

Fake brands,
real data

Corporate researcher
survey report

Tips for mobile
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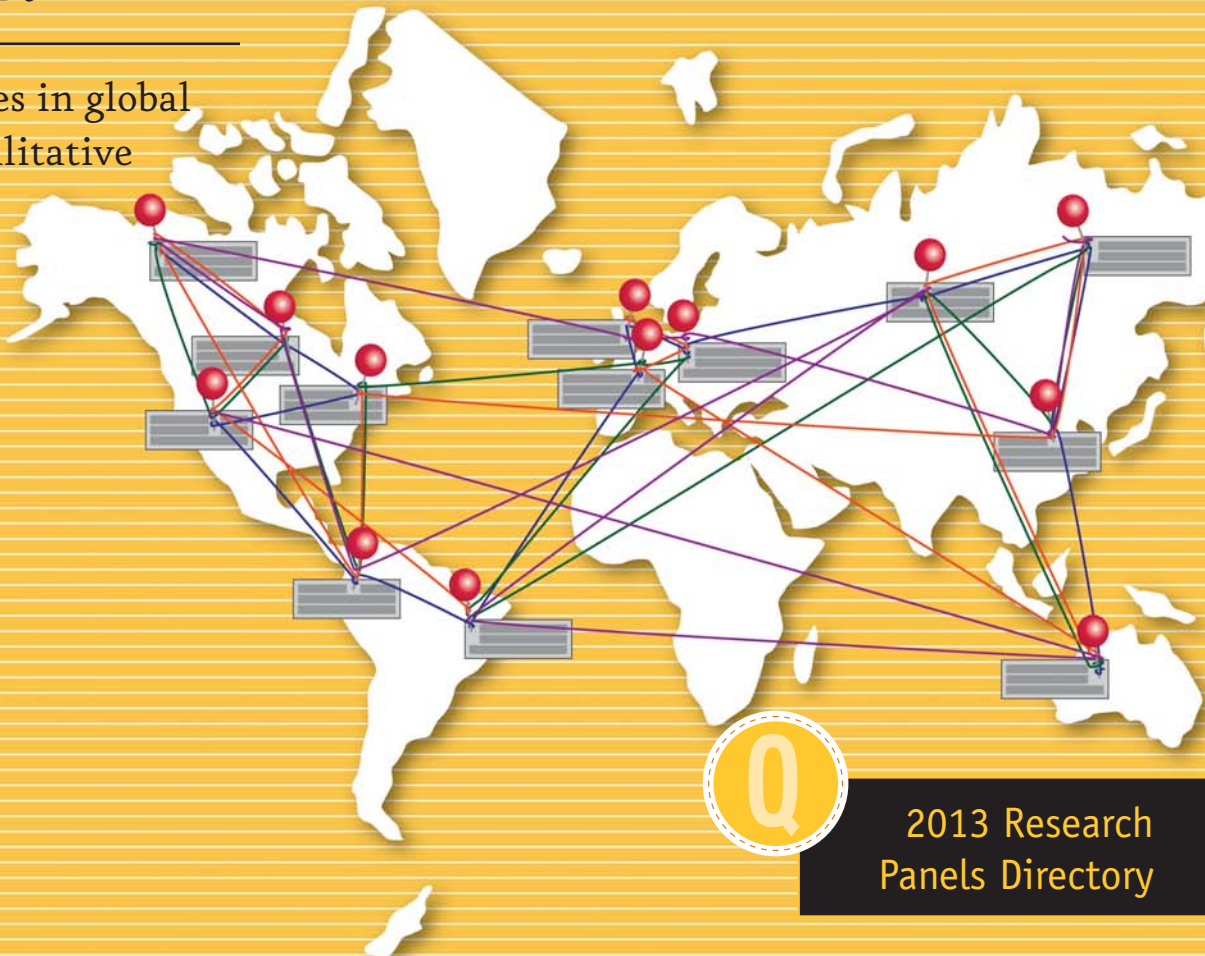
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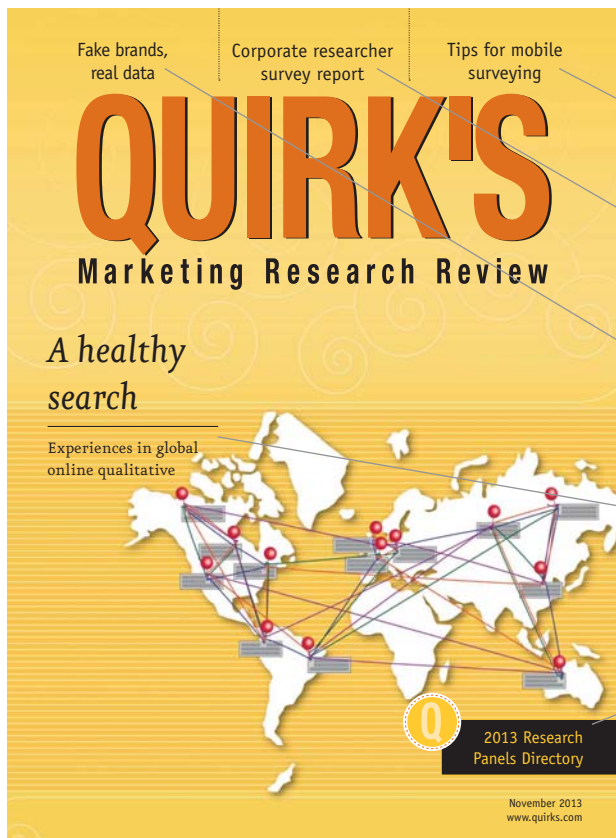
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... events

