't be treated as such.

Moderators need to lean on the tenets of psychology, be upfront about expectations, utilize projective techniques when necessary, ground respondents in their experiences and try to gauge respondents' personality types to find the best approach.

Connecting with respondents online with no strategy and direct questions will get you direct answers, nothing more. However, utilizing moderators who know how to build rapport and engage and have mastered tactics to do so will get you the insights you're craving. 

Adam Rossow is vice president of marketing at Denver research firm iModerate. He can be reached at 303-928-8406 or at [arossow@imoderate.com](mailto:arossow@imoderate.com).

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# Lessons for using online panels in B2B research

| By Natalia Elsner



## snapshot

Natalia Elsner outlines how to react when you have questions about the quality of B2B panel respondents

When McKinsey & Company released its employer study of health care benefits in June 2011, controversy quickly erupted because the findings were so at odds with the projections from the Congressional Budget Office, Urban Institute and RAND Corporation. While critics attacked the polling nature of the study and the fact that the questionnaire “educated” respondents, I kept thinking, “What if it’s the sample?”

Even after McKinsey released the methodology and crosstabs of the survey data, I still wondered if I could entirely trust an online panel to deliver 1,300 qualified respondents in the health care benefit space for a self-administered survey. The high incidence of “Don’t know” on some fairly basic questions indicated potential response-quality issues.

It was not the first time I wondered about the quality of the online sample for B2B research.

A lot has been written about online panels, with most authors focusing on issues pertinent to consumer studies and public opinion polling. B2B is in many ways a different animal: the size of the universe may or may not be measurable; the universe may be quite small (e.g., in managed care research); fielding costs are considerably higher; and study participants must be either in positions of influence (such as buying or influencing insurance coverage decisions) and/or in the position of knowledge (e.g., specific training or expertise enabling them to evaluate the merits of new products or technologies).

### Lesson one: trust but verify

The first time I had misgivings about the quality of B2B panel respondents was when I was overseeing the fielding and performed data analysis of an on-

line survey of dentists. I’ll refer to this panel company as Panel A. A programming glitch allowed panel members to enter the survey multiple times; this led to a discovery that some respondents changed their answers to the screening questions in an attempt to qualify for the survey.

Further, 3 percent were disqualified because they answered that they were NOT licensed to practice dentistry in the United States. So, how could they have been included in the online panel of U.S. dentists in the first place?

When we rebid this study later and evaluated other panel companies, I took a close look at the overall counts of dentists that the panel companies claimed and compared those to the estimates from the Bureau of Labor Statistics (BLS). Curiously, counts of dentists from Panel A approached 80 percent of the BLS-estimated universe of dentists, whereas a company we’ll call Panel B had only 15 percent of the universe – a far more reasonable subset.

We have seen even more egregious overstatements (see Table 1 for examples from Panel Company C) but BLS statistics are only of limited help: Most B2B respondents cannot be as neatly categorized as health care professionals.

Even though panel companies claim they validate their respondents (and with licensed health care professionals, member identity can be verified through external sources – see References section for link to a Frost and Sullivan report), it’s a good idea to screen respondents more rigorously than what a typical screening questionnaire will do. Our firm routinely includes knowledge questions and red herring-type questions in screening (see Table 2). We also evaluate open-ended responses and



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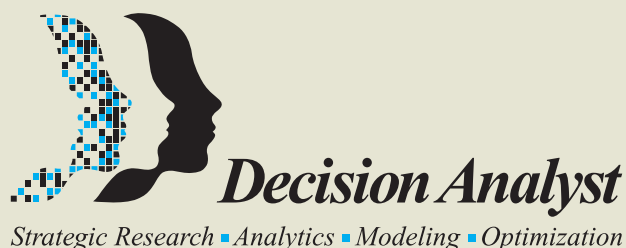
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Table 1: Counts of health care professionals from Panel C

Specialty	Estimated U.S.-based counts from Panel C*	Estimate from BLS*	Panel C as % of BLS estimate
Anesthesiology	38,611	34,820	111%
Family and general practitioners	92,450	97,820	95%
Obstetrics and gynecology	32,675	19,940	164%
Dentists, general	93,375	120,200	78%
Prosthodontists	2,352	500	470%

\* Published as of August 2011; BLS estimates based on 2008 data

Table 2: Examples of screening questions

What is the number assigned to the right upper canine?	[Terminate all answers other than "6" or "six."]
About what percentage of your workforce that is covered through your company health benefits is enrolled in each type of plan?	HMO: — PPO: — POS: — Small business health insurance exchange [Red herring] — Indemnity [Also a plausibility check for unreasonably high %] — High-deductible health plan with savings option (such as HSA or HRA) — TOTAL (must equal 100%) — o Don't know [Terminate]
I am aware of the following drugs for treating rheumatoid arthritis and/or Crohn's disease (check all that apply): [Randomize order]	<input type="checkbox"/> Remicade <input type="checkbox"/> Humira <input type="checkbox"/> Enbrel <input type="checkbox"/> Simponi <input type="checkbox"/> Emend [Terminate] <input type="checkbox"/> Zolanza [Terminate] <input type="checkbox"/> None of the above [Terminate]

look at response consistency. Both can be fairly time-consuming and, as a result, we may remove more respondents than is customary: up to 5 to 10 percent of responses may be discarded at data processing.

### Lesson two: incorporate respondent verification into survey design

My experience with Panel A prompted me to explore how other research companies

approach panel use for B2B recruitment. I interviewed two research professionals. The conversations went like this:

Elsner: How do you know that the B2B respondents you get from an online panel are who they say they are?

Researcher: Well, the data that came back looked solid.

Elsner: How do you know it was solid?

Researcher: It was what we expected.

Elsner: Did your survey include any red herrings or other implausible options? Did you

evaluate the quality of open-ended responses?

Researcher: No.

Elsner: Then can you really be sure the data was solid?

Researcher: We had no reason to doubt it.

When I posed the same inquiry to a few online forums of market research professionals, the response was dead silence.

Understandably, research is often undertaken to confirm a hypothesis or validate a decision that has already been made. But if a survey only offers a universe of plausible response options, then respondent data will only include plausible response selections, thereby increasing measurement error and failing to reveal respondents' ignorance on the subject. A few well-placed red herrings or an occasional open-ended question, even in rigorous quantitative instruments, allow the analyst to look for damning inconsistencies which may suggest taking a closer look at the respondent.

### Lesson three: expediency has a price

After the McKinsey study, I talked with another research professional whose company conducts large annual surveys of HR benefit managers. He admitted having doubts about the quality of the online sample. But, for his company, pressures around deadlines, survey length and quotas outweigh the methodological rationale for including knowledge questions and traps. We've been there, too. But just as research dollars may be wasted if we fail to scratch below the surface to expose the unexpected nuggets of insight, so too might the whole exercise be for naught if the sample fails to make the grade and strategic recommendations are based on data from uninformed respondents. ①

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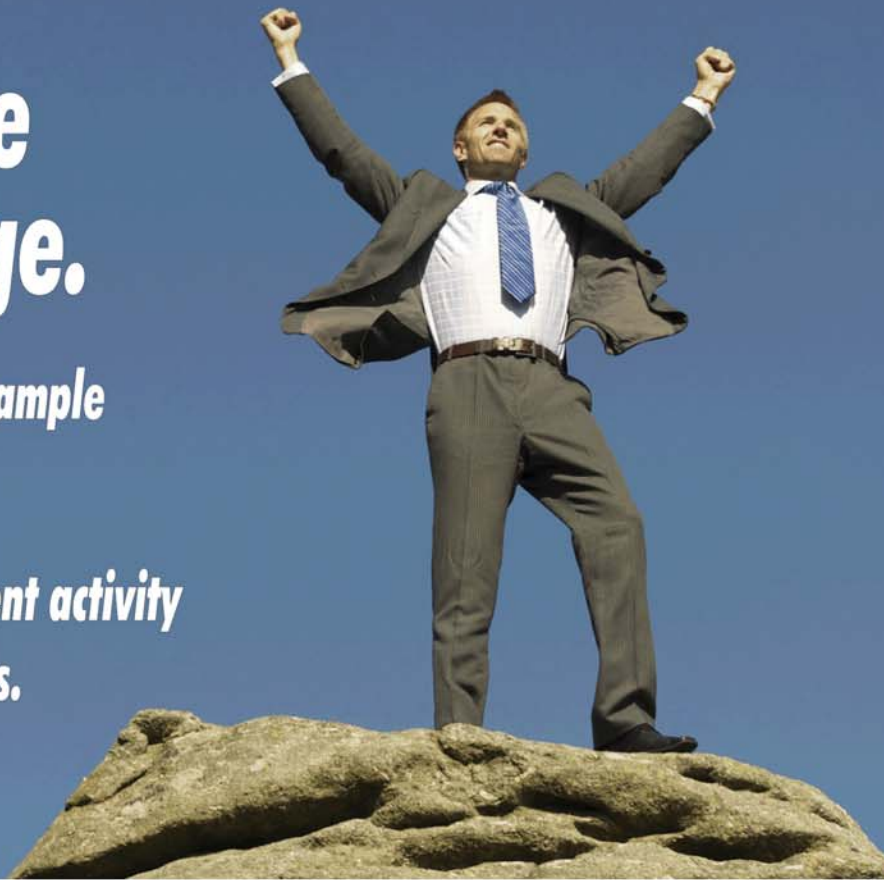
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# As the world works

Ethnography-based hybrid research stretches four continents to study workplace interaction

| By Brian Green

## snapshot

Herman Miller conducted a global hybrid research project to observe how people behave and collaborate in the office to inform new product development.

**R**esearchers all want to produce relevant results for their clients. It's even better when they get to see the world along the way. As a senior researcher for Herman Miller Inc., I recently completed a project that logged thousands of frequent-flyer miles, taking me to the top of the London Eye, the steps of the Sydney Opera House, across the Hoover Dam and more.

By the time it was done, my ethnography-based research had touched four continents and involved interactions with over 10,000 people over the course of more than three-and-a-half months on the road. After over 730 hours of field research, over 3,000 pictures and almost 30 hours of participant-generated video footage, the study yielded a plethora of rich data.

Herman Miller is a 105-year-old global innovator in contemporary interior furnishings, systems and accessories designed to enhance people's experience in the workplace, healing, learning and residential environments. We aim to create inspiring designs to help people do great things.

The company has a team of researchers as part of its insight and exploration team. This multidisciplinary group of researchers is part of Herman Miller's product development team and conducts global research within each of its target markets. The group focuses on problems, has a culture that supports creativity and takes a broad look at emerging issues. Our explorations lead us down a variety of paths – some that are potential innovations in materials, some process, some in terms of the solution. Our passion is around innovation and this is what we strive for.

### The ways people interact

The primary purpose of this internationally-inclusive study was to bring focus to physical and virtual work behaviors. Our team wanted







a risk that having us on-site might alter the employees' behavior, this didn't appear to get in the way. The employees' interactions were between themselves; we weren't really part of the office dynamic. In fact, most employees didn't pay any attention to us.

### Participant documentation

We asked employees to use an interaction log, which is a one-page form with check boxes, to chart the characteristics of interactions. We wanted an easy way to paint a picture of each interaction. It captured things like the number of people participating in the interaction, duration, space where it occurred, technology and tools that were used and the levels of privacy they had, both visual and acoustical.

A subsample of the participants, typically 10-15 over two days, was asked to complete the log. We didn't want this to become a burden so each of these participants completed the log for only one of the two research days. The volume of completed logs intrigued us. In most cases, people were surprised how many logs and how many interactions they had in the course of a day.

The interaction logs were meant to be straightforward and easy to use. The process was seamless until we conducted research at a company that is almost entirely paperless. The employees each had laptops that they used for note-taking. I showed up with the paper-based interaction logs and was greeted with, "I don't know where I am going to get a pen." Note to self: Carry along extra pens when doing research at today's progressive companies!

### Online survey

The online survey was administered to all residents at the customer sites. Our survey gathered information similar to the interaction log. Employees were asked to think about one of their most recent interactions. They were then presented six different types of space and asked which typified where the interaction happened. The spaces were depicted with photography from their own spaces and a written description. Once they selected a space type they were asked about the characteristics of the interaction. The survey was customized for each research site with the company's logo information and images from their company environment.

### Focus groups

We gathered eight-to-10 employees for focus groups at each site to help us better understand what we were seeing. In most cases, the

to identify the ways people interact and how employers are supporting and fostering that behavior. What we learned would inform Herman Miller's new product development and create knowledge that could be shared with customers.

There is nothing quite like seeing things in person. Two researchers – myself and a colleague – spent two days at 15 different corporate locations: seven in the United States, three in the United Kingdom, one in India and four in Australia. These companies represented a wide range of industries, a strategic decision we made rather than trying to dive deep into specific industries across the continents.

### A complex approach

When our research team set up the study we determined that a successful project needed a complex approach, involving a variety of research methods. This would help us identify work behaviors in the office environment. Using mixed methods let us to hear directly from office workers, observe behaviors and obtain an understanding of why people do the things they do.

### Observation

This was the cornerstone of the methodologies. We worked with the customer contacts to determine which departments in their buildings were best to observe. With this there is definitely some sample bias but it is quite intentional. We were looking for study participants who spend more time interacting with others as a function of their jobs. The observation tended to happen across a floor or two of an office building. This helped assure that one subset didn't cloud the research findings.

We were often given a desk to sit at as a home base. From there, we spent our time watching employees' interactions. While there was

facility manager helped select the participants. The focus group was held on the second day of research, allowing us to gather our thoughts and look at the information coming in via the interaction logs and online survey. Each focus group was audio-taped. I led the focus groups while my second researcher took notes.

Participants in the focus groups were asked a variety of questions, some based on the research components, others from a moderator's guide. We explored their most-favorite and least-favorite spaces. They talked about where they go to get heads-down, focused work done and where they go to interact. We asked where participants bump into others and have unplanned but meaningful conversation. We also discussed what tools and technologies were utilized in these spaces.

### Video diaries

Day-in-the-life video diaries captured employee interactions. Employees were asked to find situations that might be insightful and in which they could tell us why they were doing things the way they did. We asked that they capture the environment around them when they were interacting. While these videos produced their share of bloopers, they also provided a wealth of information from the participants' perspectives. The duration of the videos ranged from a few minutes to almost 90 minutes. It really varied by the participant.

### Pictures

We took many pictures at each site to document the types of areas and the interactions that took place within them. Photos were later categorized and tagged with descriptors using Google's Picasa software program. This allowed for easy sorting of pictures based on the images' visual content. The pictures, combined with the video diaries, helped demonstrate our research findings.

### Utilization study

At the beginning of each site visit, we asked the company to provide floor plans of their spaces. These were used to chart interactions. Because we toured the space every half-hour,

documenting where the interactions occurred, we were able to create a heat map of the space. This showed where interactions were happening and where they weren't. This became great fodder for the focus groups. We also captured characteristics of the interactions, such as how many people, technology and work tools used and postures of the participants.

### Challenges to overcome

There were a number of challenges to overcome for my research partners and me. The global nature of the project was a big one. Since I was the only common thread across all sites, the research was a slave to my travel schedule. The frequent-flyer miles were nice but traversing the globe takes time. The logistics also challenged our team to find company sites across multiple time zones.

Finding the right research site was a crucial part of the study. Companies were recruited by the Herman Miller sales force. The sales team was asked to find companies that have several cross-functional teams; are doing interesting things with their work environments; and have a strong real-estate team trying new things with their environments. These are typically companies taking a strategic approach to their facilities.

Finding candidates to partner in research is always a challenge. While we had only positive interactions with all the employees we observed and who participated in the study, at times it was difficult to make sure the data collection wasn't too intrusive or disruptive to work flow. After all, employees are at work to get a job done. The companies were assured that we wouldn't get in the way and we listed the steps we'd take to minimize disruption.

The multi-method approach we utilized provided for a lot of on-site management. We had to keep the participants engaged, particularly those doing the interaction logs and video diaries. Incentives (\$5 Starbucks gift cards) were provided for people completing those two elements of the research while participants in the focus groups were given lunch or snacks.

### A mountain of data

Having a plethora of methods is great for understanding but it leads to a mountain of data. This is a great thing for a researcher but it called for a rather complex series of analyses.

The pictures were sifted through and tagged with keywords using Google Picasa, which involves entering keywords into the program as descriptors of the visual content. The team did a cursory analysis of a couple hundred pictures to determine the appropriate tags. While this was labor-intensive, it allowed us to go back and sort the images based on the tags. A subset of the pictures were selected to create a collage of images on 4 x 8-foot foam-core boards. These helped provide some visual interest around the room during the presentation of results. Pictures are effective in connecting our audience with the research when we present the data.

The videos all had to be viewed, scrubbed of snippets that had audio or video trouble and then categorized with a process similar to that for the pictures. The videos provided us a powerful way to tell the participants' stories. A video montage was pulled together from these clips as an introduction to the research. This montage showed all the company sites we visited and helped provide a bit of context when reviewing the research results.

The interaction logs and online surveys were combed through to provide a glimpse at how people interacted within the different space types. The descriptive statistics of the interactions essentially provided an anatomy of the interactions we saw. Higher-level statistics were completed to see if there were differences between different types of space and the geographies.

The focus group recordings, as well as all the notes we took, needed to be sorted through to extract the key learnings. We first analyzed the information based on the moderator's discussion guide. Then we flagged interesting items that were outside of that guide and compiled those into a separate list. The focus groups were essential in helping us understand why people do things the way they do.

The utilization study provided plenty of useful information as well. Each floor plan was studied to deter-

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mine where the hotspots of interaction were. These fed into the focus groups, where we could probe why one area might see increased interactions over another. We were also curious about travel patterns within the space.

### Results were rich

With the wide variety of methods utilized in this study, the results were very rich. My research team was able to feel well-connected to the way people interacted across these companies. The following is a look into some of the findings.

As one might expect, the building, its interior layout and its furnishings play a huge role in how people interact in the work environment. Many of the company sites had elements of these which heavily influenced how people interacted within the space. Real-estate professionals cannot overlook the importance of holistic planning. These influences on space help to create the company's culture and shape interaction.

The utilization study yielded one of the more interesting statistical nuggets. We observed and charted that 70 percent of the interactions took place around the individual offices. On one hand this makes sense, it is after all where the people work. On the other hand, this reinforces the notion that people don't need formal conference rooms to interact with their colleagues.

Since the researchers determined that many interactions were happening around the individual offices, we wondered what drove people away from the desk space and into meeting spaces. Through the focus groups,

we found that people go through an almost-unconscious checklist to determine if they should find a meeting space or stay in their individual space. When someone walks up to an individual's desk, that individual considers the following:

- How long is this going to take?
- Do we need to have anyone else join us for the discussion?
- Are there any tools (e.g., whiteboard, tack board, projector, teleconference phone, etc.) that we need for a successful outcome?
- Is the topic we are discussing appropriate for those around us?

When people are driven to a meeting space, they avoid areas that don't meet their needs. People know what works for them and what doesn't. The primary drivers that determine where people go when an interaction needs to become more formal are:

- Proximity – People typically won't bypass areas that work in favor of a "cooler" space further away.
- Availability – Is the place available for collaboration?
- Technology – Does it have the right technology tools for the task at hand?
- Lighting – Does the place have access to natural light? Is there adequate lighting?
- Tools (e.g., whiteboard, tack board, etc.) – Does the collaboration space have the tools that will make the meeting productive?

People often forget the number of interactions they have during the course of the day. They underesti-

mate the amount of time they spend interacting with people who have stopped by their desk for quick discussions. An anecdote from the research supporting this fact comes from the interaction logs. Many participants would tell us, "I am not a good candidate for these." We'd ask them to participate anyway. These same people would end up completing 15-to-18 logs. The participants didn't realize how often they interact with others during the course of a day.

### Bring the research to life

The study offered a very rich, broad look at how people interact. We created a Flash-based presentation filled with images and video clips to help bring the research to life by allowing our audience to visually connect with the participants. Having a presentation that captured the human element was paramount.

In conversations with study participants, it became very clear that place was very important to them. The long-held view that the corporate environment is going away is in stark contrast to the value placed on the office by the participants. These people used words like increased efficiency, clarity of communication and better personal connection to describe what they value about the office. Even in the age of technology and telecommuting, face-to-face interactions are still held in high regard. 📍

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# In a manner of speaking

The international language of value

| By Jane E. Mount

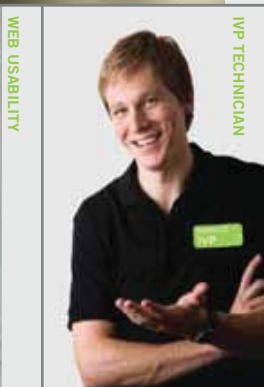
snapshot

A report on a study of international consumers and how they define value and the importance they place on it.

The Great Recession has spurred considerable debate among economists – how to best soften the landing for international markets, how to stimulate economic growth, how to forestall debt crises. Despite these debates, one area that continues to fascinate yet confuse us is the understanding of consumer behavior in light of this economy – and the rational and irrational elements that affect it.

Nowadays, consumers appear even more price-sensitive, as evidenced in the U.S. by the rise of extreme couponing, the annual Black Friday pandemonium and the increasing use of private-label grocery products. For broad consumer product segments, companies have lost pricing power and/or are forced to operate on ever-shrinking margins.

Yet consumers' desire for value remains. Consequently, we as researchers are asked to help our clients understand how consumers rate brands on value metrics. So, we measure and



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 Fieldwork Chicago  
 (O'Hare)  
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 Focus Pointe Global  
 Focuscope (Downtown)  
 Focuscope (Oak Brook)  
 Focuscope (Oak Park)  
 Murray Hill Center  
 Plaza Research  
 Schlesinger Associates  
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Table 1: International Ratings of Satisfaction and Value

Average ratings across service providers	Versus Average...	
	Ratings of SATISFACTION	Ratings of VALUE
Germany	↑	↓
U.K.	↑	↑
Sweden	↑	↓
U.S.	↑	↓
Spain	↓	↑
France	↔	↓
Australia	↔	↔
Netherlands	↓	↑
Belgium	↓	↓

Note: ↑ higher than average ↓ lower than average ↔ similar to average

countries, balanced to the appropriate census on age. Our friends at Research Now were kind enough to partner with us on this exploration and provided the general-population sample. Their local teams across these countries also reviewed the questionnaire and translations for native applicability. Additionally, we compared the Research Now sample to a separate cell of our client’s adult female customers who were also invited to participate in this study. This helped us in two ways: it provided a completely independent data set with which to conduct this test and it gave us additional insight as to how our client’s customers behaved relative to their marketplace. In total, a data set of 2,939 respondents participated, with no country having fewer than 407 participants.

Within the study, these women were asked to rate on a five-point scale (extremely satisfied, very satisfied, satisfied, not very satisfied, not at all satisfied) their level of satisfaction with their specific service vendors such as dry cleaners, movie theaters, hairdresser/beauty salon, cell phone provider and gym/fitness facility.

They were also asked to rate each of these service vendors on overall value, using a five-point Likert scale (very good value, fairly good value, average value, somewhat poor value, very poor value). Value was asked in the study as “Thinking about any costs associated with these services, how would you rate the value of each?” Respondents were also asked to specifically define value for each service vendor they use, using a list which included the following attributes of value: paying the lowest possible price; receiving the highest-quality service; receiving personalized attention when I need it; being happy with the end result of that service; the prestige offered by that service (U.K.: the status that using the service offers me); the reliability of that service; the convenience of the service; having a variety of service offerings to fit my needs; my confidence/trust in the brand; the company’s willingness to address my complaints; my personal enjoyment of the service; reputation of the service; and employee friendliness.

track brand value ratings. But what do these value ratings really mean?

### Looking more deeply

This question was asked by a global services industry client of ours. In light of the global recession this client, understandably, was looking more deeply at value ratings across the countries it services – to gain assurance that its service was not priced higher than market acceptance. This client, however, was uncomfortable with the results of these value ratings. When comparing to satisfaction ratings, in some countries its value ratings were lower than the overall satisfaction rating for its service. Did this mean that people liked it but it was too expensive? In some countries, the opposite was true. Could it be seen as inexpensive but not providing a good service? Did value relate to how the service was priced at all?

Also of interest, unlike measures of overall satisfaction as well as other aspects of satisfaction, measures of value across countries did not always correspond to accepted cultural norms

for scale usage. For example, in Spain we saw an expected use of the higher end of the rating scale for measures of value but measures of satisfaction were relatively low. This clearly warranted further investigation.

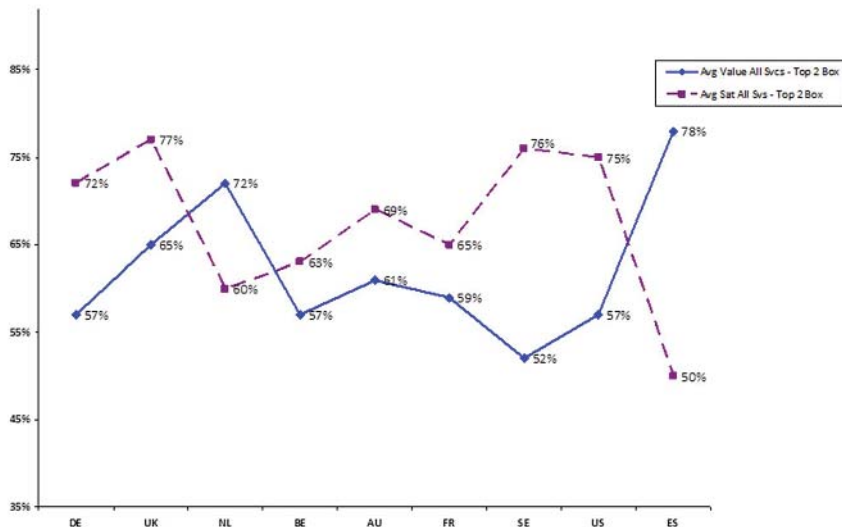
With the assistance and openness of our client, we conducted a two-cell 10-minute online study among women in nine countries: United States, Australia, Belgium, U.K., France, Germany, Spain, Netherlands and Sweden. The objective of the study was twofold:

1. To understand how women in different countries define value. Is it based more on absolute cost, on the outcomes of the service or on the depth of the services provided?
2. To understand how scale usage for ratings of value correlate to ratings on other service attributes in various countries.

In each country, a sample of approximately 200 respondents participated in this survey. The respondent base represented the general population of adult females in each of these



Figure 1



Finally, in order to confirm the scale usage for the measurement of value beyond local service providers, respondents were asked to rate the perceived value received from a number of well-known international brands, ranging from low-price to upscale. The brands tested included: Ikea, Aldi, BMW, L’Oreal, Apple, Nike, Coca-Cola, The Body Shop, MasterCard,

Louis Vuitton, Vodaphone/AT&T, McDonald’s and Starbucks.

**Closely mirrored**

Our first key finding was that the general-population sample closely mirrored the client-provided sample in each of these markets on both measures of satisfaction and value, suggesting that our questions were not

a client-specific phenomenon.

Our next key finding was that variations were consistently seen across countries in how women rate brands and services with regard to measures of satisfaction and value. When comparing ratings of value to ratings of satisfaction across service providers in a country, we saw that ratings for value frequently and consistently did not fall in line with ratings of satisfaction. This suggests that cultural bias to measurements of satisfaction versus value does take place.

For example, in Table 1, women in the U.S, Sweden or Germany tend to give their service providers higher ratings of satisfaction but they are more harsh when it comes to rating these same providers on value. Conversely, those in the Netherlands and Spain tend to rate their service providers more positively on value yet more harshly on overall satisfaction. These insights are helpful when comparing product or service satisfaction globally – suggesting that some rating differences by country are to be expected.

In Figure 1, we see how the aver-



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Figure 2

**Mean Values**

	DE	UK	NL	BE	AU	FR	SE	US	ES
Most Important	End Result 4.04	Reliability 4.11	Quality 4.79	End Result 4.38	Reliability 4.30	End Result 3.93	End Result 4.35	Reliability 4.36	Quality 4.24
	Employee friendliness 4.8	End Result 4.62	Reliability 4.84	Lowest price 4.99	End Result 4.70	Quality 5.42	Quality 4.46	Quality 4.55	End Result 4.51
	Quality 5.05	Quality 4.76	End Result 5.06	Quality 5.02	Quality 4.99	Reliability 5.57	Reliability 4.75	Lowest price 4.90	Reliability 5.75
	Personalized attention 5.54	Lowest price 6.22	Lowest price 6.09	Reliability 5.05	Lowest price 5.97	Lowest price 5.74	Lowest price 5.86	End Result 5.11	Personalized attention 6.1
	Reliability 5.79	Convenience 6.34	Convenience 6.77	Convenience 6.63	Convenience 6.28	Employee friendliness 5.98	Variety 6.03	Convenience 6.79	Convenience 6.43
	Variety 6.42	Brand trust 6.60	Employee friendliness 6.84	Employee friendliness 6.79	Brand trust 6.87	Personal enjoyment 7.06	Convenience 6.24	Brand trust 6.93	Variety 6.45
	Personal enjoyment 7.06	Personal enjoyment 6.94	Prestige 7.06	Personal enjoyment 7.04	Personal enjoyment 7.01	Personalized attention 7.12	Employee friendliness 6.86	Personal enjoyment 7.35	Employee friendliness 6.97
	Lowest price 7.21	Variety 7.49	Personalized attention 7.55	Variety 7.08	Variety 7.30	Convenience 7.24	Personal enjoyment 7.29	Employee friendliness 7.66	Personal enjoyment 7.22
	Convenience 7.40	Personalized attention 7.72	Brand trust 7.75	Personalized attention 7.68	Personalized attention 7.73	Variety 7.37	Brand trust 7.53	Variety 7.75	Lowest price 7.60
	Address complaints 8.01	Employee friendliness 7.81	Address complaints 7.84	Brand trust 7.90	Employee friendliness 7.77	Brand trust 7.78	Personalized attention 7.90	Personalized attention 7.97	Address complaints 7.93
	Brand trust 8.64	Reputation 8.26	Personal enjoyment 7.91	Address complaints 8.64	Address complaints 8.27	Address complaints 8.14	Address complaints 8.69	Address complaints 7.97	Brand trust 8.01
	Reputation 10.20	Address complaints 8.81	Reputation 8.98	Reputation 8.90	Reputation 8.55	Reputation 8.82	Reputation 9.90	Reputation 8.18	Reputation 9.56
Least Important	Prestige 10.80	Prestige 11.30	Variety 9.50	Prestige 10.90	Prestige 11.30	Prestige 10.80	Prestige 11.10	Prestige 11.70	Prestige 10.20

age satisfaction rating for all service providers evaluated differs from the average value rating for these same providers. With the exception of the Netherlands and Spain, we tend to see harsher ratings for value as compared to ratings of satisfaction.

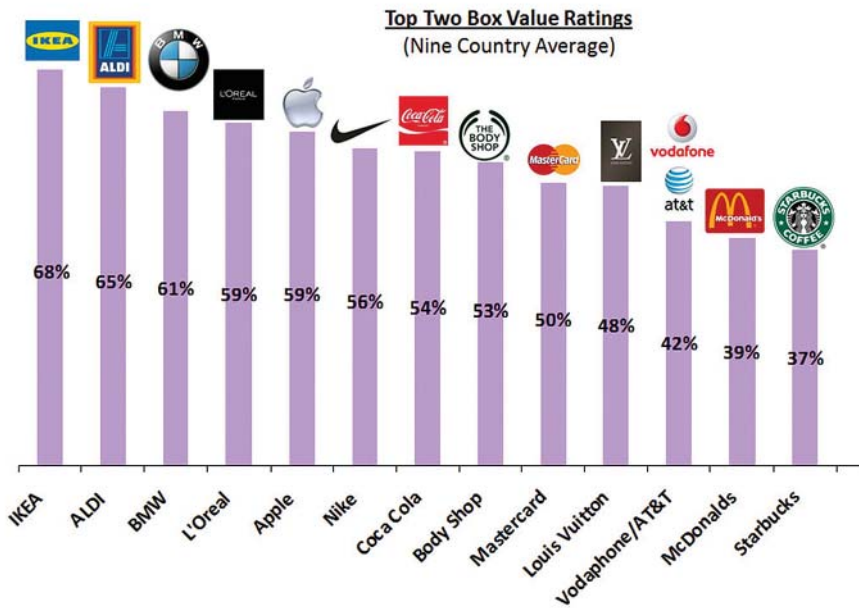
An equally important aspect of this study is the understanding of how women globally define value. In other words, is value really based on price? In light of the recession, one might think so. To answer this question, these women were asked to define what value means to them with regard to these service providers. Respondents were asked to rank

how they determine value for each of these service categories, ranking from a provided list of 13 attributes. Figure 2 highlights an average of all service providers, with lower mean ratings reflecting more important attributes with respect to defining value (the closer an attribute is to 1, the more often it is ranked most important in terms of defining value). Here, we see an uncanny similarity across these countries in how value is defined in terms of ranked importance. While lowest price does routinely fall into the top five attributes of importance, it falls behind “being happy with the end result of that service,” “receiv-

ing the highest-quality service” and “the reliability of that service.” This demonstrates that even in times of great economic concern, the average customer is still looking for a positive outcome from their service. Only then will they derive value from it. So, internationally, we see similar drivers of value – but resulting in much different outcomes with regard to ratings of value. This suggests that attention to price alone will not generate a service that is deemed valuable by its customers.

For the most part, women in these nine countries are quite similar in what they are looking for from their

Figure 3



service provider. They are also similar in what they are not looking for; reputation and prestige are least likely to be claimed as important factors in defining value. However, some unexpected differences do surface. For example, German women rate friendly service more highly than those in other countries, while Dutch women are more likely to seek prestige.

If this is how women feel about their local service providers, how do they feel about iconic global brands? Do these same cultural expectations exist? In extending this research to key international brands, we see that a low price does not necessarily generate a high value rating globally (Figure 3). For example, while Ikea and Aldi both report high overall value ratings (as would be expected given their low-price positioning), so does BMW. Meanwhile, the value of McDonald's is among the lowest in the group. Inexpensive doesn't always mean value.

In looking at these results by country, we found the same cultural scale usage persists with regard to the evaluation of value even among iconic brands. Across these brands, we tend to see value ratings that are: lower than average in Germany, Sweden, the U.S., Belgium, France; higher than average in the Netherlands, the U.K. and Spain; average in Australia.

### There are differences

This study suggests that there are indeed differences from country-to-country both in how women assess

value and, to a much lesser extent, in how they define value. Across countries, the women in this study shared the perception that value is primarily defined by the end result of the service, being high in quality and being reliable. While having a low price is also important, it is never the most important factor relating to value!

Scale usage does differ across countries with regard to value and ratings for value will frequently not fall in line with ratings for satisfaction. The use of value rating scales does differ among countries. Therefore, don't panic if your value ratings in Germany are lower than those in the U.K., despite strong satisfaction scores in both countries. Cultural use of ratings scales may be at play. 🇩🇪

Jane E. Mount submitted this article while acting as president of Digital Research Inc., Kennebunk, Maine. For more information on the study referenced in the story, contact John Leggett ([john.leggett@digitalresearch.com](mailto:john.leggett@digitalresearch.com)) or Kevin Knight ([kevin.knight@digitalresearch.com](mailto:kevin.knight@digitalresearch.com)).

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# From revolution to evolution

The rise of marketing research in China

| By Theo Downes-Le Guin and David Ying Hon Ho



## snapshot

Conversations with three pioneers in the marketing research industry in China chart the past, present and future of MR there.

When Wu Gangmin approached the Commerce Bureau in the early 1980s to register China's first commercial market research firm, officials were confused. Wu recalls their response: "What the heck is that?" At the time, "market" had one meaning: the place you go to buy meats and vegetables. Government officials couldn't understand why anyone would need to research something so familiar and commonplace as a market.

His anecdote illustrates how quickly the industry has evolved. Wu eventually acquired the license and his company, Guangzhou Market Research (GMR), went on to shape research's early days in China.

By now, most of us are inured to the remarkable pace of growth in China. Even in this heady context, however, marketing research stands out. Three decades ago, Chinese academics were just beginning to talk about the Western discipline of marketing. Today, marketing research is an established industry employing tens of thousands and facing a host of challenges and opportunities.

Recent interviews with three long-time industry leaders illuminate this fascinating period in Chinese marketing research. In addition to Wu Gangmin, now CEO of United Research China, we spoke with Chen Jin, CEO (Greater China) of Consumer Search Group and former Chinese CEO of Research International, and Tian Zhi, vice president of Ipsos China and founder of Guangdong General Market Research. Wu and Chen also serve as current presidents of the Chinese Market Research Association (CMRA).

## Evolution of the industry

China's dynastic history lends itself to periodization and marketing research follows this pattern too. Tian lays out three possible ways to look at the evolution of the industry: geographically, methodologically and as an adjunct to political and economic reforms.

The geographic model refers to the beginnings of marketing research in major coastal cities and especially Guangzhou (Canton), where Procter & Gamble has its Chinese headquar-



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ters. Over time, researchers, infrastructure and research needs moved beyond the big three cities (Guangzhou, Beijing and Shanghai) to encompass second- and third-tier cities as well.

A methodological view parallels, in highly compressed form, MR's evolution in the U.S. and Europe. For the early phase, marketing research in both China and Western markets was highly dependent on door-to-door research using sampling frames derived (in the best case) from government mapping projects. Projects were cobbled together by senior staff working with squads of fresh interviewers and data collection and even data processing were heavily dependent on paper-and-pencil. In the U.S., this period lasted from roughly 1935 to the mid-1980s when CATI became the dominant methodology. The same period in China lasted from the 1980s to the start of the new millennium. The subsequent 12 years has seen rapid adoption of CATI and online survey approaches in China, though face-to-face research remains common when compared to any Western market.

Perhaps the intuitive periodization for Westerners, however, mirrors the massive political and economic changes of Deng Xiaoping's second wave of reforms. As Tian describes, the beginning of marketing research in the 1980s benefitted from Deng's reforms because both demand and supply for marketing research emerged for the first time ever. Demand was led by multinationals allowed to operate in China and followed by forward-thinking domestic companies and joint ventures. Prior to that, "...marketing research did not exist in China. When foreign companies entered China, they initially conducted research via Hong Kong," says Tian.

The Tiananmen Square massacre in 1989 cast a rapid chill over market reforms and the nascent research industry was frozen until Deng – who, despite having formally retired, retained supreme political power behind the scenes – made his famous "Southern tour" that reconfirmed support for reforms. "Then," Tian says, "marketing research surged."

Tian describes the third and current phase of Chinese MR as starting in the late 1990s, when regulations on foreign ownership were relaxed and the economic takeoff of coastal urban

China began. Non-Chinese marketing research companies swept in to merge with and acquire local firms that, until that point, had been the only option. Anyone in marketing research for a decade or more in any market worldwide has been touched by this phase, as WPP, Kantar and other major agency employers have actively developed their presence in China.

### Methodological roots

Regardless of which model we choose to understand recent history, the influence of academic and government agencies, and of a handful of major clients, has been substantial in China. Again, this closely parallels the U.S., where the methodological roots of marketing research are closely aligned with certain universities as well as obvious (Bureau of the Census) and less obvious (OSS) government agencies.

Just like Elmo Roper and George Gallup in the U.S., China's early MR talents combined entrepreneurial zeal with strong theoretical training and ties to academia. These early leaders in turn tended to practice research on behalf of the few clients – with P&G a notable power then and now – willing to take risks on and fund novel research methods. Despite these parallel influences, however, an evolution that took over 75 years in the U.S. took just 25 in China.

Many multinational fast-moving consumer goods (FMCGs) companies such as Unilever, Group Danone and Philips entered China and funded research starting in the 1980s. But the influence of P&G on marketing research's development cannot be overemphasized. All three of the executives we interviewed started their careers in no small part thanks to P&G's early patronage of government and academic agencies that incubated early firms like GMR. P&G also sought to bring international standards for data collection and data reduction to this new market. Says Wu, "[P&G] brought professionalism not only to our company but to all of China in terms of research methodology, ideas and marketing concepts ... the well-trained marketing researchers all came out of it. Their veteran employees radiated out and brought expertise to different companies and different parts of China."

Has the development of marketing research in China simply followed economic reforms? Or is there something in Chinese culture that allowed marketing research to take hold so rapidly? Chinese – like Americans – often attribute their success to some form of national exceptionalism. Wu points out that "the concept of doing research before taking actions did exist in ... Chinese culture and history" due in part to Mao's famous quotation that "Without researching, nobody has the right to a voice." But the utility of social science to Mao was naturally filtered through Marxist theory: The goal of research is to understand how to change society and further revolutionary causes. As with so much in China today, it seems doubtful that Mao would find modern marketing research a satisfying by-product of his leadership.

On the other hand, it is easy to see that China's history of building strong networks of relationships to exert influence and accomplish tasks (*guanxi*) goes a long way to explain how marketing research has progressed so quickly. Before the industry existed as such, only relationship-building with government officials could allow researchers to secure permits to conduct studies and form companies. Even meticulous relationship management wasn't always enough. Says Tian, "There were indeed a few episodes when we were taken to the police stations for negotiations."