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In each issue of *Quirk's*, we include a Calendar of Events (p. 58) that lists all the marketing research-related happenings in the next few months but did you know we also have an online database that includes even more information on each event and spans 18 months? And starting in November, we're adding even more informa-

tion to include event discount codes – making Quirk's your one-stop shop for finding events and getting the best price possible.

New information will include:

- discount codes;
- estimated attendance;
- estimated percent client-side attendees; and
- event hashtags.

If you attend multiple research events each year, organize your calendar by downloading an Excel file of all the events listed. Check it out at quirks.com/events!



// Noted Posts

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●●● social media research

AG intervenes to protect the online consumer review

As consumers become more reliant on online reviews to guide purchases, companies have taken extreme – and extremely dishonest – measures to boost their image via online reviews. Dubbed “astroturfing,” posting fake reviews on consumer-review Web sites has become a common problem that compromises the quality and integrity of online reviews. Gartner projects that by 2014, 10-15 percent of social media reviews will be fake.

And it’s no wonder why astroturfing has become common practice: A 2011 Harvard Business School study estimated that a one-star rating increase on Yelp translated to an increase of 5-9 percent in revenues for a restaurant and Cornell researchers found that a one-star rise in a hotel’s online ratings on sites like Travelocity and TripAdvisor is tied to an 11 percent increase in room rates.

The good news is that the government is taking action to thwart astroturfing. On September 23, Attorney General Eric T. Schneiderman announced that Operation Clean Turf – a year-long undercover investigation into the reputation management industry, the manipulation of consumer-review Web sites and the practice of astroturfing – resulted in 19 companies agreeing to cease writing fake online reviews for businesses and to pay more than \$350,000 in penalties. Producing fake reviews violates multiple state laws against false advertising.

“This investigation into large-scale, intentional deceit across the Internet tells us that we should approach online reviews with caution. And companies that

continue to engage in these practices should take note: Astroturfing is the 21st century’s version of false advertising and prosecutors have many tools at their disposal to put an end to it,” said Schneiderman.



quirks.com/articles ID 20131101



●●● millennials

Gen Y and four new standards of luxury

The definitions of status, success and wealth are changing as Millennials come of age and reach peak earning years. According to Unit Marketing, there are four important ways in which Millennials are different from previous generations.

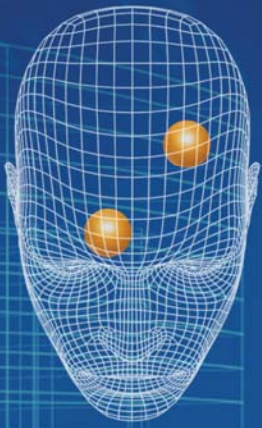
Millennials will reject the status symbols of their parents. Millennials will find status in achievements rather than purchases. They find significantly more satisfaction from earning a degree or completing an athletic event than by items they purchase. For example, a Millennial is likely to be more interested in owning a \$500 Ironman triathlon watch signifying the achievement than a \$5,000 brand-name watch.

Millennials will trade money for time and will therefore have less money to spend on luxury items. A Millennial may be willing work less overtime and see slower career progress to enjoy their time now.