Once established as a respectable industry, however, this complex system of government, business, local and international relationships has allowed domestic agencies to fluidly form and recombine with each other and eventually with global players. Despite the political threats implicit in an industry whose history lies in measuring public opinion and needs, marketing research seems to have moved past the seeming contradiction of offering capitalistic science in a communist country with relative aplomb.

### Leapfrog competitor

Thanks to the influence of Western FMCGs and academic literature, China defined most of its marketing research systems around the best practices and traditions of global MR. So in many

ways, China should function as a leapfrog competitor – one that has learned from the mistakes of its predecessors, is not burdened by aging capital investments and can thus move quickly to adopt the newest and best technologies where appropriate.

In reality, however, marketing research in China more often looks like low- to middle-quality Western research circa 1985. To be sure, excellent research is done to international standards in China – mostly on behalf of those same FMCGs that designed the industry to their specifications 20 years ago. But quality, authenticity and innovation have always been and remain a major challenge for the Chinese marketing research community. For example, focus groups have been adopted with great zeal in China, despite the fact that many of the qualities that characterize the worst qualitative research in the West (inappropriate use of the method, ill-trained moderators, scamming participants) are rampant in China.

Our interviewees consistently pointed to three areas that challenge quality and jeopardize the credibility of their industry today: changes in respondent behaviors; pricing; and qualified labor supply.

The quick evolution of the research industry has been paralleled by even quicker changes in Chinese mores and social norms. Chen explains that early on, respondents were “simple” ... [they] found marketing research novel and would participate without doubts.” Wu echoes, “People told us what they thought in a straightforward manner, without hesitation. ... Some even were so hospitable that they invited us to stay for dinner.” Today, says Chen, people are less willing to give you their time. Despite the availability of experienced researchers and efficient public transport, completion rates for household interviews continue to decline.

A European or North American researcher who has contended with plummeting response rates and increasing incentive requirements for the past 20 years may offer a wry smile at this point. But Western researchers have also experienced these changes over a longer period and in a gentler way. Just as Chinese MR has gone from fledgling to fully developed in less than three decades, many urban respondents have

progressed from naïve and intrigued to cynical and mistrusting in the same period. Just as it begins to gain critical mass, China’s marketing research industry must cope with a public that often slams the door in its face (literally), expects unfeasibly high incentives or seeks to game the system.


### Taken a toll

Pricing structures for research in China have also taken a toll on the industry’s development and ability to raise the bar on quality of execution. Simply put, many clients (both domestic and international) expect research to be done at prices not dissimilar from 1995 and many agencies feel obliged to comply. To some degree, Chinese MR agencies are locked in a commoditizing price war, says Chen. “Many companies are similar in their ways of doing things. Being too homogeneous ... brings us back to the vicious cycle of pricing and quality concerns.”




P&G’s influence on research in general has extended to pricing structures. First, P&G tends to subcontract only data collection, fostering growth and

professional development mainly in the operationally-oriented commodity end of the market. As well, P&G’s pricing systems focus on cost-per-interview and haven’t evolved a lot in the past two decades, despite order-of-magnitude changes in China’s GDP and labor costs. To some degree, as P&G goes, so go all other clients. “As a result,” says Wu, “the marketing research pricing levels of China are strongly undervalued today. This not only affects local companies, but also makes multinational [research firms] unable to command higher prices.”

Various other factors also contribute to pricing concerns. All of our interviewees remarked that, as the industry has grown larger and more competitive, margin pressures on agencies are universal. Tian also comments that the tradition of clients (at any level in the supply chain) paying vendors only on completion of work places enormous cash flow pressures on smaller vendors. This, in turn, can squelch innovation and lead to a general sense of commoditization throughout the in-



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dustry. Finally, China's habit – common across industries – of throwing large quantities of cheap labor at problems is not ideally suited to high-end services like marketing research, despite the labor-intensive nature of much data collection.

To some degree, all of these trends are present in other areas of the world as well, yet China continues to suffer from one of the most inconsistent quality reputations for marketing research worldwide. Even in markets in which MR is a more established part of the business process, client willingness to pay more for quality has declined sharply in the last two decades. The prevailing philosophy is that agencies should be able to maintain and even raise their game without raising prices, just as most client companies have had to do in their own market segments.

Blaming this on low margins or the pricing expectations of a single, influential client may dodge important issues. With rapid growth and success comes rapid responsibility; China has not moved any faster in marketing research than it has in any other indus-

try to accept international standards of quality and authenticity, despite the best efforts of organizations like the CMRA. And the sheer scale of business in China seems to complicate efforts to promote quality initiatives.

In marketing research, of course, quality ultimately derives from having a corpus of professionals who – through academic and on-the-job training – manage quality research against theory-based best practices. Perhaps the most significant challenge raised by our experts is the availability of qualified MR professionals. Marketing research faces significant – sometimes insurmountable – competition from other, higher-paying professions. Says Chen, "People have high expectations for a promotion path. In six years or so, they demand to be promoted to director level. If you do not make it happen, there are competitors waiting." Wu adds, "At the beginning, their income is lower than in some other industries. So turnover is high. As a result we cannot train up a researcher well so that solid skills are transferred."

## Exciting prospects

Despite these challenges, China offers exciting prospects that differ from more established markets. Over time, influence of domestic clients is likely to change the MR landscape. Companies such as Haier, Lenovo and Huawei continue to expand into international markets; given the propensity of Chinese business leaders to choose domestic companies when possible, their research providers will be along for the ride. According to Chen, "If a local Chinese provider of MR can offer research to [domestic Chinese companies] through a network of research capabilities in different countries globally, they probably will be more inclined to buy from this provider. ... I do not see such a local company yet, but in five or 10 years' time there probably will be."

As well, client-side researchers will increase in sophistication over time. Currently most research expertise rests in agencies and a handful of multinational companies. But as domestic clients increase the spend and sophistication of their research, their staff are likely to become more discerning of research quality and more appreciative of the competitive advantages that high-quality research can confer. Tian expects to see "a better understanding of and culture of MR on the client and agency side."

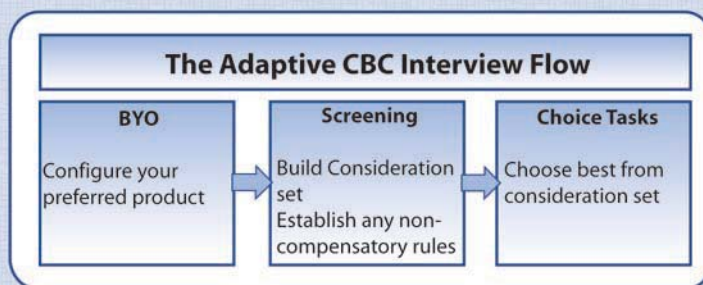
## A fascinating stage

Finally, China remains a fascinating stage for experimentation in new research methods. "I think marketing researchers in China are still trying to see clearly how online and offline methods can work together," explains Wu. Even as much marketing research in China is still best conducted face-to-face, China's youthful population and robust mobile infrastructure points to a pattern of decline in traditional data collection and a rise in mobile and online methods. And rest assured that, like all other changes in China's brief marketing research history, this pattern will be faster, bigger and subtly different from any other market. 

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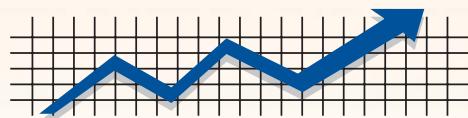
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# Your results may vary

A look at consistency in global non-probabilistic online samples

| By Steve H. Gittelman and Elaine Trimarchi

## snapshot

The authors examine results from a consistency analysis conducted in 13 countries with samples from 10 panel companies to highlight differences in data quality.

Researchers must know if the changes they see in their data are real or artifacts of an inconsistent sample frame. The quality of respondents as measured by their levels of engagement is hypothesized to be correlated with the consistency of data obtained from commercial online panels around the world. To that end, identical tracking studies were conducted among 21 panel companies in 13 countries, represented by 10 companies and a total of 22 panels. A correlation was found to exist between respondent disengagement and the inability of a panel to generate replicable, consistent data using the same survey vehicle.

Consistency of online samples has become a core issue for market researchers. After all, much of the value we provide is in the tracking studies we perform, but even one-time studies should relate to some reference and not float in a sea of variability between panels. If your data changes, it is essential to know if the changes are real or the inadvertent product of sample inconsistency.

In the past, we had no reason to fret over sample consistency. At the core of every research career there is a fundamental reliance on probability. Toss a coin, any coin. It will reliably come up half heads and half tails. There is no magic in it; in the coin toss exercise we are matching to known characteristics.

No one would expect to toss a coin a million times in order to prove its "fairness." Market researchers have drawn samples from known commodities for decades always relying on the fairness of a coin toss. Households could reliably be reached by telephone almost 99 percent of the time and the small fraction of non-phone homes mattered little. Yes, we had to adhere to strict calling regimens, callbacks, refusal conversions and most of all recovering a large percentage of the sample. The key here is that the telephone sample replicated the census because it reached most segments of the population with equal penetration and theoretically equal probability. We knew the composition of the population in advance and could rely on that reference to keep our samples targeted. It



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was reliable, predictable and repeatable and thus consistent; it earned its name: probability sample.

## Began to crumble

As refusal rates began to climb and do-not-call lists became good politics, the ability to reach some segments of the population dwindled. The all-important concept of a high recovery rate began to crumble. Phone, with an increasing percentage of line-cutters and cell phone users, had begun to wane, as its ability to replicate the census was impaired.

Why worry about the census now? Where once research was well-grounded in a probabilistic framework supported by an underlying census of the population, online market research has moved into a new era, from a probabilistic framework to “working without a net.” In the absence of a probabilistic method to anchor samples, non-probabilistic samples can drift without our knowing.

One now-historic example of this happening was presented by Ron Gailey (IIR 2008), now of Coca-Cola, previously of Washington Mutual (WaMu), who disclosed how 29 studies representing 40,000 online interviews had gone astray due to panel inconsistency. In the WaMu research, the change was due to shifts in respondent tenure that resulted from changes in the panel’s constituents over the two-year span of the base research. Gailey’s research showed a 30 percent drop in buyer demand for WaMu’s financial products; a result (2006-7) unsupported by sales. His conclusion, after much study, was that long-term panel members were less optimistic about their purchases than new panel members. Others have since corroborated this finding. The lingering question, now that WaMu is gone, is how the tainted research impacted critical business decisions.

The effects of hyperactive respondents and other online respondent ills were brushed under the rug. Gailey unknowingly had to use a sample that showed aging affects that took time to evolve.

Gailey had to do a lot of digging to find the root problem within his

data. If online samples changed as they aged, then they could not be counted on to provide reliable data through time. And there are a host of factors that could change them. For example, mergers bring together samples of different sourcing and aging profiles. Management makes decisions influencing the frequency of hyperactive respondents by increasing the number of surveys that they are invited to and allowed to complete. It is evident that a panel that is used many times a month is different from one that has new respondents all the time. Panels differ for a wide variety of reasons, many of which are not disclosed to clients since currently there are no standards.

Luckily, there is a world out there of science that has long ago learned to collect data and make decisions based upon sampling frames that are non-probabilistic. When Charles Darwin hauled himself onto the volcanic shores of the Galapagos Islands he took samples of as many islands as he could reach. For the most part, these isolated little islands were different from one another. Even birds that could theoretically fly from one to the next differed. He didn’t have a census to draw his conclusions: He was the census!

Darwin took samples of a few islands and wrote a pretty good book. The samples were not grounded in probability theory and he could not generalize from island to island. Vive la difference! It was the differences that gave him clues. Each island was an ecosystem unto itself and the differences that species on the islands had to endure shaped them into the specialists that they became.

Our use of online data has much to learn from island biogeography. Think of each online panel as an island. They have similarities but are drawn from different sources. We should not expect them to be identical; we should expect them to be different. Our research has shown them to be quite inconsistent (Gittelman and Trimarchi, February 2009 CASRO) and the ARF supports this point. The panels are not interchangeable. The online panels are drawn from different sources, are subject to differing management practices and for a host

of reasons yield different results.

Hidden in all of this is the concept of sample consistency. After all, if we measure bias and can’t anticipate its shifts over time, then we will not understand which changes are coming from our data or from background noise in the sample. Thus, the ARF announced in June 2009 that the issue of consistency was its most important area of concern. We must learn to measure not only what the constituent elements of our data sources are but also how they change over time. In other words, we have to enter a new world of replicable methods for consistency analysis.

As we do our research, we must know what the changes in our data mean. Are they the product of shifts in opinions or changes in the sampling frame? To get a grip on this we need parallel studies that document the consistency of our samples.

## A complex concept

Consistency is a complex concept. We need to know the differences between panels at any given moment so that we can understand how the panel we use changes through time and events, confidently switch to a different panel or use multiple panels in our research. Blending samples is a good way of spreading risk among many to avoid the potential ills of just one. Be prepared for the use of sample blending techniques to become an industry standard for achieving consistency around the globe.

We have moved onward from our initial tracking study of the American markets (Gittelman and Trimarchi, 2009) and have expanded our research to include over 200 panels in 35 nations. In each, a standard translated instrument was used that included a diversity of measures but mostly focused on buying behavior segmentations. By conducting repeated waves of this consistency tracking study, a local grand mean was calculated for each market (for more on the grand mean project, visit [www.quirks.com/articles/2009/20091107.aspx](http://www.quirks.com/articles/2009/20091107.aspx)). In addition, using standard quality-control techniques, an analysis of the consistency of each panel was conducted.

It is quite predictable that buying behavior will shift on a seasonal ba-

sis. It is also predictable that the ice will melt in spring and that the rains will come. We bet on it all the time. They say that the only things that you can count on are death and taxes – wrong! Predictability is as much a part of consistency as is reliability. Consistency does not mean staying the same but rather having predictable patterns of change. The U.S. census did not provide us with that.

If all panels were required by their users to show that they were consistent, we would have both a measure of quality in their samples as well as a new set of indices to replace the absence of a usable online census. Certainly, if all panels provided data on how their members responded to a battery of purchasing questions and the segmentations were tracked, Ron Gailey would have had a reference to consider when his panel's composition began to change. The census has very little relationship to the online community and even less to the online community that participates in panels. The offline population is different from those online and the panels themselves are a disparate group with almost no guiding standards. The whole process of belonging to a panel filters out an unknown sector of the population and no one knows how to weight them or what problematic and unweightable variables might be hidden in the data.

We test panels regularly for consistency: each participates in at least three waves of audit separated by a minimum of three months. This provides end users with assurances regarding the stability of panel output.

In this article, we summarize the results of consistency analysis conducted in 13 countries: Australia, Brazil, Canada, China, France, Germany, India, Italy, Netherlands, Russia, Spain, United Kingdom and the United States. A total of 10 panel companies contributed to the effort.

Inconsistent data is either the product of real changes in the underlying phenomena that are being measured or driven by the data collection method. The former is clearly not a problem while the latter clearly is.

Here we use demographically balanced populations (age, gender, income) from wave to wave, an iden-

tical questionnaire instrument and track data changes within a single panel. We use two methods of data collection, one where the cooperating panel is informed of our efforts and the second where the sample source is blind.

We divide our target countries into those where online penetration is high and online research is well-established and those where online penetration is low and online research is a relatively new endeavor.

The identity of participating companies has been kept confidential.

## Methods

### Question types

Analysis was based on response to questions on three types of information:

- **Demographics** (including age, income, education and marital status distribution) reflect the traditional classification of respondents. Note that some of these variables were used to quota-control the sample. As such, they measure the consistency of the quota process.
- **Structural segments** (based on buyer behavior, sociographic issues and media use) reflect the cultural, social and behavioral characteristics of the respondents. These segmentation schemes may vary between countries and regions. They should be more consistent within countries and within panels over time.
- **Source performance** (including erroneous, professional and satisficing behavior metrics) may reflect the quality of survey results. These include the issues of incorrect responses, speeding through the survey and frequently participating in surveys.

Two references are used to gauge the consistency of results: overall average response within source (local mean) and the external grand mean representing the average responses for a standard questionnaire over a number of sources. The grand mean references have been collected by country and are used only within the country to evaluate panels.

Consistency is evaluated as a comparison with the average values

for a given panel across all waves of the consistency analysis. Large deviations from the average are labeled as inconsistencies. The grand mean exists purely as a point of reference to our estimate of a country's "actual" population value. The reliability of this estimate varies according to the amount of data and diversity of sources collected within that country.

### References and error bounds

The internal reference for analysis is based on a moving average of the data series. As more data in the series is available, the average reference values are expected to become increasingly stable. All variations are assumed to be associated only with the tested panel. References are treated as population values, with no error bounds. Eliminating this source of error results in a decrease in the error bound, making this analysis somewhat more conservative.

### Distribution metrics

Differences between values within the data are tested and depicted using the following methods:

**Variation and error.** Stacked bar charts are used to show the time series results of the sample set along with the appropriate references. Error bounds at two standard errors around the components are also shown to illustrate relative importance of differences. As previously noted, all error is assumed to be associated with the panels being examined.

**Distance measure of variation.** The root-mean-square distance measure is used to indicate the degree of separation between two samples. (The root-mean-square distance is defined as the square root of the average of square of the differences between the distributions elements.) In a broad sense, it can be approximated as the "average" percent deviation from the panel average on a given metric.

### Behavioral segment distributions

Typically, panels and lists are filtered to balance demographics against some external standard such as the known general population. However, demographics do not account for every

attribute of importance to market researchers. In an attempt to account for the behavioral attributes of respondents as well, we introduced three segmentation schemes, determined through cluster analysis on an array of 62 consumer behavioral variables.

Three segmentation schemes are being used in this evaluation, focusing on 1) buyer behavior, 2) sociographic factors and 3) media use factors.

### Buyer behavior segments

The buyer behavior segments are intended to capture the variability in the attitudes and actions regarding the purchase of a broad range of products. The standardized profiles for the selected U.S. sources are shown below and reflect the response to 37 input variables.

The titles of the segments reflect the strongest loading variables making up the segment. The purpose of this scheme is to reflect differences between sources of data and the general grand mean representing that

region. The distribution of these segments can vary widely between different countries and global regions. These are expected cultural variations. However, we expect the distribution of these segments among panel and sources of data within regions to be less variable. Furthermore, the distribution of segments should be consistent over time within a panel or source, assuming sampling methods remain constant.

### Source performance metrics

Aside from the behavioral profiles of our respondents, their survey-taking behaviors are also of interest to us. These extend to questions of both quality (or engagement) and of hyperactivity.

**Hyperactivity.** Hyperactivity reflects the frequency of survey-taking by the participants in the panels. In general, these focus on issues and concerns with the long-term maintenance and in particular the tendency to contain professional participants. These metrics may include participants who belong to multiple panels,

have been on panels for an extended period of time or who take surveys frequently.

**Trap questions.** The incidence of errors in the execution of questionnaires reflects the quality of the panel. These are checks designed into the testing instrument. They include but are not limited to inconsistency in responding to multiple questions and the failure to follow instructions.

**Satisficing.** Some respondents can exhibit behaviors that put their responses in doubt without failing trap questions. These include: 1) speeders, who finish their questionnaire in an extraordinarily short time and 2) straightliners, who tend to give the same answer to a large number of questions. These are not errors, just extreme behavior that provides a warning of potential problems.

### Hyperactivity (frequent survey-takers)

A concern regarding online panels is the development of professional survey takers. These are members of the panel or data sources that are fre-

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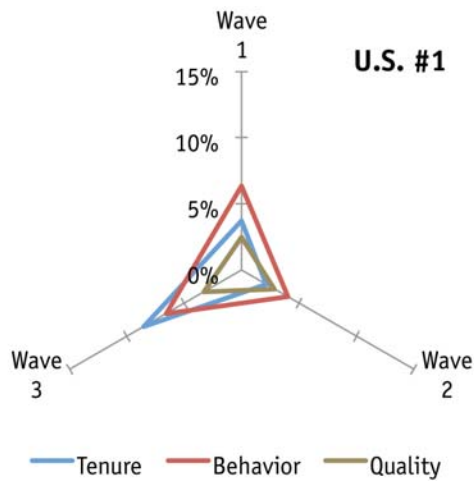


Figure 1: Radar chart for consistency testing on an American panel.

quent survey-takers. The frequency of professionals is estimated in terms of four measures: 1) belonging to five or more panels, 2) taking surveys almost every day, 3) having taken at least 30 surveys in the past month and 4) panel tenure. All of these are self-assessments and as such may be in error but they represent consistent metrics.

### Satisficing behavior (speeders and straightliners)

Because of the nature of online surveys, participants may delay execution and thereby run up huge apparent elapsed times. Typically these long times are removed for analysis. Speeders are those who finish the questionnaire very fast. Generally for our test instrument that is less than an overall lower 10 percentile.

Similarly, straightliners are defined based on the lack of variation in their responses. For the purposes of analysis, the standard deviation over a range of similar questions is used to estimate variation. Straightliners are defined for this analysis as respondents with a selected standard deviation of one unit (out of seven) or less for 30 questions.

### Q-Metrics

The quality segments are based on the number of faults recorded on the above metrics including errors, professional behavior or satisficing. There are six indicators in this estimation: three performance measures, one measure of professionalism and the two measures of satisficing behavior. Four segments are used corresponding to: 1) no error, 2) one error, 3) two errors and 4) three or more errors. In this context, it is the third and fourth segment which are of the greatest concern since they represent those who are most likely to give erroneous responses.

### Results

Figure 1 displays panel consistency for an American panel, which by our measures proved to be fairly inconsistent. The radar chart tracks changes in our behavioral segmentations in panel tenure and in quality metrics from the panel's overall average across the multiple waves of profiling. The behavioral segmentations

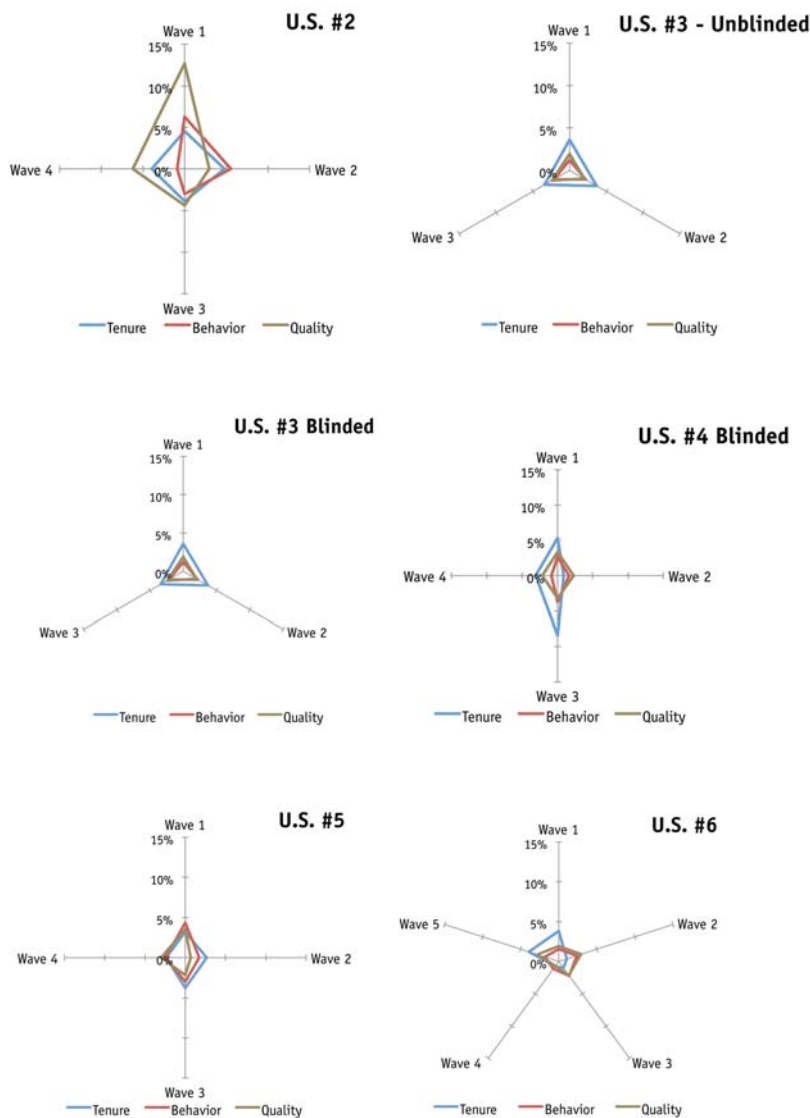


Figure 2: Variability over time in U.S. panels (0% represents the panel average).

(shown in olive).

Figure 2 indicates the results of other consistency tests we have undertaken in the U.S. Across six more panels, we are generally quite pleased with the level of consistency we have seen. In those cases where there are incongruities, however, the relative congruity of the deviations makes it quite clear that changes in one's data do not occur at random. Shifts in the behavioral profile of a panel are almost accompanied by a change in overall respondent quality, a change in respondents' panel tenure or both. The relative congruity of these changes is striking.

Another finding that we feel validates our method is the relative similarity of blinded and unblinded results. If panel companies were manipulating their sample so as to pass our consistency testing, we would expect to see a vast difference between data when the panels knew we were testing and when they did not. As it is, the results seem very comparable in either case, indicating a good-faith effort on the part of the panel companies to represent themselves accurately.

Now let's take a look at consistency in other Western panels. Though there are some hints of variability here and there, by and large it seems apparent that panel companies can achieve a consistent sample in most developed nations. Here the relatively low levels of unengaged respondents, coupled with stable sourcing, generate a picture of consistency (Figure 3).

The BRIC countries (Brazil, Russia, India and China) represent a significant challenge to market research data collection firms. Although this Brazilian panel (Figure 4) appears to have begun the analysis with highly-engaged respondents, the two lowest-quality segments of respondents are rapidly growing. Concurrently there appears to be an inherent instability in the behavioral segmentations. We do not believe that this change is reflected in the population as a whole. These data indicate an increasingly unengaged population within the panel that is behaviorally in flux. This is likely to be due to a combination of increased respondent tenure

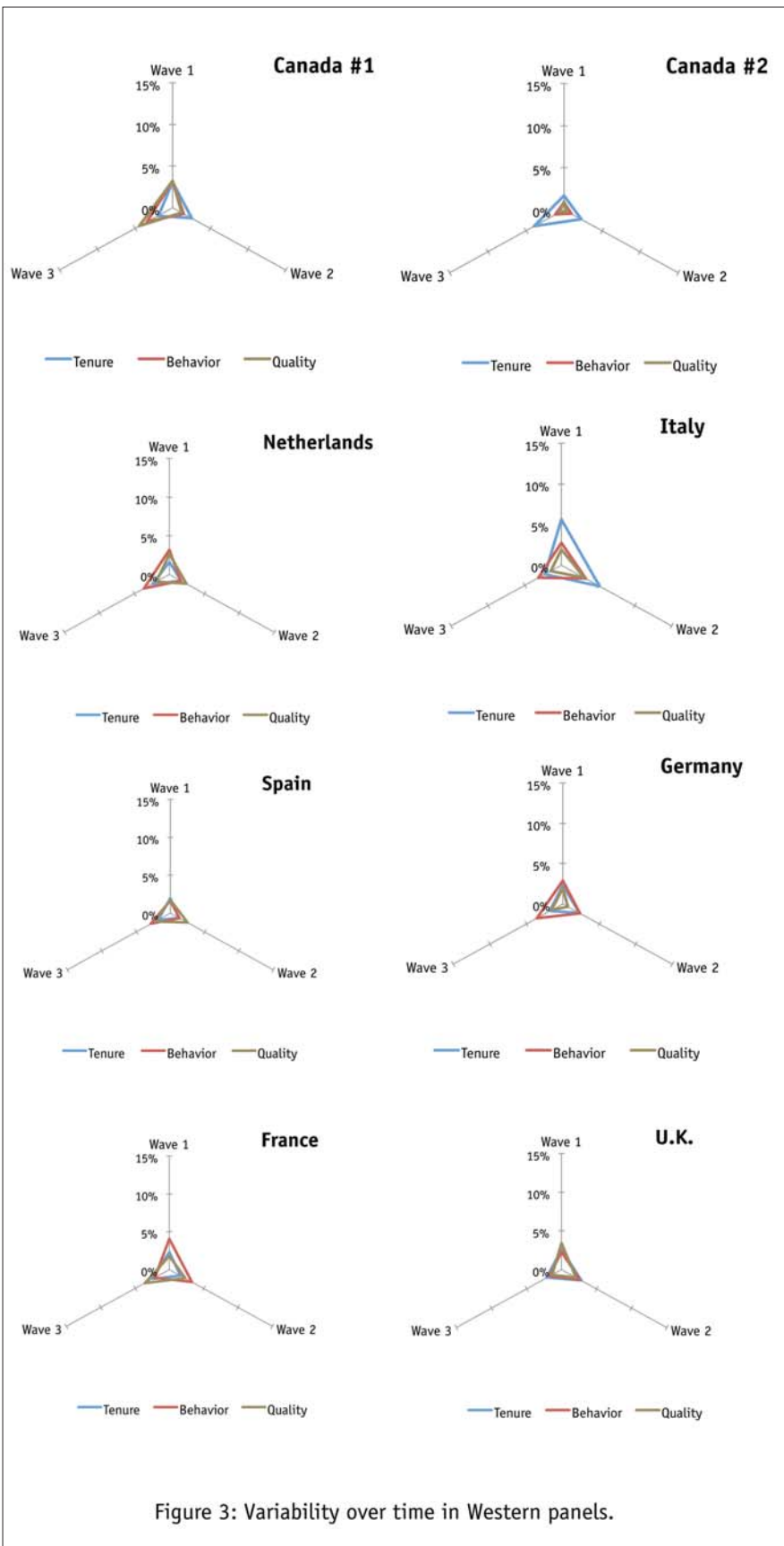


Figure 3: Variability over time in Western panels.

(shown in red) showed significant variability, particularly in waves one and three, as indicated by deviations from the average (the origin). These shifts were accompanied by changes

in the panel tenure of the respondents used (shown in blue). The engagement levels of the respondents, as indicated by our QMetrics scale, remained consistent throughout



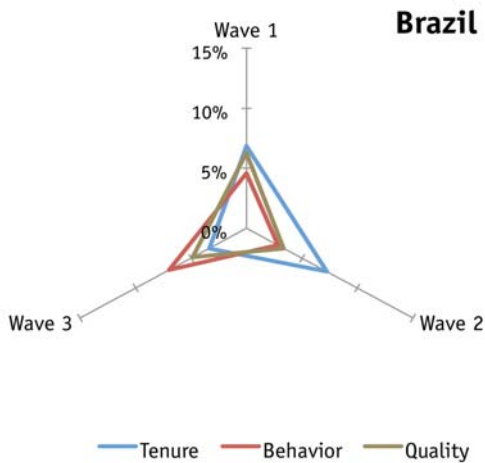


Figure 4: Results of a Brazilian consistency analysis (data on all three measures is highly unstable).

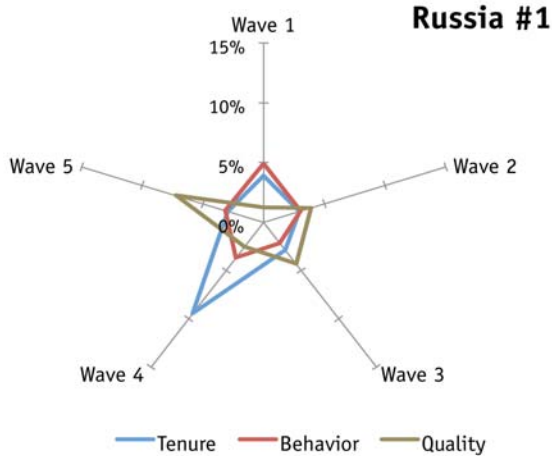


Figure 5: Consistency in a Russian panel.

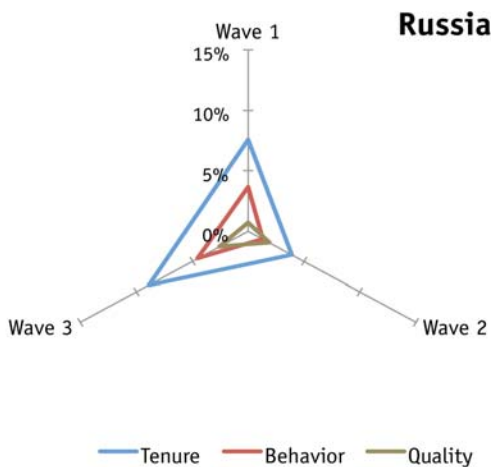


Figure 6: Consistency in a second Russian panel.

coupled with the introduction of new sources. One would have to use extreme caution in launching studies with this panel.

Looking at Figures 5 and 6, we find Russian panels to consist of highly engaged respondents. As the number of waves in a consistency analysis increases, it becomes harder to stay within the decreasing error bound. On the standards of analysis with fewer waves of testing, this panel is relatively stable.

Figure 7 shows that no country thus far confronts us with greater inconsistency than does in India. In this case, the participating panel made every effort to stabilize the data from wave to wave. But it's quite evident consistency was seemingly unobtainable. We doubt this was the product of management inattentiveness as seemingly every piece of sample was scrutinized.

Next we draw your attention to Figure 8's QMetric scores, where we experience massive inconsistencies in quality ratings, as well as high numbers of disengaged respondents. Under these circumstances, the data flow is unlikely to be stable and the panel source should have considerable difficulty in passing the hurdle of a consistency test – as is proven by the distortions in the behavioral distribution. The congruity between the inconsistencies in behavior and in quality is strikingly close.

If data instability approaches an almost random condition, the data obtained is useless if not dangerous for research practitioners to use.

Our hypothesis states that behavioral variability will likely result from changing quality and panel tenure. However, as can be seen in Figure 9, the case of China seems to be an exception to our rule. In our Chinese consistency test, the participating panel was unable to meet the age, income and gender quotas that we normally require. By restricting the demography, they in turn reduced the potential for variability. This may be why their data appears consistent despite high instability in tenure and somewhat high variability in quality.

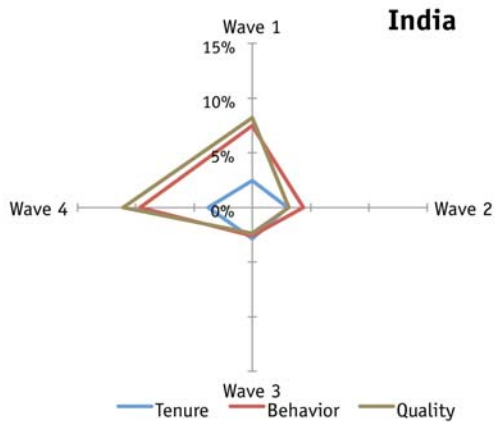


Figure 7: Highly inconsistent results in an Indian panel (panel management was aware that the test was being conducted).

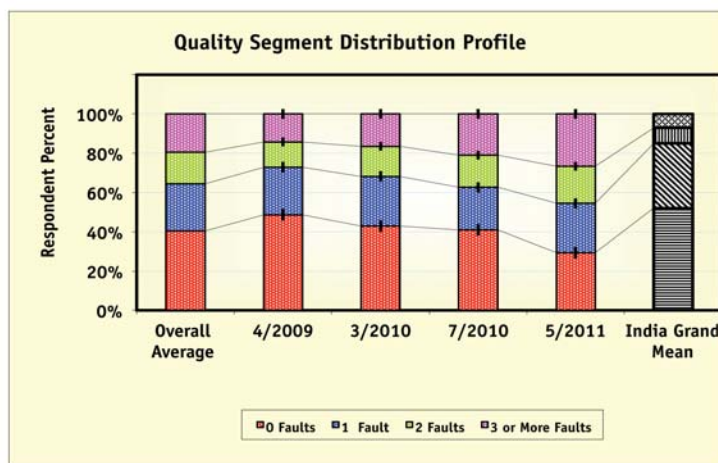


Figure 8: QMetrics showed that respondents in India were of lower quality than anywhere else we have profiled. In the last wave, 26 percent of respondents failed three tests or more.

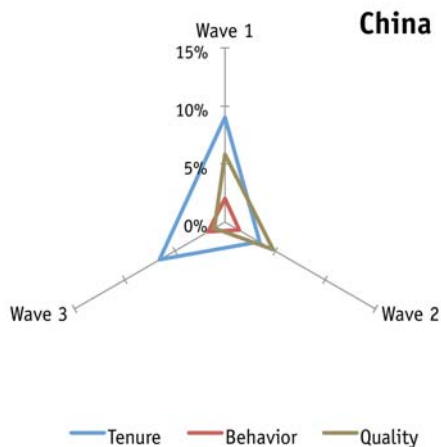


Figure 9: An apparently consistent Chinese panel. As the demography was narrowly limited, we believe that the consistent behavioral results are an artifact of poor project management.

## Vary drastically

Respondent engagement is an important component of respondent quality. All respondents across these studies were administered identical translated questionnaires and yet levels of engagement vary drastically across panels. The causes of these differences are myriad and best explored elsewhere (see our article in the December *Quirk's*) but perhaps the consequences are in question.

The importance of a consistent sample frame is easily grasped – a panel company must be able to provide consistent results to questions with stable population values or else changes in more dynamic variables will be difficult to interpret. In the pursuit of consistency, disengagement plays a vital role. If respondents are answering in any way randomly it is extremely unlikely their responses will be useful or replicable. Since this error is theoretically random and not systematic, it may not necessarily cause changes in overall means. But this error can manifest itself in fluctuations that could easily be misinterpreted as meaningful. In essence, researchers must know if the changes they see in their data are real or artifacts of an inconsistent sample frame. <sup>11</sup>

## REFERENCES

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Pete is Part of the

# DISCUSSION

**Wherever Research Issues are Debated.**

When SSI Knowledge Director Pete Cape talks, researchers listen. Pete is invited to present to researchers across the globe and to set quality standards for our industry. He keeps the SSI teams up-to-date on topics like router methodology, respondent quality, questionnaire design and sample consistency, so your projects benefit from the latest thinking and techniques. And as a member of SSI's dedicated Knowledge Team, Pete makes sure all SSI products have rigorous methodology built right in. How important is the science of sampling in achieving high-quality research results? Pete would say it's essential: end of discussion.



Pete Cape

Just one of the people  
working for you at SSI.



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# Q

## Names of Note

■ **Kevin Reilly** has been promoted to chairman of entertainment at *Fox Broadcasting Company*, Beverly Hills, Calif. Research will be among his responsibilities.

■ *Vital Insights*, a Mississauga, Ontario, research company, has named **Joerg Hoehner** managing director, Europe, Middle East and Africa.



Hoehner

■ *Eastbridge Consulting Group*, an Avon, Conn., marketing advisory firm, has hired **Ginger Bates** as director, research.

■ San Francisco research company *watchLAB* has hired **Bart Hofford** as director, field services.



Hofford

■ **Camille Nicita** has been appointed president and CEO of *Gongos Research*, Auburn Hills, Mich.

■ Needham, Mass., research company *in4mation insights* has hired **Susan Bertenthal** as senior director, practice lead, category management and insights; **Jonathan Poeder** as director,

marketing science; **Tianjiao Han** and **Scott Layton** as analyst, marketing science; and **Ryan Griffin** as software engineer, information engineering and high-performance computing.

■ **Ingmar Gutberlet** has been named director, sales and marketing, at Berlin research company *SensoMotoric Instruments*.

■ Chicago research company *SymphonyIRI Group Inc.* has appointed **Beverly A. Grant** as president, retail solutions.



Marchesi

■ Farmington Hills, Mich., research company *Morpac Inc.* has hired **Cathy Marchesi** as research director, automotive; **Jeffrey Dodge** as research director, technology; and **Julie Vogel** as vice president, online communities, automotive. Vogel will be based in Boston.



Dodge

■ **Drew Canapary** has joined *Outsource Research Consulting*, Aptos, Calif., as partner. Canapary will lead the company's customer loyalty research division.



Vogel

■ Portland, Ore., research company *Revelation* has appointed **Jim Hornor** as lead methodologist and **Julie Gagliardi** as director, sales, Atlantic Northeast.

■ *KJT Group*, a Honeoye Falls, N.Y., research company, has promoted **Michaela Gascon** to CFO and **Lynn Clement** to chief of staff. Gascon will continue to serve as research director, health care, and Clement will continue to serve as vice president, research.

■ **Ken Wikler** has joined Norwalk, Conn., research company *Bell, Falla and Associates* as executive director, qualitative research.



Wikler

■ *Bellomy Research*, Winston-Salem, N.C., has appointed **Kaye Young** as senior vice president, retail and category leadership.



Young

■ Columbia, Md., research company *Arbitron Inc.* has appointed **Sean R. Creamer** to its board of directors. Additionally, **Manish Bhatia** has been named executive vice president, new product innovation. Bhatia will be based in New York.

■ *The Phelps Group*, a Santa Monica, Calif., research company, has promoted **Jason Chiem** to media coordinator; **Claudio De Laurentiis** to art director; and **Nat Wilkes** to team coordinator.

■ **Scott Miller** has been named group CEO of Vancouver, B.C., research company *Vision Critical*. Miller will be based in New York and will also join the company's board of directors. Additionally, *Vision Critical* has hired **Jim Cravens** as executive vice president, global human resources, and **Michelle Carter** as head of client services, U.K.



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Carter will be based in London.

■ *M/A/R/C Research*, Irving, Texas, has promoted **Alice Butler** and **Patricia Wakim** to senior vice president.

■ San Ramon, Calif., job services company *eQuest* has appointed **David Bernstein** as vice president, big data.

■ *Point Consultancy*, a Dubai, United Arab Emirates, research company, has hired **Henry Beales** as business solutions consultant.



Beales

■ Nuremberg, Germany, research company *The GfK Group* has hired **Tom Neri** as senior vice president, customer loyalty. Neri will be based in New York. Additionally, GfK has appointed seven senior leaders in China, Korea, Malaysia and Japan: **Kyungeun Chang**, managing director, GfK Korea; **Selinna Chin**, general manager, GfK consumer choices, Malaysia; **Yoshi Fujibayashi**, managing director, GfK consumer choices, Japan; **Nehal Medh**, managing director, GfK consumer experiences, Singapore; **Ashok Sethi**, director, regional development, Asia and the Pacific; **Eliza Wong**, managing director, Hong Kong and Taiwan, and head of operations for Greater China; and **Alfred Zhou**, general manager, GfK consumer choices, China.

■ **Tim Willke** has joined *Perception Research Services International*, Fort Lee, N.J., as executive vice president.



Willke

■ *Illumination Research*, Mason, Ohio, has hired **Jennifer Holt** as director, marketing and new business development, and **Heather Smith** as director, insight strategy.

■ **Kyla DeForest** has been selected for an internship at *CORE Insights Research and Marketing Strategy*, Boulder, Colo.

■ London research company *Verve* has made the following appointments: **Karen Alexander** and **Sallie Furness**, senior research executive; **Claire Long**, senior com-



Alexander



Furness



Long

munity manager; **Julie Agbonifo**, community manager; **Lysbeth Plas**, qualitative research executive; **Susanna**



Agbonifo



Plas

**Pecyna**, **Patricia Pinakova** and **Poppy Taylor**, community panel manager; **Ade Oshunbade**, quality assurance manager; and **Rafael Portas**, survey scrip-ter.

■ New York research company *Kantar Health* has promoted **Graeme Jacombs** to managing director, Asia-Pacific, Middle East and Africa.

■ *All Global*, a New York research company, has hired **Amber Leila Esco** as vice president, business development.

■ San Francisco research company *Symphony Advanced Media* has named **Charles Buchwalter** president and CEO.

■ New York public relations firm *Edelman* has named **Michael J. Berland** CEO of *Edelman Berland*, the firm's research and analytics business.

■ New York research company

*PlayScience* has hired **Carly Shuler** as strategy lead and **Brittney Huntington** and **Emily Schlemmer** as research associate.

■ **Tony Uphoff** and **Scott Schulman** have joined the strategic advisory board for *Connotate Inc.*, a New Brunswick, N.J., research company.

■ *Constellation Research Inc.*, Sydney, Australia, has hired **Gavin Heaton** as vice president and principal analyst.

■ **Emily Hunt** has joined New York research company *StrategyOne* as director, insights. Hunt will be based in London.

■ **Jack Korte** has been named vice president, client services, at *Repass and Partners Inc.*, a Cincinnati research company.



Korte

■ *ICM Research*, London, has appointed **Teresa Lynch** director, data services.

■ Paris research company *Ipsos* has made the following appointments: **Yannick Carriou**, chief executive, *Ipsos MediaCT*; **Richard Silman**, head of corporate and social responsibility programs; and **Dominique Lévy-Saragossi**, country manager, *Ipsos France*.

■ **Ronald Meier** has been named sales director, Europe, at *uSamp*, an Encino, Calif., research company.

■ Cincinnati research company *dunnhumbyUSA* has named **Dave Palm** senior vice president, operations; and **Rex Davis** head of operations, India.

■ *Mintel Group Ltd.*, a London research company, has appointed **Emmanuelle Moeglin** as global fragrance analyst.

■ *Schlesinger Associates*, an Iselin, N.J., research company, has hired **Laura Haxton-Wilde** as managing director, *The Research House*, in the U.K. **Sue Maldonado**, former managing director, will remain with the company as vice president, global marketing.

# Q

## Research Industry News

### News notes

■ The United States government has joined a whistleblower lawsuit against **The Gallup Organization**, Washington, D.C., according to an August 22 statement from the Justice Department. The lawsuit was filed by Michael Lindley, a former Gallup employee, who alleges that Gallup violated the False Claims Act by making false claims for payment under contracts with the U.S. Mint, the State Department and other federal agencies to provide polling services for various government programs.

According to the whistleblower's complaint, Gallup violated the False Claims Act by giving the government inflated estimates of the number of hours that it would take to perform its services, even though it had separate and lower internal estimates of the number of hours that would be required. The complaint further alleges that the government paid Gallup based on the inflated estimates.

### Acquisitions/transactions

■ Westminster, Colo., research company **Datalogix** has acquired **Connection Engine**, a Summit, N.J., research company.

■ **Deltek Inc.**, a Herndon, Va., provider of enterprise software and information solutions, has been acquired by Chicago private equity investment firm **Thoma Bravo LLC** for approximately \$1.1 billion. Following the closing of the deal, Deltek will become a privately-held company. Deltek will remain headquartered in Herndon and led by its exist-

ing senior management team.

■ Danbury, Conn., research company **IMS Health** has acquired **PharmaDeals Ltd.**, an Oxford, U.K., business information company. PharmaDeals will become part of IMS's syndicated analytics and insights.

■ Seattle research company **QuestionPro** has acquired New Orleans research company **Pollbob**.

■ Nuremberg, Germany, research company **The GfK Group** has acquired **User Centric Inc.**, an Oakbrook Terrace, Ill., research company.

■ Oslo, Norway, research software company **Confirmit** has acquired **CustomerSat**, San Francisco research company **MarketTools Inc.**'s enterprise feedback management software and services provider.

### Alliances/strategic partnerships

■ **Kinesis Survey Technologies LLC**, Austin, Texas, and New Orleans research company **Federated Sample** have partnered to integrate their product offerings. The initial phase of integration will enable Kinesis Panel clients to optimize their market research sample within Federated Sample's Fulcrum solution directly from Kinesis' user interface. Longer-term integration will support the acquisition of augmented sample from Fulcrum via the Kinesis platform and allow the use of customizable routing tools for online survey research.

■ Research companies **Arbitron Inc.**, Columbia, Md., and **comScore Inc.**, Reston, Va., have partnered to develop a five-platform measurement initiative to assess changing consumption of video, audio and display content across radio, television, PCs, smartphones and tablets. **ESPN**, Bristol, Conn., will collaborate on the design and participate as its charter client.

■ Research companies **Cint**, Stockholm, Sweden, and **Voxco**, Montreal, have partnered to integrate Cint Link into

Voxco's Acuity4 Survey platform to provide Voxco customers with access to Cint's OpinionHUB.

■ New York media technology company **PulsePoint** has formed an alliance with Chicago research company **SymphonyIRI Group Inc.** to combine PulseAudience, PulsePoint's real-time audience measurement solution, and SymphonyIRI's Consumer Network household panel and InfoScan Tracking Service for point-of-sale data.

### Association/organization news

■ Amsterdam, Netherland, research association **ESOMAR** has launched a new corporate membership initiative, allowing companies as well as individuals to become members. Eight companies have signed up as Founder Members: InSites Consulting, Altria Client Services, B2B International, Basis Group, BrainJuicer Group, MAP Market Research, Psyma and SKIM.

■ **The European Federation of Associations of Market Research Organizations**, Brussels, Belgium, and the **European Research Federation** have agreed to build a European self-regulation system for market, social and opinion research to promote comprehensive and coordinated self-regulation of research across 15 countries.

### Awards/rankings

■ **SSI**, a Shelton, Conn., research company, announced the winners of the third-annual SSI QUEST Awards, which honor companies for creating the most engaging research experiences, at the annual ESOMAR Congress in Atlanta in September. Three research companies were recognized as overall winners for excellence in survey design: **Qualtrics Labs Inc.** in the Americas; **Sinomonitor** in Asia Pacific; and **BDRC Continental** in Europe. Top honors for product placement surveys went to **deKadt Marketing and Research** in the Americas and **MMR Research Worldwide** in Europe. The 2012 Best in QUEST Award went to **Sinomonitor**.



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■ New York research company **Kantar Health** has won Best Podium Presentation at the Lawrenceville, N.J., research association **International Society for Pharmacoeconomics and Outcomes Research's** Asia-Pacific conference. "The Effect of Neuropathic Pain on Health Status, Work Productivity Loss and Healthcare Resource Use in Japan" was presented by Andy Stankus of Kantar Health and was based on research conducted by Kantar Health in conjunction with the National Institute of Public Health in Saitama, Japan.

■ London research company **BrainJuicer Group PLC** received the Fernanda Monti Award for Best Paper Overall at the 2012 annual ESOMAR Congress in Atlanta in September. The paper, "Research In A World Without Questions," written by BrainJuicer's Tom Ewing and Allstate's Bob Pankauskas, explores the extent to which researchers can uncover insight without asking direct questions.

■ Research companies **Optimal Strategix Group**, Newtown, Pa.; **uSamp**, Encino, Calif.; and **Decipher Inc.**, Fresno, Calif., have been named to *Inc.* magazine's annual Inc. 500|5000, which ranks the nation's fastest-growing private companies based on percentage revenue growth from 2008 to 2011.

### New accounts/projects

■ Research organization **NORC at the University of Chicago** has selected Montreal research company **Voxco's** Command Center data collection platform for its research data gathering and survey capabilities.

Additionally, Voxco's Command Center and PRONTO predictive dialing system have been adopted by New York research company **Abt SRBI**.

■ **American Directions Group**, a Gainesville, Fla., research company, has expanded its survey research capabilities via an award by the U.S. Government General Services Administration of a five-year MOBIS Multiple Award Schedule Contract for market research survey services.

■ New Orleans research company **Federated Sample's** respondent exchange platform Fulcrum has been adopted by **Ugam Research**, Mumbai, India.

■ Grocery chain **Supervalu Inc.**, Eden Prairie, Minn., has selected Toronto research company **LoyaltyOne's** Precima analytics solution to develop its customer segmentation.

■ Fresno, Calif., research company **Decipher Inc.** has integrated Palo Alto, Calif., research company **SurveyMonkey's** TrueSample data quality solution into its Beacon market research platform.

### New companies/new divisions/relocations/expansions

■ Caroline Florence has launched **Insight Narrator**, a U.K., research company. The company is online at [www.insight-narrator.co.uk](http://www.insight-narrator.co.uk).

■ Jeff Green has opened **Stone Door Media Lab**, a Nashville, Tenn., research company serving the music industry. The company is online at [www.stonedoormedialab.com](http://www.stonedoormedialab.com).

■ Jessica Cameron has launched **User Crunch**, a San Francisco research consulting business. The company is online at [www.usercrunch.com](http://www.usercrunch.com).

■ Becca Kornet and Charley Hajduk have formed **Helical Research**. The company is online at [www.helicalresearch.com](http://www.helicalresearch.com).

■ **Market Sensory Solutions**, an India research company, has opened its doors for business. The company is online at [www.mss-mrs.com](http://www.mss-mrs.com).

■ New York research company **PlayScience** has opened its first **PlayLab** in downtown Manhattan. The PlayLab is designed to be a kid- and family-friendly research and incubation facility. The PlayLab is online at [www.letsplaylab.com](http://www.letsplaylab.com).

■ Honeoye Falls, N.Y., research company **KJT Group Inc.** has established its first European office in Amsterdam, the Netherlands.

■ **The Research Partnership**, London, has opened a market access consultancy called **The Access Partnership**, serving the pharmaceutical, biotech and med-tech industries.

■ **InSites Consulting**, a Ghent, Belgium, research company, has launched **B-Conversational**, a division focused

on coaching companies on conversation management. Steven Van Belleghem will lead the operation.

■ Salt Lake City research company **The Modellers** has opened **ModHub**, a division created to provide focused analytics services. The company is online at [www.themodhub.com](http://www.themodhub.com).

■ London research company **BrainJuicer Group PLC** has opened an office in India to provide client-facing support.

■ Tokyo research company **AIP Corporation** has opened an office in New Delhi. Roy Kimura has been appointed to lead the operation.

■ New York research company **Hall & Partners** has launched its dedicated qualitative research viewing facility, **The Room**, in London and New York.

■ Research company **i-view London** has opened a new research viewing facility in London.

■ **GMO Internet Group Company, GMO Research** and **GMO Japan Market Intelligence**, Tokyo, have opened an operations center in India. Anupam Kaul will head the office.

■ **Stamats Healthcare Marketing**, a Cedar Rapids, Iowa, research company, has launched a division dedicated to delivering strategic insight, planning and successful outcomes to the medical industry.

■ **IntelliQ Research and Strategy Inc.**, Cincinnati, has relocated its State College, Pa., office and corporate call center to the SunPointe Business Center.

■ Shelton, Conn., research company **SSI** has entered into a joint venture with **Interresearch**, Copenhagen, Denmark, to form **SSI Denmark**.

### Research company earnings/financial news

■ **BrainJuicer Group PLC**, London, reported 14 percent revenue growth for the six months ended June 30, 2012.

■ **Vision Critical**, Vancouver, B.C., completed a \$20 million investment from OMERS Ventures.

# CALENDAR OF EVENTS

●●● can't-miss activities

**The Research Club** will host a free networking event on **November 29** at 6:30 p.m. at the Vanity Bar in **Cologne, Germany**. The event is open to all. To register, visit [www.theresearchclub.com/events/cologne](http://www.theresearchclub.com/events/cologne).

**Strategic Solutions** will hold a conference, themed "Social, Local and Mobile Market Research Innovations Congress," on **December 4-5** in **San Francisco**. For more information visit [www.marketresearchinnovations.com](http://www.marketresearchinnovations.com).

**The International Quality and Productivity Center** will hold its annual CMO Exchange conference, themed "Transcending Technology and Championing Marketing Innovation in a Digital World," on **January 27-29** in **Miami**. For more information visit [http://www.cmo-exchangeusa.com/Event.aspx?id=790850&CMOE\\_MP\\_Quirks](http://www.cmo-exchangeusa.com/Event.aspx?id=790850&CMOE_MP_Quirks).

**The Mobile Marketing Research Association** will hold its general assembly, themed "Shaping the Future of Mobile Marketing Research," on **January 31** in **Kuala Lumpur, Malaysia**. For more information visit [www.mmra-global.org](http://www.mmra-global.org).

**The Marketing Research Association** will hold its annual CEO summit on **February 25-27** at the Fairmont Turnberry Isle in **Miami**. For more information visit [www.marketingresearch.org/summit](http://www.marketingresearch.org/summit).

**The Council of American Survey Research Organizations** will hold its annual online research conference on **March 7-8** at the Westin **San Francisco**. For more information visit [www.casro.org](http://www.casro.org).

**The Pharmaceutical Marketing Research Group** will hold its annual national conference on **March 10-12** at Gaylord National in **National Harbor,**

**Md.** For more information visit [www.pmrg.org](http://www.pmrg.org).

**Worldwide Business Research** will hold a conference, themed "Next Generation Customer Experience," on **March 11-13** at the Rancho Bernardo Inn in **San Diego**. For more information visit [www.the-customer.com](http://www.the-customer.com).

**The Advertising Research Foundation** will hold its annual Re:think convention and insights zone on **March 17-20** at the **New York Marriott Marquis in Times Square**. For more information visit [www.thearf.org/rethink-2013.php](http://www.thearf.org/rethink-2013.php).

**Geoscape** will hold a conference, themed "New American Mainstream Business Summit," on **April 3-4** at the Conrad Hotel in **Miami**. For more information visit [www.cvent.com/d/kcqsrr](http://www.cvent.com/d/kcqsrr).

**ESOMAR** will hold its annual Asia-Pacific conference, themed "Asia on the Move," on **April 7-9** in **Ho Chi Minh City, Vietnam**. For more information visit [www.esomar.org/apac](http://www.esomar.org/apac).

**The Council of American Survey Research Organizations** will hold a management

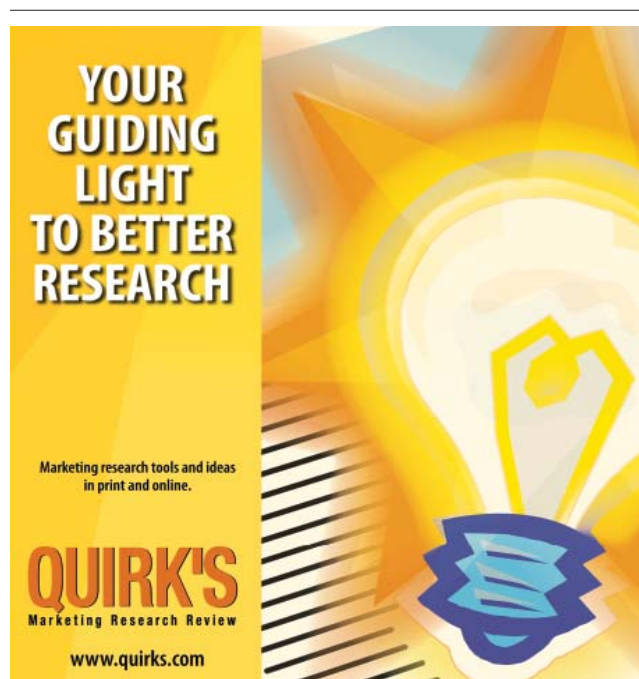
conference on **April 24-25** in **New Orleans**. For more information visit [www.casro.org](http://www.casro.org).

**IIR** will hold a conference focused on innovation and collaboration on **May 6-8** at the Seaport Boston Hotel and Adjacent World Trade Center in **Boston**. For more information visit [www.iirusa.com/feiusa/home.xml](http://www.iirusa.com/feiusa/home.xml).

**IIR** will hold a conference, themed "The Future of Consumer Intelligence," (formerly known as the IIR's Technology Driven Research Event) on **May 14-16** at the Wyndham Parc 55 in **San Francisco**. For more information visit [www.iirusa.com/technology/homepage.xml](http://www.iirusa.com/technology/homepage.xml).

**The Council of American Survey Research Organizations** will hold its annual technology conference on **May 29-30** in **New York**. For more information visit [www.casro.org](http://www.casro.org).

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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](mailto:emily@quirks.com). For a more complete list of upcoming events visit [www.quirks.com/events](http://www.quirks.com/events).



## CORRECTION

Due to an editing error in "Still waters run deep" on page 68 of the October issue, Figures 1 and 2 were not included in the article text. To access a corrected version, please visit [www.quirks.com/articles/2012/20121012.aspx](http://www.quirks.com/articles/2012/20121012.aspx).





**Save the date!**

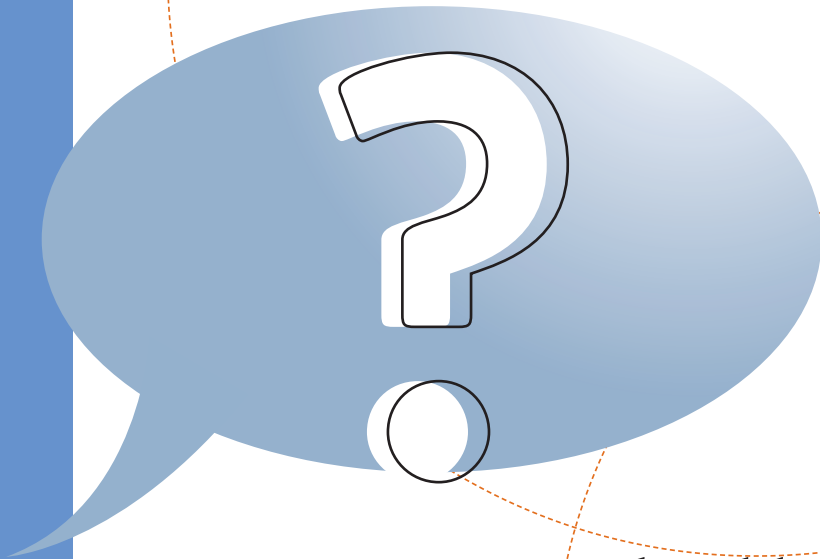
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## Questions you should ask when selecting a panel provider

### 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 re-

search survey invitations has been given by individuals on these lists. Actively-managed panels have been shown to produce higher response rates and data quality.

### 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.

### Quality control

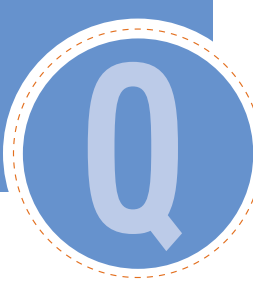
What guarantees are there to guard against bad data (i.e., respondent cheating or not concentrating)? Do you have an identity confirmation procedure? Do you have procedures to detect fraudulent respondents at the time of registration? To ensure the quality and reliability of the data, choose a panel 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.



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2012

# Research Panels Directory

Welcome to the annual directory of research panels. 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. 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 82, lists the name of the panel and company and the page number where the contact information can be found.



A searchable version of this directory is available on our Web site at [www.quirks.com](http://www.quirks.com)



**ACNielsen**

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Fresh Food Consumer Panel  
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Homescan  
Size: 126,000  
Homescan Panel Views Survey  
Size: 61,500  
Intended Users  
Size: 61,500

**Adelman Research Group - A SurveyService Company**

Buffalo, NY  
Ph. 800-507-7969 or 716-876-6450  
sadelman@surveyservice.com  
www.adelmanresearchgroup.com  
Susan Adelman, President  
Proprietary Panel Mgmt.: Yes

**Affordable Samples, Inc.**

Old Greenwich, CT  
Ph. 800-784-8016 or 203-637-8563  
sales@affordablesamples.com  
www.affordablesamples.com  
James Sotzing, President  
Panel Titles:  
Affordable Samples Online Business Panel  
Size: 1,500,000 Type: Online  
Affordable Samples Online Consumer Panel  
Size: 4,000,000 Type: Online

The other, better-value sampling company, founded in 1991, providing representative online consumer (4 million) and business (1.5 million) panel samples. Many predefined selectors and fast pre-screening for almost any low-incidence category. Sample-only service or sample plus programming/hosting/tabs. Fast fielding, responsive service and great prices. Sampling expertise and advice. Hundreds of smart research clients. (See advertisement on p. 69)

**AIP Corporation**

Tokyo Japan  
Ph. 81-3-5464-8052  
aip-sales@aip-global.com  
www.aip-global.com/EN/panels  
Nelson Davis  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
AIP China  
Type: Online  
AIP France  
Type: Online  
AIP German  
Type: Online  
AIP Hong Kong  
Type: Online  
AIP India  
Type: Online  
AIP Indonesia  
Type: Online  
AIP Japan  
Type: Online  
AIP Malaysia  
Type: Online  
AIP Singapore  
Type: Online  
AIP South Korea  
Type: Online  
AIP Taiwan  
Type: Online

AIP Thailand  
Type: Online  
AIP UK  
Type: Online  
AIP USA  
Type: Online  
AIP Vietnam  
Type: Online

AIP - the Tokyo-based provider of proprietary online panels - covers 12 Asian markets; Japan, China, Korea, Taiwan, Hong Kong, Singapore, Thailand, Malaysia, Indonesia, Vietnam, India and the Philippines. Our panels cover consumer, IT/DM, B2B, automotive, travelers, patients, physicians and more. We also build custom panels/communities, facilitate IHUTs and online FGs. Working with offline partners, we can execute hybrid, mixed data collection methodologies (qual/quant, on-/offline). Through our extensive international partnerships, we are able to offer one-stop-shop global coverage. (See advertisement on p. 45)

**all global**

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

**Amplitude Research, Inc.**

Boca Raton, FL  
Ph. 877-225-7950  
sales@amplituderresearch.net  
www.amplituderresearch.com  
Stephen S. Birnkrant, CEO  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Panelspeak Business and Consumer Panel  
Size: 100,000 Type: Online  
Panelspeak Technology Panel  
Size: 60,000 Type: Online

**Anderson Analytics, LLC**

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

**Ann Michaels and Associates Ltd.**

Naperville, IL  
Ph. 866-703-8238  
kdoering@annmichaelsltd.com  
www.annmichaelsltd.com  
Kathy Doering, President  
Type: Telephone, Online

Our proprietary, on demand panel of over 4.5 million worldwide consumers is optimized to leverage online & mobile technologies for the benefit of rapid collection of rich, behavioral insight & digital video footage. We work across 26 global offices and cover 61 countries throughout the world. We provide deep & actionable qualitative findings to corporate entities, communication agencies, & strategic brand consultants. (See advertisement on page 3)

**ARCS®**

Horsham, PA  
Ph. 800-336-7674 or 215-653-7100  
tantoniewicz@m-s-g.com  
www.m-s-g.com  
Tim Antoniewicz, VP Business Development  
Proprietary Panel Mgmt.: Yes

Since 1991, companies have used ARCS® technology to automate recruiting, scheduling and collection of data from proprietary panelists for central location and home-use tests, sensory evaluations and focus groups. Built on the .NET 3.5 Framework and SQL Server Platform, ARCS systems feature automatic updating of panelist information via Web or IVR and built-in sample selection, questionnaire development and query tools plus many standard reports. (See advertisement on p. 17)

**Authentic Response, Inc.**

New York, NY  
Ph. 1-888-AR-PANEL  
info@authenticresponse.com  
www.authenticresponse.com  
Jonathan Tice, VP, Sales & Marketing  
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 its Authentic Recruitment panelist sourcing technique; its patented double-opt-in permission standards; and its Authentic Validation technique, which ensures legitimate survey responses of the very highest quality. With industry-leading reach to consumers, business decision makers and many other heavily-profiled audiences, it's no wonder that hundreds of market research firms look to Authentic Response for their global online sample needs.

**AutoPacific, Inc.**

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

**B&N PanelWizard BV**

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

**Beta Research Corporation**

Syosset, NY  
Ph. 516-935-3800  
gdisimile@betaresearch.com  
www.betaresearch.com  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Beta Research Consumer Research Panel  
Size: 50,000 Type: Online



**Borderless Access Panels Pvt Ltd.**

Bangalore India  
 Ph. 91-80-49313800 or 866-614-8047 toll-free  
 rfp@borderlessaccess.com  
 www.borderlessaccess.com  
 Dushyant Gupta  
 Proprietary Panel Mgmt.: Yes  
 Panel Titles:  
 Borderless Access Panels - Argentina Consumer/B2B  
 Size: 60,000 Type: Online  
 Borderless Access Panels - Brazil - Consumer & B2B  
 Size: 150,000 Type: Online  
 Borderless Access Panels - China - Consumer & B2B  
 Size: 150,000 Type: Online  
 Borderless Access Panels - India - Consumer & B2B  
 Size: 350,000 Type: Online  
 Borderless Access Panels - Indonesia Consumer/B2B  
 Size: 60,000 Type: Online  
 Borderless Access Panels - Mexico - Consumer & B2B  
 Size: 150,000 Type: Online  
 Borderless Access Panels - Russia - Consumer & B2B  
 Size: 150,000 Type: Online  
 Borderless Access Panels - South Africa Consum/B2B  
 Size: 60,000 Type: Online  
 Borderless Access Panels - Taiwan- Consumer & B2B  
 Size: 30,000 Type: Online  
 Borderless Access Panels - Turkey - Consumer & B2B  
 Size: 30,000 Type: Online

Borderless Access is the emerging market online research specialist with over a decade of experience in building and maintaining panels across geographies and cultures. We have proprietary panels in 10 markets and constantly add new markets to our offering. Our global footprint and partnership lets us reach over 100 million consumers across 65 countries. We are the only online panel company within the emerging markets listed as a preferred vendor for several Honomichl research companies. Our panels are representative of a significant portion of the online population in each country. (See advertisement on p. 30)

**Borders, Inc.**

Tokyo Japan  
 Ph. 81-3-6380-0537  
 sales@borders.jp  
 www.borders.jp  
 Ikuo Hagino, CEO  
 Proprietary Panel Mgmt.: Yes  
 Panel Titles:  
 Borders Japan Panel  
 Size: 600,000 Type: Online

**BuzzBack Market Research**

New York, NY  
 Ph. 646-519-8010  
 info@buzzback.com  
 www.buzzback.com  
 Proprietary Panel Mgmt.: Yes  
 Panel Titles:  
 Buzz Back Panel  
 Size: 300,000 Type: Online



**RESEARCH**

**C+R Research Services, Inc.**

Chicago, IL  
 Ph. 312-828-9200  
 info@crresearch.com  
 http://crresearch.com  
 Robbin Jaklin, President  
 Proprietary Panel Mgmt.: Yes  
 Panel Titles:  
 KidzEyes.com  
 Size: 10,000 Type: Online  
 LatinoEyes.com  
 Size: 2,200 Type: Online  
 ParentSpeak  
 Size: 6,300 Type: Online  
 TeensEyes.com  
 Size: 11,500 Type: Online

At C+R Research - a consumer and market insights firm - we take a comprehensive approach to qualitative and quantitative research. We emphasize a combination of traditional and non-traditional methodologies to discover the essentials of brands and consumer behavior. Our specialized divisions - KidzEyes®, TeensEyes®, LatinoEyes®, BoomerEyes and ShopperEyes® - explore specific demographics while our online kid, teen, mom and Latino panels put clients in touch with targeted consumers. Additionally, our YouthBeat® subscription insight service offers a holistic view of today's youth and family.

**Campos Market Research, Inc.**

D/B/A Campos Inc  
 Pittsburgh, PA  
 Ph. 412-471-8484 x309  
 info@campos.com  
 www.campos.com  
 Kelli Best, Director, Field & Fulfillment  
 Proprietary Panel Mgmt.: Yes  
 Panel Titles:  
 VO!CE of the Region  
 Size: 10,000 Type: Telephone, Online

**Canadian Viewpoint, Inc.**

Richmond Hill, ON Canada  
 Ph. 905-770-1770 or 888-770-1770  
 jason@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

HIGH QUALITY, LOW COST

**The Other Sampling Company**

ONLINE PANEL AND PHONE SAMPLES

OR COMPLETE SURVEY FULFILLMENT

**Sample**

ONLINE & TELEPHONE CONSUMER & B2B STANDARD DEMOS TONS OF TARGETS MILLIONS OF PANELISTS U.S. AND GLOBAL

**Survey Programming**

YOUR QUESTIONNAIRE SIMPLE OR COMPLEX

**Data Collection**

SURVEY HOSTING QUOTA MANAGEMENT

**Tabs**

ON TIME ON BUDGET

REQUEST A QUOTE via our website, email or phone

**AFFORDABLE SAMPLES, INC.**

The OTHER Sampling Company

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

**CATALYSTMR**

Oakland, CA  
Ph. 800-819-3130  
info@catalystmr.com  
www.catalystmr.com

Adam Berman  
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. 203-315-3280  
info@touchstoneresearch.com  
http://childresearch.com  
Steve Burch, President  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Childresearch.com Panel  
Type: Online

**Cint USA Inc.**

Encino, CA  
Ph. 818-754-9576  
contact-US@cint.com  
www.cint.com  
Proprietary Panel Mgmt.: Yes

Cint empowers access to opinions by innovating the way market insight is gathered. Reach over 7.5 million people in 50 countries, all recruited through 500 different panel owners like publishers, local media outlets, market research agencies and non-profits. Cint's exchange platform, OpinionHUB, the fully-transparent insight marketplace, brings together questions and answers from all around the world. Cint is proud to be certified to ISO 20252 and continues to lead the industry in quality and reliability. Cint is headquartered in Stockholm, Sweden, and has offices in major cities across Europe, North America and Asia-Pacific.

**City Research Solutions**

Middleton, WI  
Ph. 608-826-7345  
mel@cityresearchsolutions.com  
www.cityresearchsolutions.com  
Melvin Pope, Principal  
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

**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  
Carlos Michelsen  
Panel Titles:  
Veterinarian nurses in the UK  
Size: 750 Type: Online  
Veterinary professionals in Belgium  
Size: 400 Type: Online  
Veterinary professionals in Denmark  
Size: 200 Type: Online  
Veterinary professionals in France  
Size: 3,000 Type: Online  
Veterinary professionals in Germany  
Size: 1,000 Type: Online  
Veterinary professionals in Italy  
Size: 1,000 Type: Online  
Veterinary professionals in Netherlands  
Size: 400 Type: Online  
Veterinary professionals in Spain  
Size: 1,000 Type: Online  
Veterinary professionals in Sweden  
Size: 300 Type: Online  
Veterinary professionals in Switzerland  
Size: 300 Type: Online  
Veterinary professionals in the UK  
Size: 3,000 Type: Online

**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  
info@crcresearch.com  
www.crcresearch.com  
Jessica Gibson  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
CRC Consumer and B2B  
Size: 90,000 Type: Online  
CRC Health  
Size: 125,000 Type: Online

**Customer Service Monitors**

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

**Datatelligence Online**

Ormond Beach, FL  
Ph. 386-677-5644  
sales@datatelligence.com  
www.datatelligence.com  
Jeffrey Fiesta  
Panel Titles:  
Datatelligence Online  
Size: 420,000 Type: Online  
Datatelligence Online Community Access Panel  
Size: 200,000 Type: Online  
Mobile Smart Phone Panel  
Size: 10,000 Type: Online

Datatelligence Online is an actively-managed, nationally-representative online community of over 400,000 members. Recruit is primarily based on face-to-face communication with addition of standard online recruitment. Unique to Datatelligence are high-return-rate I-HUT capabilities, live online chat interviewing, CAPs (community access panelists within 15 mile radius of our office locations across the U.S.) and full-service capabilities which include tabulations and programming/hosting. Datatelligence can also arrange for face-to-face and telephone interviews. All data is validated by the Confidata System.

**Decision Analyst, Inc.**

Arlington, TX  
Ph. 817-640-6166 or 800-262-5974  
jthomas@decisionanalyst.com  
www.decisionanalyst.com  
Jerry W. Thomas, President/CEO  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
American Consumer Opinion \*  
Size: 8,000,000 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

Precise and consistent data are fundamental to the validity and projectability of research results and analytic inferences. Decision Analyst's leading-edge research and analytics are made possible by the consistency and reliability of its proprietary online panels and systems. Decision Analyst's double-opt-in online panels are rigorously managed, fairly compensated and continuously refreshed. During the mid-'90s, Decision Analyst helped pioneer the development of online research technologies and continues as a world leader in online research methods. (See advertisement on p. 29)

**DoctorDirectory.com, Inc.**

Asheville, NC  
Ph. 828-255-0012 or 888-796-4491  
sales@doctordirectory.com  
www.contactdd.com  
Rick Johnsen, VP Sales and Marketing  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
DoctorDirectory Physician Panel  
Size: 700,000 Type: Mail, Online

**EasyInsites**

Surrey United Kingdom  
 Ph. 44-1483-549-418  
 Charles@easyinsites.com  
 www.easyinsites.com  
 Charles M. Pearson, Managing Director  
 Proprietary Panel Mgmt.: Yes  
 Panel Titles:  
 Bounty "Word of Mum" Panel (UK)  
 Size: 40,000 Type: Online  
 Premier Chefs (UK)  
 Size: 1,200 Type: Online  
 The Children's Mutual "Parent's Panel" (UK)  
 Size: 4,000 Type: Online  
 WHSmith Surveys (UK)  
 Size: 12,000 Type: Online  
 Your Opinions - Your Cash (UK, US, Canada)  
 Size: 1,000 Type: Online

**EcoUnit LLC**

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

**Embrain Co., Ltd.**

Gangnam-gu, Seoul South Korea  
 Ph. 82-2-3406-3851  
 globalbiz@embrain.com  
 www.embrain.com  
 James Moon, Senior Manager  
 Proprietary Panel Mgmt.: Yes  
 Panel Titles:  
 Embrain Panel  
 Size: 1,500,000 Type: Online

**EMI - Online Research Solutions**

Cincinnati, OH  
 Ph. 513-321-5344  
 sales@emi-ors.com  
 www.emi-ors.com  
 Jason Scott, SVP, Sales Manager  
 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



**Epocrates, Inc.**

Ewing, NJ  
 Ph. 650-227-1776  
 quickrecruit@epocrates.com  
 www.epocrates.com/quickrecruit  
 Jung Park, SVP, Market Research  
 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 is a leading physician platform for essential clinical content, practice tools and health industry engagement at the point of care. The Epocrates network consists of more than one million health care professionals who are invited to join the Epocrates Honors market research panel. Epocrates has one of the largest verified, opted-in physician panels in the nation, which is recognized for its honesty and representation. Market research clients benefit from the company's deep relationship with clinicians and its ability to generate fast, quality responses. Epocrates offers solutions for recruiting, phone scheduling and honoraria disbursement for qualitative market research. (See advertisement on p. 71)

**E-Poll Market Research**

Encino, CA  
 Ph. 877-MY-EPOLL or 818-995-4960  
 client@epoll.com  
 www.epollresearch.com  
 Michelle Waxman, SVP, Corporate Development  
 Proprietary Panel Mgmt.: Yes  
 Panel Titles:  
 E-Poll Consumer Panel  
 Size: 250,000 Type: Online

**e-research-global.com**

Honolulu, HI  
 Ph. 808-377-9746  
 drjohn@e-research-global.com  
 www.e-research-global.com  
 Thomas E. Johnson, Ph.D.  
 Panel Titles:  
 e-Research-Global.com Panel  
 Size: 170,000 Type: Online



**M3 GLOBAL RESEARCH**

Epocrates and M3 Global research have partnered to become one of the world's largest verified, opted-in physician panels in the world, which is recognized for its honesty and representation.

Let us help your comprehensive research needs by contacting us at:  
[marketresearchservices@epocrates.com](mailto:marketresearchservices@epocrates.com)

**Esearch.com, Inc.**

Palos Verdes Peninsula, 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, homeowners, pet owners, sports (and other) enthusiasts and much, much more.  
(See advertisement on p. 72)

**FGI Research**

Chapel Hill, NC  
Ph. 919-929-7759  
asmith@fgiresearch.com  
www.fgiresearch.com  
Heather Woodward  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
SmartPanel of Consumers  
Size: 850,000 Type: Online  
SmartPanel of Growing Families  
Size: 35,000 Type: Online

**Focus 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: 3,063,415 Type: Telephone, Online  
Focus World Consumers Nationwide Panel  
Size: 6,134,001 Type: Telephone, Online  
Focus World Ethnic Panel  
Size: 922,167 Type: Telephone, Online

**G.L.A. Intercultural Marketing and Communication**

Tokyo Japan  
Ph. 81-50-5534-3915  
inquiry@GlobalLinkAssociates.com  
www.GlobalLinkAssociates.com  
Shino Fukuyama, Managing Director  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
G.L.A. Japanese House Hold Photo Reporting Panel  
Type: Mail, Telephone, Online

**Gallup Panel**

Omaha, NE  
Ph. 402-938-6539  
Jerry\_krueger@gallup.com  
www.galluppanel.com  
Proprietary Panel Mgmt.: Yes  
Gallup Panel, The  
Size: 50,000 Type: Mail, Telephone, Online

**GENESYS Sampling Systems**

Horsham, PA  
Ph. 800-336-7674 or 215-653-7100  
alambert@m-s-g.com  
www.m-s-g.com  
Alan Lambert, Vice President  
Proprietary Panel Mgmt.: Yes

Quality research never relies on a one-size-fits-all approach. Recognizing the variation in quality and coverage of the Internet resources available, we've assembled a number of best-in-class approaches - whether it's household panels, youth panels, minorities or other targeting variables - and utilize our time-honored, multi-sourced approach to provide a solution tailored to your particular Internet project.  
(See advertisement on p. 17)

**GfK Consumer Experiences North America**

New York, NY  
Ph. 212-240-5300  
info@gfkamerica.com  
www.gfkamerica.com  
Richard Catrone  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Cada Cabeza  
Size: 14,000 Type: Online  
Consumer Access Panel  
Size: 1,700,000 Type: Online  
KnowledgePanel Latino  
Size: 9,500 Type: Online  
KnowledgePanel®  
Size: 55,000 Type: Online  
National Shopper Lab  
Size: 23,000,000 Type: Online  
Physicians Consulting Network (PCN®)  
Type: Online

GfK is one of the world's leading full-service market research companies, with more than 11,500 experts working to discover new insights into the way people live, think and shop, in over 100 countries, every day. Several of our country-specific panels track online Web behavior (opt-in) and also include mobile capabilities through GfK's leading-edge .dx capabilities. We offer

access to consumer, Hispanic, physician (over 925,000 AMA-licensed physicians and specialties) and loyalty card panels, as well as to several of the world's largest databases. We use these resources to deliver proven solutions developed from a 360-degree view of our clients' markets and tailored to the new realities of the digital age.

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

Bellevue, WA  
Ph. 866-5-ASK GMI or 206-315-9300  
info@gmi-mr.com  
www.gmi-mr.com  
Dan Fitzgerald, V.P., Americas  
Proprietary Panel Mgmt.: Yes

GMI empowers insights. From intelligent sampling to award-winning survey engagement software to sample management and custom reporting, GMI adds value at every stage of the research process. With millions of deeply profiled double opt-in panelists across 40 proprietary panels throughout the Americas, Europe, the Middle East, and Asia Pacific, and with real-time respondent sourcing and advanced sample balancing capabilities, GMI offers a wide range of respondent access in a single, trusted partner. Along with a full suite of data collection services, GMI delivers the industry's most complete and highest-quality online research. For more information, visit [www.gmi-mr.com](http://www.gmi-mr.com) and [www.gmi-mrblog.com](http://www.gmi-mrblog.com).  
(See advertisement on p. 51)

**Harris Interactive Inc.**

Corporate Headquarters  
New York, NY  
Ph. 877-919-4765 or 585-214-7412  
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

**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](http://www.esearch.com) [esearch@esearch.com](mailto:esearch@esearch.com) 310.265.4608



**Insight Counts**

Gallatin, TN  
 Ph. 615-590-6180  
 contact@insightcounts.com  
 www.insightcounts.com  
 Darla Hall  
 Proprietary Panel Mgmt.: Yes  
 Panel Titles:  
 Concept Development  
 Size: 10,000 Type: Online  
 Consumer Research  
 Size: 10,000 Type: Telephone, Online  
 Customer Satisfaction  
 Size: 10,000 Type: Telephone, Online  
 Employee Satisfaction  
 Type: Telephone, Online  
 Ethnographic Research  
 Size: 10,000 Type: Online  
 Focus Groups  
 Size: 10,000  
 Home Use Tests  
 Size: 10,000 Type: Telephone, Online  
 Product Testing Research  
 Type: Telephone, Online

**InsightExpress, LLC**

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

**InsightLab.hu Market Research Ltd.**

Budapest Hungary  
 Ph. 36-1-301-0362  
 info@insightlab.hu  
 www.insightlab.hu  
 Panel Titles:  
 InsightLab.hu  
 Size: 100,000 Type: Online

**IntelliQB2B**

State College, PA  
 Ph. 814-234-2344  
 infoB2B@intelliQResearch.com  
 www.intelliQResearch.com  
 Panel Titles:  
 Diagnostics Plus Healthcare Panels  
 Size: 7,000 Type: Telephone, Online

**Inter@ctive Market Research srl**

Naples Italy  
 Ph. 39-081-22-92-473  
 info@interactive-mr.com  
 www.interactive-mr.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  
 Tom Kojima  
 Proprietary Panel Mgmt.: Yes  
 Panel Titles:  
 Interface Asia Consumer  
 Size: 630,000 in Japan; 466,000 in China; 165,000 in Korea Type: Online  
 InterfaceAsia B2B / IT  
 Size: 180,000 in Japan; 70,000 in China; 97,000 in Korea Type: Online  
 InterfaceAsia Medical (Patients)  
 Size: 50,000 in Japan; 34,000 in Korea; 34,000 in China Type: Online  
 InterfaceAsia Medical (Physician)  
 Size: 142,000 in Japan; 80,000 in China; 15,000 in Korea Type: Online

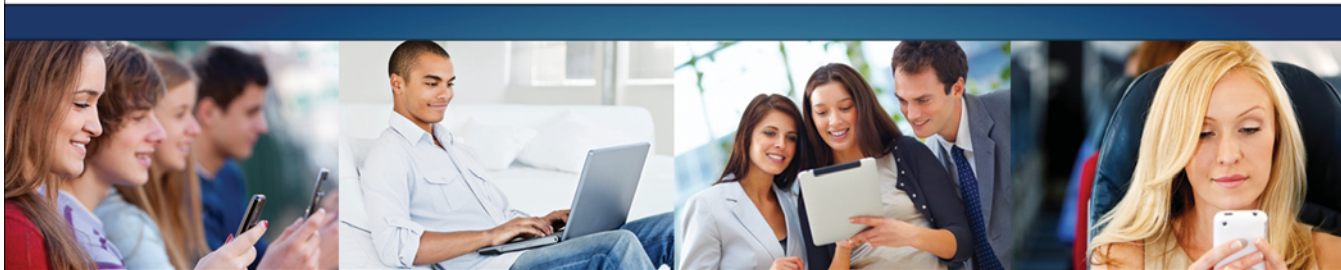
**IPANELASIA**

Bangalore India  
 Ph. 91-9923-780-878  
 info@ipanelasia.com  
 www.ipanelasia.com  
 Panel Titles:  
 B2B Online Panels  
 Type: Online  
 Healthcare Online Panels  
 Size: 402,858 Type: Online  
 Mobile Users Online Panel  
 Type: Online  
 Online Consumer Panel  
 Type: Online  
 Patients Online Panels  
 Type: Online

**Ipsos**  
 Chicago, IL  
 Ph. 312-665-0600  
 info@ipsos-na.com  
 www.ipsos-na.com  
 Elen Alexov  
 Proprietary Panel Mgmt.: Yes  
 Panel Titles:  
 Automotive Panel  
 Size: 400,000+ Type: Mail, Telephone, Online  
 Financial Panel  
 Size: 200,000+ Type: Mail, Telephone, Online  
 Global Opinion Panels - Asia Pacific  
 Size: 78,000+ Type: Mail, Telephone, Online  
 Global Opinion Panels - Western Europe  
 Size: 250,000+ Type: Mail, Telephone, Online  
 Global Opinion Panels-North America  
 Size: 1,800,000+ Type: Mail, Telephone, Online  
 Health Conditions Panel  
 Size: 250,000+ Type: Mail, Telephone, Online  
 Technology Panel  
 Size: 250,000+ Type: Mail, Telephone, Online  
 Travel & Leisure Panel  
 Size: 250,000+ Type: Mail, Telephone, Online  
 Voice of the Hispanic Family  
 Size: 11,000+ Type: Mail, Telephone,



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www.kinesisurvey.com

sales@kinesisurvey.com

**Ipsos Australia (West Perth)**

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

**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  
Alan Mavretish, VP, Client Development  
Panel Titles:  
Itracks Canada Talk Now  
Type: Online  
Itracks USA Talk Now  
Type: Online

**Kinesis Survey Technologies, LLC**

Austin, TX  
Ph. 512-590-8300  
sales@kinesisurvey.com  
www.kinesisurvey.com  
Proprietary Panel Mgmt.: Yes

Kinesis Panel™ is a robust panel management solution. It supports desktop and mobile panels of all sizes, and can be executed in multimode just like Kinesis Survey™. From importing and organizing panelist data, to continuous, ongoing project launches and behind-the-scenes incentive tracking, Kinesis Panel™ maximizes panel performance by enhancing the quality and reliability of your panel data. It is ideally suited for public panels with millions of panelists as well as small enterprise-based and customer-based market research online communities (MROCs).  
(See advertisement on p. 73)

**KL Communications, Inc.**

Red Bank, NJ  
Ph. 732-224-9991  
klc@klcommunications.com  
www.klcommunications.com  
Kevin Lonnie, President  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Consumer Directions  
Size: 15,000 Type: Online

**Lightspeed Research**

Warren, NJ  
Ph. 908-605-4500  
info@lightspeedresearch.com  
www.lightspeedresearch.com  
Bonnie Breslauer, EVP, Client Relations  
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.

**Luth Research**

San Diego, CA  
Ph. 800-465-5884 or 619-234-5884  
marketing@luthresearch.com  
www.luthresearch.com  
Janeen Hazel  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
SurveySavvy  
Size: 3,000,000+ Type: Online

Since 1977, Luth Research has been offering clients around the globe the kind of forward-thinking intelligence that moves their businesses ahead. From its innovative online community SurveySavvy™ to a creative combination of research methods by an experienced team, clients count on Luth Research for excellence in market research.

**M3 GLOBAL RESEARCH**

A division of M3 Inc. a SONY Group Company

**M3Global Research**

Washington, DC  
Ph. 202-293-2288  
Research@usa.m3.com  
http://research.m3.com  
Panel Titles:  
MDLinx Online Physician Community China  
Size: 559,556 Type: Online  
MDLinx Online Physician Community Europe Plus  
Size: 265,225 Type: Online  
MDLinx Online Physician Community Japan  
Size: 267,869 Type: Online  
MDLinx Online Physician Community Korea  
Size: 58,444 Type: Online  
MDLinx Online Physician Community USA  
Size: 127,338 Type: Online

M3 Global Research, the market research division of Tokyo-based M3 Inc., operates globally with a proprietary health care professional panel of 1.3 million respondents. The combined worldwide panels of MDLinx in the U.S., EMS Research in Europe and M3 companies across Asia, allow M3 Global Research to provide the largest verified panel of physicians and health care professionals in the world. M3 Global Research has offices in the U.S., U.K., Germany, Japan, Korea and China offering quantitative, qualitative and omnibus surveys, utilizing its online physician panels, call centers, fieldwork studios and in-country project managers. Visit <http://research.m3.com> or e-mail requests to [research@usa.m3.com](mailto:research@usa.m3.com).  
(See advertisement on p. 71)

**Macromill China, Inc.**

Shanghai China  
Ph. 86-21-6355-0303  
sales@cn.macromill.com  
http://cn.macromill.com/minglu  
Tetsuya Shinoda, General Manager  
Panel Titles:  
China Panel  
Size: 5,288,200 Type: Online

**Macromill, Inc.**

Tokyo Japan  
Ph. 81-3-6716-0740  
info\_en@macromill.com  
www.macromill.com/global  
Panel Titles:  
Macromill China Panel  
Size: 5,288,200 Type: Online  
Macromill Japan Panel  
Size: 1,071,511 Type: Online  
Macromill South Korea Panel  
Size: 270,938 Type: Online

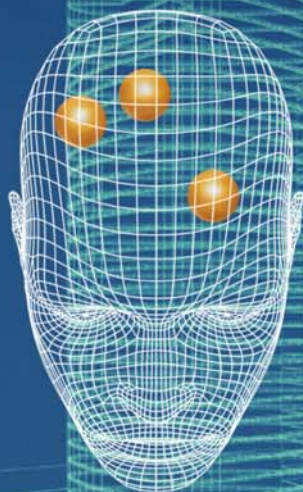
**Market Decisions Corporation**

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  
MoonEagle Arndt, Owner  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Market Reader Pro™ Consumers (worldwide)  
Size: 160,000 Type: Online

# The Premier Online Consumer Panel



**MindField**  
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[mindfieldonline.com/client](http://mindfieldonline.com/client)  
[jmace@mcmillionresearch.com](mailto:jmace@mcmillionresearch.com)  
800-969-9235



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### Marketing Systems Group

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

Through its ARCS® Systems division, Marketing Systems Group provides technology to automate recruiting, scheduling and collection of data via Web or IVR from proprietary panelists for sensory evaluations, focus groups and central location tests. MSG's GENESYS Sampling Systems division has assembled a number of best-in-class approaches for various targeting variables, providing a multi-sourced approach tailored to particular projects. (See advertisement on p. 17)

### MarketVibes, Inc.

Kokomo, IN  
Ph. 765-459-9440  
lisa@market-vibes.com  
www.market-vibes.com  
Lisa Pflueger, President  
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  
Tyler McMullen, President  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Viewpoint Forum  
Type: Online

### Mars Research

Ft. Lauderdale, FL  
Ph. 954-771-7725 or 877-755-2805  
joyceg@marsresearch.com  
www.marsresearch.com  
Joyce Gutfreund, Executive Vice President  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Market Research Online Community  
Size: 100,000 Type: Online  
Mars General Consumer Panel  
Size: 250,000 Type: Online



### Matrix Research

Thornhill, ON Canada  
Ph. 905-707-1300 or 647-990-5401  
survey@matrixresearch.ca  
www.matrixresearch.ca  
Anton Nicolaidis, VP, Sales/Client Services  
Panel Titles:  
Ethnic Voice Accord (EVA)  
Size: 20,000 Type: Online

EVA (Ethnic Voice Accord) is the leading panel in Canada that reaches "New Canadians," predominantly of Chinese, South and Southeast Asian heritage. Most members are in Ontario and B.C., due to the high concentration of newcomers in these provinces. Member records contain a number of variables which can be used for sample targeting, such as ethnicity, tenure in Canada, mother tongue, preferred language, age groups in household and others. We can provide sample only or a turnkey solution that includes programming and hosting, translations, coding and tabs/data analysis.

### 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: 969,000 Type: Telephone, Online



### Mindfield Online Internet Panels

(A McMillion Company)  
Charleston, WV  
Ph. 304-343-9650  
jmace@mcmillionresearch.com  
www.mindfieldonline.com  
Jay Mace, Vice President  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Mindfield Electronics and Gaming Panel  
Type: Online  
Mindfield General Consumer Panel  
Type: Online  
Mindfield Health Ailment & Condition  
Type: Online  
Mindfield Health and Beauty Aids 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 pp. 49, 75)

### 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  
Brin Moore, VP Market Research  
Panel Titles:  
MyPoints Automotive Panel  
Type: Online  
MyPoints B2B/IT Panel  
Type: Online  
MyPoints Consumer Panel  
Type: Online

### Netetude UK Ltd.

London United Kingdom  
Ph. 44-207-687-1234  
contact@netetude.co.uk  
www.netetude.co.uk  
Eric Brandenburg  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
French Panel  
Size: 400,000 Type: Online  
German Panel  
Size: 75,000 Type: Online  
UK Panel  
Size: 100,000 Type: Online

### NovaTest

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



### Olson Research Group, Inc.

Healthcare Marketing Research  
Quality Data Collection | Recruitment | Analysis

### Olson Research Group, Inc.

Yardley, PA  
Ph. 267-487-5500  
info@olsonresearchgroup.com  
www.olsonresearchgroup.com  
Paul Allen  
Proprietary Panel Mgmt.: Yes

Choose Olson Research Group Inc. for full-service quantitative or qualitative research, online research or data collection. Specializing in pharmaceutical and health care research, we handle all steps from study design to analysis and interpretation of results. Our online research capabilities incorporate the latest technological advances, including online conjoint analysis. All research is conducted by professional researchers, highly-trained moderators and experts in the appropriate discipline. (See advertisement on p. 54)



### OMI Online Market Intelligence

Moscow Russia  
Ph. 7-495-660-94-15  
rpf@omirussia.ru  
www.omirussia.ru/en/  
Dr. Alexander Shashkin, CEO  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
B2B IT Panel Russia  
Size: 17,000 Type: Online  
B2C Automotive Panel Russia  
Size: 104,727 Type: Online  
B2C Panel Baltic States (Lithuania, Latvia, Estonia)  
Size: 10,176 Type: Online  
B2C Panel Belarus  
Size: 36,223 Type: Online  
B2C Panel Kazakhstan  
Size: 16,991 Type: Online  
B2C Panel Russia  
Size: 456,118 Type: Online  
B2C Panel Ukraine  
Size: 1,129,475 Type: Online  
Patient Panel Russia  
Size: 162,039 Type: Online  
Physician Panel Russia  
Size: 84,412 Type: Online

OMI is a leading Russian online panel provider for marketing research. With OMI online panels you can access over 600,000 consumers, 105,000 vehicle

owners, 17,000 IT professionals and 82,000 physicians recruited from a wide variety of local Web-portals. Our panels are in full compliance with ESOMAR and CASRO standards. OMI is the only research company in Russia that holds the Gold Certificate for quality and consistency awarded by Mktg Inc. We provide questionnaire translation, survey programming, coding and cross-tabulation and recruiting proprietary panels in Russia and CIS countries.  
(See advertisement on p. 77)

**OnCampus Research**

Oberlin, OH  
Ph. 440-775-7777 or 800-622-7498  
info@oncampusresearch.org  
www.oncampusresearch.com  
Julie Traylor, Chief of Planning and Research  
Panel Titles:  
OnCampus Research Student Panel  
Size: 18,000 Type: Online

**Opinion Search Inc.**

Ottawa, ON Canada  
Ph. 800-363-4229 or 613-230-9109  
info@opinionsearch.com  
www.opinionsearch.com  
Rahil Dattu, V.P., Client Services  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Opinion Search Consumer Panel  
Type: Online

**Osterman Research, Inc.**

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

**Outsource Research Consulting**

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



**Panel Direct**

Wayne, PA  
Ph. 215-367-4100  
kharrison@paneldirectonline.com  
www.paneldirectonline.com  
Kim Harrison, CEO  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Panel Direct Online Panel  
Size: 400,000 Type: Online

Panel Direct 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.

**Panelteam B.V. Headquarters**

Hertogenbosch Netherlands  
Ph. 31-85-2017437  
p.laumans@panelteam.com  
www.panelteam.com  
Panel Titles:  
Belgium

Size: 125,000 Type: Online  
Denmark  
Size: 50,171 Type: Online  
Finland  
Size: 42,861 Type: Online  
France  
Size: 134,351 Type: Online  
Germany  
Size: 256,062 Type: Online  
Italy  
Size: 141,667 Type: Online  
Netherlands  
Size: 137,201 Type: Online  
Norway  
Size: 33,886 Type: Online  
Poland  
Size: 36,889 Type: Online  
Russia  
Size: 32,041 Type: Online  
Spain  
Size: 85,000 Type: Online  
Sweden  
Size: 30,132 Type: Online  
United Kingdom  
Size: 207,753 Type: Online

**The People Panel**

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

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IN RUSSIA, UKRAINE, KAZAKHSTAN,  
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PANEL SIZE

Consumers:  
**500k+**

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**120k+**

B2B IT:  
**15k+**

Patients:  
**200k+**

Physicians:  
**50k+**



www.omirussia.ru/en

rfp@omirussia.ru



**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

**Precision Research Inc.**

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

**Profile Marketing Research, Inc.**

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

**Public Opinions Inc.**

Ottawa, ON Canada  
Ph. 613-595-1234  
info@publicopinions.com  
www.publicopinions.biz  
Melanie Clement, Ph.D.  
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  
global@pulse-group.com  
www.pulse-group.com  
Bob Chua, CEO  
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  
Mark Dulle  
Proprietary Panel Mgmt.: Yes

**QuestBack Group, Inc.**

Bridgeport, CT  
Ph. 203-690-1052  
info.us@questback.com  
www.questback.com  
Proprietary Panel Mgmt.: Yes

Our Online Community software turns the Internet into a stage for exploratory market research. Participants swap notes in moderated forums, chats and blogs on brand and product issues and furnish ideas and expertise while giving valuable insights into their thoughts, feelings and motivations. With Online Community, market researchers can combine all available tools and methods in any way they wish. Online Community not only provides a large number of opportunities to collect data, it also delivers the appropriate analysis suite for extracting information and insights from this data.  
(See advertisement on p. 47)

**Radius Global Market Research**

New York, NY  
Ph. 212-633-1100  
clister@radius-global.com  
www.radius-global.com  
Chip Lister  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Know More™ Internet Panel  
Size: 6,000,000 Type: Online

**Reckner Healthcare**

Montgomeryville, PA  
Ph. 215-822-6220  
sphilippe@reckner.com  
www.reckner.com  
Susan Phillippe  
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 responsive 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.

**REReZ**

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

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

**Research For Good Inc.**

Seattle, WA  
Ph. 425-610-7294  
sayhi@researchforgood.com  
www.researchforgood.com  
Panel Titles:  
SaySo for Good - Canada  
Type: Online  
SaySo for Good - US  
Type: Online

**Research Now**

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

Research Now is the leading global digital data collection provider. We enable you to access millions of quality respondents around the world, with over 6.8 million active panelists and thousands of fresh survey respondents sourced from the web on any given day. We are proud to offer you the largest, most powerful research panels available today - the Valued Opinions™ Panel and the industry's first and best by invitation-only panel, the e-Rewards® Opinion Panel. Access the minds of consumers, business professionals and hard-to-reach audiences with our full set of services. To find out more or begin a conversation with us, visit [www.researchnow.com](http://www.researchnow.com). (See wrap)

**Research Panel Asia**

Century City, CA  
Ph. 310-270-9470  
contact@researchpanelasia.com  
www.researchpanelasia.com  
Panel Titles:  
91wenwen.com - China Panel  
Size: 270,000 Type: Online  
Panelnow.co.kr - South Korea Panel  
Size: 110,000 Type: Online  
Research Panel - Japan Panel  
Size: 540,000 Type: Online

Research Panel Asia is a specialist in the online research field of the Asia-Pacific region, now the one and only one provider that holds pure proprietary panels in the regional main three countries (Japan, China, South Korea). With various updated profile attributes covered in the B2C, B2B, health care area, we are experienced in not only ad hoc studies but tracking projects, qualitative recruitment, IHUT recruitment and other method as well. Focusing in the true quality of our sample specialty services throughout the region and with our 24-hour coverage for quotation supports, we assure the fulfilling of your needs in Asian online research.

**Research Results, Inc.**

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

**ResearchCenter Ltd.**

Budapest Hungary  
Ph. 36-1-373-0936  
request@researchcenter.hu  
www.researchcenter.hu  
Andras Huller, Business Development Manager  
Proprietary Panel Mgmt.: Yes  
Panel Titles:

ResearchCenter Consumer Panel Hungary  
Size: 170,000 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

#### RestaurantInsights.com

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

#### RNB Research

RNB House  
Noida (U.P.) India  
Ph. 91-11-2546-1415  
info@rnbresearch.com  
www.rnbresearch.com  
James Gomes, Project Manager  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
RNB Small Business Panel  
Size: 29,734 Type: Online  
RNB Africa Consumer & B2B  
Size: 68,365 Type: Online  
RNB Asia Pacific Consumer & B2B  
Size: 1,135,434 Type: Online  
RNB Consumer Ailment Panel  
Size: 9,368 Type: Online  
RNB Europe Consumer & B2B  
Size: 203,859 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 Middle East Consumer & B2B  
Size: 245,702 Type: Online  
RNB North America Consumer & B2B  
Size: 87,188 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 South America Consumer & B2B  
Size: 112,185 Type: Online  
RNB Youth Panel  
Size: 57,682 Type: Online

#### RONIN Corporation

London United Kingdom  
Ph. 44-20-7091-1400  
info@ronin.com  
www.ronin.com/dc  
Anton Richter, Bus. Dev. Manager  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
RONIN 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. 323-325-9462  
info@sampleczar.com  
www.sampleczar.com  
Douglas Lowell, President  
Panel Titles:  
Sample Czar Business  
Type: Online  
Sample Czar Consumer  
Type: Online  
Sample Czar Hispanic  
Type: Online  
Sample Czar Patients / Find A Cure Panel  
Type: Online



#### The Sample Network

Cherry Hill, NJ  
Ph. 888-572-3255  
quotes@thesamplenetwork.com  
www.thesamplenetwork.com  
Tami Brewer  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
TSN B2B Panel  
Type: Online  
TSN Consumer Panel  
Type: Online  
TSN Ethnic Panel  
Type: Online  
TSN Healthcare Panel  
Type: Online  
TSN Teen Panel  
Type: Online

The Sample Network (TSN) focuses on a blended sample methodology utilizing multiple sources. This helps to eliminate any bias inherent in utilizing only one panel. TSN provides online sample for quantitative studies and turnkey recruiting solutions for qualitative studies. We also offer programming, hosting and translation, as well as many other services to simplify the research process for our clients. One of our long-term clients says it best – “The Sample Network provides quality market research panelists at compelling prices. TSN’s commitment to service is unparalleled.”

#### Shifrin-Hayworth

Southfield, MI  
Ph. 248-223-0020 or 800-559-5954  
research@shifrin-hayworth.com  
www.shifrin-hayworth.com  
Mark Shifrin, President  
Proprietary Panel Mgmt.: Yes  
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  
Joanna Zanopoulo, President  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Custom/Proprietary Panels and Community Panels

#### Specpan

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



Science. People. Innovation

#### SSI

Shelton, CT  
Ph. 203-567-7200  
info@surveysampling.com  
www.surveysampling.com/  
Max Zietz, VP Sales  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Asiktstorget (Sweden)  
Type: Online  
Cafe d'Opinion (Canada)  
Type: Online  
Centro de Opinion (Spain)  
Type: Online  
Centro di Opinione (Italy)  
Type: Online  
Choozz (Belgium)  
Type: Online  
Choozz (Denmark)  
Type: Online  
Choozz (France)  
Type: Online  
Choozz (Germany)  
Type: Online  
Choozz (Italy)  
Type: Online  
Choozz (Netherlands)  
Type: Online  
Choozz (Norway)  
Type: Online  
Choozz (Spain)  
Type: Online  
Choozz (Sweden)  
Type: Online  
Choozz (United Kingdom)  
Type: Online  
Choozz (United States of America)  
Type: Online  
MeinungsOrt (Germany)  
Type: Online  
Meinungswelt (Austria)  
Type: Online  
Meinungswelt (Germany)  
Type: Online  
Meinungswelt (Switzerland)  
Type: Online  
Meningstorget (Norway)  
Type: Online  
Mielipidemaailma (Finland)  
Type: Online  
Mirmnenij (Russia)  
Type: Online  
mitpanel.dk (Denmark)  
Type: Online  
Mon Opinion Compte (France)  
Type: Online  
Mondodiopinione (Italy)  
Type: Online  
Mondodiopinione (Switzerland)  
Type: Online  
Mundodeopinioes (Brazil)  
Type: Online  
Mundodeopinioes (Portugal)  
Type: Online  
Opinieland (Belgium)  
Type: Online  
Opinieland (Netherlands)  
Type: Online  
Opiniolandia (Argentina)  
Type: Online  
Opiniolandia (Mexico)  
Type: Online

Opiniolandia (Spain)  
Type: Online

Opinion Outpost (Canada)  
Type: Online

Opinion Outpost (United Kingdom)  
Type: Online

Opinion Outpost (United States of America)  
Type: Online

Opinionsland (Denmark)  
Type: Online

OpinionWorld (Australia)  
Type: Online

OpinionWorld (Canada)  
Type: Online

OpinionWorld (China)  
Type: Online

OpinionWorld (Hong Kong)  
Type: Online

OpinionWorld (India)  
Type: Online

OpinionWorld (Ireland)  
Type: Online

OpinionWorld (Japan)  
Type: Online

OpinionWorld (Korea, South)  
Type: Online

OpinionWorld (New Zealand)  
Type: Online

OpinionWorld (Singapore)  
Type: Online

OpinionWorld (Taiwan)  
Type: Online

OpinionWorld (United Kingdom)  
Type: Online

OpinionWorld (United States of America)  
Type: Online

OpinionWorld Business (United Kingdom)  
Type: Online

OpinionWorld Business (United States of America)  
Type: Online

Placedesopinions (Belgium)  
Type: Online

PlacedesOpinions (Canada)  
Type: Online

Placedesopinions (France)  
Type: Online

Placedesopinions (Switzerland)  
Type: Online

SurveySpot (Canada)  
Type: Online

SurveySpot (United States of America)  
Type: Online

Swiatopinii (Poland)  
Type: Online

SSI is the world's leading provider of sampling, data collection and data analytic solutions for survey research. SSI reaches respondents across 72 nations through online, landline phone, mobile/wireless and mixed access. With 27 offices spanning every time zone and staff fluent in 36 languages, SSI offers the widest, most diverse access to consumer and business audiences around the globe. The SSI Dynamix™ sampling platform links SSI's own panels to social media, online communities, affiliate partners and more. The resulting SSI online sample blend has been recognized for outstanding consistency by Mktg Inc.'s Consistent Track™ audit. (See advertisement on p. 59)

#### 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



#### SurveyHealthCare

New York, NY  
Ph. 212-290-7642  
Jerry.Arbittier@surveyhealthcare.com  
www.surveyhealthcare.com  
Jerry Arbittier, President  
Panel Titles:  
Global Healthcare Panel  
Size: 2,000,000 Type: Online

SurveyHealthCare (SHC) specializes in interviewing physicians, nurses, pharmacists, payers, hospital professionals, dentists and veterinarians with over 2 million health care professionals and 500,000 sufferers. SHC supplements e-mail panel recruitment with our in-house 500+ CATI stations. Our "Panel Plus" sampling technique provides the efficiency of a panel company with the quality of a traditional sampling company to reach more physicians and match a higher percent of a client's list. Other services - programming, coding, crosstabs and online pretests.

#### SurveyService - Division of Adelman Research Group

Buffalo, NY  
Ph. 800-507-7969 or 716-876-6450  
sadelman@surveyservice.com  
www.surveyservice.com  
Susan Adelman, President  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
SurveyService Opinion Panel  
Size: 50,000 Type: Telephone, Online

#### Team Vier b.v.

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



#### Think Virtual Fieldwork

Palm Beach, FL  
Ph. 212-699-1901  
ray@thinkvirtualfieldwork.com  
www.thinkvirtualfieldwork.com  
Raymond Benack, President  
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. 7-495-661-3233  
ask@tiburon-research.ru  
www.tiburon-research.ru  
Artem Tinchurin, CEO  
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

#### TNS APAC International Research Centre

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



#### Toluna

Wilton, CT  
Ph. 203-834-8585 or 866-296-3049  
Toluna@toluna.com  
http://us.toluna-group.com/  
Michael Anderson, NA Head of Sales  
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

With 17 offices in Europe, North America and Asia-Pacific, Toluna is one of the world's leading online panel and survey-technology providers. Toluna provides a comprehensive proven, scalable solution that enables companies to answer questions of their target audience quickly and efficiently. Recently the company launched SmartSelect™ which is a respondent-level methodology designed to ensure more representative, reliable market research data. Toluna also provides the industry's leading technology suite, including PanelPortal™, AutomateSurvey™ and TolunaQuick™.  
(See advertisement on p. 19)

**TouchstoneResearch.com**  
Branford, CT  
Ph. 203-315-3280  
info@touchstoneresearch.com  
www.TouchstoneResearch.com  
Proprietary Panel Mgmt.: Yes

**TripleScoop Premium Market Intelligence**  
Castle Rock, CO  
Ph. 303-325-6705  
info@thetriplescoop.com  
http://thetriplescoop.com  
Ted Kendall  
Proprietary Panel Mgmt.: Yes

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



**uSamp™**  
Encino, CA  
Ph. 888-618-0292  
sales@usamp.com  
www.usamp.com  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
uSamp™  
Size: 9,000,000 Type: Online

uSamp (www.uSamp.com) is a premier provider of technology and survey respondents used to obtain consumer and business insights. uSamp's solutions and SaaS platform transform the way companies gain intelligence to make better, faster decisions about their products and services by tapping into uSamp's 9 million global panel of survey respondents. 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

technologies includes SampleMarket™, Instant.ly™, PanelBuilder™, PanelShield™, uSamp River Sample™ and real-time Panel Search. uSamp is based in Los Angeles, with five offices throughout the United States, Europe and India.  
(See advertisement on p. 7)

**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 x7101 or 888-710-7278  
mvernon@vernonresearch.com  
www.vernonresearch.com  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Vernon Research Opinion Panel  
Size: 4,500 Type: Online

**Video Chat Network**  
Scarsdale, NY  
Ph. 914-722-8385  
rgeltman@videochatnetwork.net  
http://videochatnetwork.net/index.php  
Proprietary Panel Mgmt.: Yes  
Panel Titles:  
Digitally Savvy Panel  
Size: 7,000 Type: Online

**Vision Critical**  
Vancouver, BC Canada  
Ph. 604-647-1980  
info@visioncritical.com  
www.visioncritical.com  
Proprietary Panel Mgmt.: Yes

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



**WorldOne**  
New York, NY  
Ph. 212-358 0800  
info@worldone.com  
www.worldone.com  
Matt Campion, President US/Global Accts  
Panel Titles:  
WorldOne's Global Dentist Panel  
Size: 38,154 Type: Online  
WorldOne's Global Eye Care Panel  
Size: 17,474 Type: Online  
WorldOne's Global Nurse Panel  
Size: 61,537 Type: Online  
WorldOne's Global Pharmacists Panel  
Size: 49,448 Type: Online  
WorldOne's Global Physician Panel  
Size: 554,952 Type: Online  
WorldOne's Global Veterinarian Panel  
Size: 29,196 Type: Online

WorldOne is the leading global health care insights and intelligence company, offering clients in over 80 countries online and offline access to health care professionals. WorldOne supports the full range of quant and qual market research services and provides accurate, timely and cost-efficient data collection with access to millions of health professionals. WorldOne has an exemplary approach to recruiting panelists and utilizes telephone verification to achieve the highest quality and largest global panel in the health care industry.



**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.

**YouGov Zapera**  
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 (Monday 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

**YouGovPolimatrix**  
Palo Alto, CA  
Ph. 650-462-8000  
elizabeth.christie@yougov.com  
www.polimatrix.com  
Elizabeth Christie, Director of Client Services  
Panel Titles:  
YouGov PollingPoint  
Size: 1,500,000 Type: Online

## African-American

**Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 68**  
 African-American Consumer, The, ACNielsen p. 68  
 ClickIQ Consumer Panel, ClickIQ p. 70  
 Concept Development, Insight Counts p. 73  
 Consumer Directions, KL Communications, Inc. p. 74  
 Consumer Research, Insight Counts p. 73  
 CRS Consumer ePanel, City Research Solutions p. 70  
 Custom/Proprietary Panels and Community Panels, Signet Research, Inc. p. 79  
 Customer Satisfaction, Insight Counts p. 73  
 E-Poll Consumer Panel, E-Poll Market Research p. 71  
**e-Rewards Opinion Panel, Research Now p. 78**  
**Esearch Children/Teens Panel, Esearch.com, Inc. p. 72**  
**Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 72**  
 Ethnographic Research, Insight Counts p. 73  
 Focus Groups, Insight Counts p. 73  
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 72  
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 72  
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 Harris Poll Online, Harris Interactive Inc. p. 72  
 Home Use Tests, Insight Counts p. 73  
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 Mars General Consumer Panel, Mars Research p. 76  
**Mindfield General Consumer Panel, Mindfield Online Internet Panels p. 76**  
**Mindfield Health Ailment & Condition, Mindfield Online Internet Panels p. 76**  
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 People Panel - Consumer Panel, The, The People Panel p. 77  
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 ReRez Consumer Panel, ReRez p. 78  
 SurveySavvy, Luth Research p. 74  
**SurveySpot (United States of America), SSI p. 79**  
 Synovate Automotive Panel, Ipsos p. 73  
 Synovate Financial Panel, Ipsos p. 73  
 Synovate Global Opinion Panels-North America, Ipsos p. 73  
 Synovate Health Conditions Panel, Ipsos p. 73  
 Synovate Technology Panel, Ipsos p. 73  
 Synovate Travel & Leisure Panel, Ipsos p. 73  
 TSN Ethnic Panel, The Sample Network p. 79  
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## Asians

**Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 68**  
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 Borders Japan Panel, Borders, Inc. p. 69  
 ClickIQ Consumer Panel, ClickIQ p. 70  
 Concept Development, Insight Counts p. 73  
 Consumer Directions, KL Communications, Inc. p. 74  
 Consumer Research, Insight Counts p. 73  
 CRC Consumer and B2B, CRC Research p. 70  
 Custom/Proprietary Panels and Community Panels, Signet Research, Inc. p. 79  
 Customer Satisfaction, Insight Counts p. 73  
 Embrain Panel, Embrain Co., Ltd. p. 71  
 E-Poll Consumer Panel, E-Poll Market Research p. 71  
**e-Rewards Opinion Panel, Research Now p. 78**  
**Esearch Children/Teens Panel, Esearch.com, Inc. p. 72**  
**Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 72**  
 Ethnic Voice Accord (EVA), Matrix Research p. 76  
 Ethnographic Research, Insight Counts p. 73  
 Focus Groups, Insight Counts p. 73  
 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 72  
 Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 72  
 G.L.A. Japanese House Hold Photo Reporting Panel, G.L.A. Intercultural Marketing and Communication p. 72  
 Harris Poll Online, Harris Interactive Inc. p. 72  
 Home Use Tests, Insight Counts p. 73  
 Interface Asia Consumer, InterfaceAsia p. 73  
 InterfaceAsia B2B / IT, InterfaceAsia p. 73  
 InterfaceAsia Medical (Physician), InterfaceAsia p. 73  
 Itracks Canada Talk Now, ittracks p. 74

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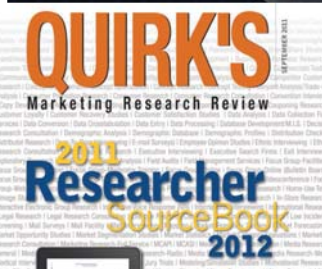
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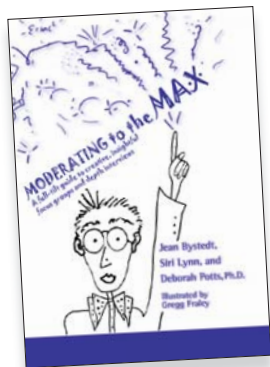
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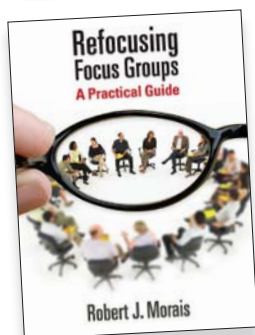
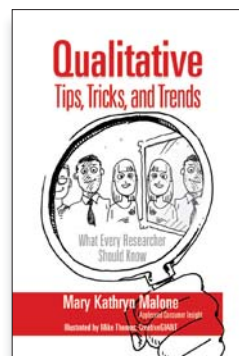
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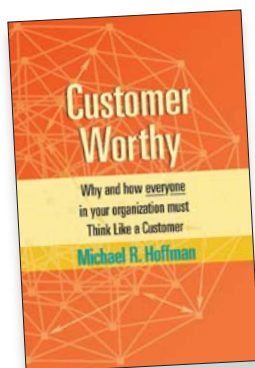
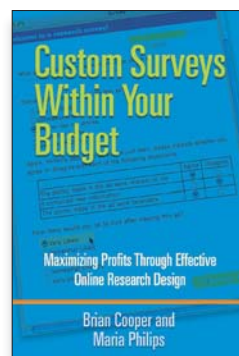
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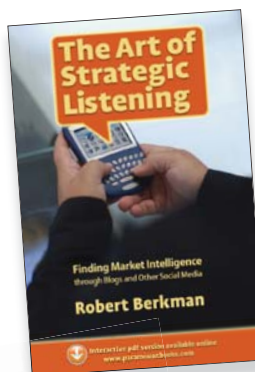
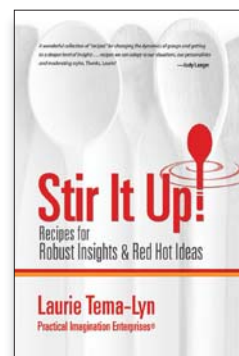
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Quirk's Marketing Research Review, (ISSN 08937451) is issued monthly by Quirk Enterprises Inc., 4662 Slater Road, Eagan, MN 55122. Mailing address: P.O. Box 22268, St. Paul, MN 55122. Tel.: 651-379-6200; Fax: 651-379-6205; E-mail: [info@quirks.com](mailto:info@quirks.com);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

Subscription Information: U.S. annual rate (12 issues) \$70; Canada and Mexico rate \$120 (U.S. funds); international rate \$120 (U.S. funds). U.S. single-copy price \$10. Change of address notices should be sent promptly; provide old mailing label as well as new address;

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POSTMASTER: Please send change of address to QMRR, P.O. Box 22268, St. Paul, MN 55122.

Article Reprints: Contact Claudia Stachowiak of Foster Printing at [claudias@fosterprinting.com](mailto:claudias@fosterprinting.com) or at 866-879-9144.

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# BEFORE YOU GO ●●● issue highlights and parting words

●●● cover-to-cover  
**Facts, figures and insights from this month's issue**

page  
**16** Globally, "getting a good education" and "being rich" are close to a tie.

page  
**33** Note to self: Carry along extra pens when doing research at today's progressive companies!

page  
**42** Attention to price alone will not generate a service that is deemed valuable by its customers.

page  
**52** Blending samples is a good way of spreading risk among many to avoid the potential ills of just one.

## Quirk's editorial calendar – some old, some new

Quirk's 2013 editorial calendar has been set. While many topics featured in 2012 will be included in the upcoming year's issues, we've also added mystery shopping (January), emerging methodologies (May) and utilities industry research (August). Each issue promises to include articles related to the featured topics but remember the content isn't limited only to the editorial focuses! For the full 2013 lineup, including deadlines, visit [tinyurl.com/quirksedcal](http://tinyurl.com/quirksedcal).



## Start planning for 2013!

Quirk's online calendar is already filling up with events for 2013 ([quirks.com/events](http://quirks.com/events)). From Webinars and training courses to conferences domestic and international, you can use the Quirk's calendar – and our new handy-dandy add-to-calendar feature – to plan your travel for next year. Be sure to keep checking back as we'll be adding more events and including even more information on the upcoming shows. If you have an event you'd like listed in the online calendar, contact Quirk's Content Editor Emily Goon at [emily@quirks.com](mailto:emily@quirks.com).

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Congratulations to September's winner, Emily Kragiel of EverBank, Jacksonville, Fla. September's prize was three free questions on the Toluna Mobile Omnibus.

A silver fountain pen is positioned diagonally across the top half of the page, resting on a faint background of a bar chart and a line graph. The pen's tip is pointing towards the bottom right.

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