Millennials will shift from conspicuous consumption to conscious consumption, guided by social, environmental and ethical values. This attitude is evident in the generation’s rent-rather-than-buy tendencies.

Millennials think of “luxury” as a marketer’s label. They are aware of marketing techniques and perceive the term “luxury” as a tool to entice them to buy rather than an adjective conveying something important about a product.

The Premier Online Consumer Panel



ailments



electronics



homeowners

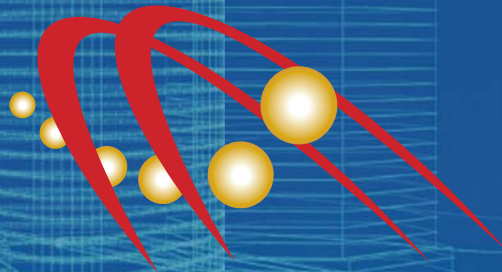


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Data Quality
Is Our Responsibility



An MR dispatch from Myanmar

In 2004, as part of a trip to Southeast Asia, my wife and I spent a half-day sightseeing in Myanmar, crossing the border from Thailand at Mae Sai. Back then Myanmar was still largely closed off to the rest of the world and though our border crossing was legal, it still had an air of danger about it.

These days, of course, things are completely different. With the dissolution of the military government in 2011 following general elections in 2010, Myanmar is open for business. And boy, is there business to be done. The country is rich in natural resources and the economy is expected to grow at an annual rate of 6 percent, attracting the interest of Western firms like General Electric and Coca-Cola, to name but a few of the companies that are establishing presences in the country formerly known as Burma.

Where there is business, there is a need for marketing research and when I learned earlier this year that Millward Brown was opening an office in Myanmar, I reached out to Lyndal Pearce, the country manager of Millward Brown in Myanmar, to arrange an e-mail interview about her experiences. This being our annual international research issue, it seemed the perfect time to bring it to you.

How much did you know about Myanmar and the area before being named to this post?

I began conducting research projects for international FMCG clients in Myanmar in 1996

and had lived and worked as a researcher in Myanmar for 10 years before joining Millward Brown. The work I led on developing contraceptive brands and the communications to support and grow those brands took me, and the Myanmar researchers I trained and worked with, deep into the fabric of relationships in Myanmar. I value this experience highly because it took us well below the veneers and gave us a good understanding of how family life, relationships and decision-making work in Myanmar.

I also worked as a market researcher in Vietnam between 1995 and 1997 at a time when the Vietnamese market was emerging from a long period of sanctions and global companies were beginning to enter an exciting, new market. I am finding this experience and my knowledge of Myanmar valuable in assisting clients now looking to engage in business here.

What types of research are being conducted there currently?

A lot of our work has been exploratory as clients investigate the Myanmar market and search for understanding and insights about Myanmar consumers. Clients who came into the market early are now also measuring the performance of their brands and communication campaigns. We have built our advertising pre-testing database and have already developed benchmarks for Myanmar, allowing us to conduct advertising pre-testing and truly partner with clients in the creative development of their communications.

Our research into advertising in Myanmar tells us that, as in other markets, advertising works when it is kept simple and the brand has a central role to play. Music, celebrities, love and attraction are common executional elements here and the ads that do well leverage on these intelligently. We have also learned that there is some skepticism about unfamiliar products and brands, possibly as a result of consumers having had to rely on grey-market channels to deliver



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Joe Rydholm can be reached at joe@quirks.com

goods when the market was closed.

Now Myanmar consumers are being inundated with new brands and seek to be convinced about them. They also want advertising to educate them about products that are new to them and, of course, they want to be entertained.


Who are your clients?

Our clients are mainly international FMCG companies with brands in the food, beverage, personal care, home care and pharmaceutical categories. Some are reengaging with Myanmar but many are entering the market for the first time.

What has you most excited?

The growth and development occurring in Myanmar now is remarkable and witnessing how people use the new opportunities coming their way is exciting.

What has you most nervous?

As more international companies enter the market, the demand on services, infrastructure and human resources grows and cost control is challenging at this time. Fortunately in the human resources area there are many talented, young Myanmar people returning home after studying abroad. They bring with them valuable skills and exposure to the international environment and are integral to our team. 



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// Survey Monitor



... brand research

Forget newfangled

Clean, comfortable and low-tech brands rank highest

Longstanding household names Quilted Northern, Jockey and Dawn beat out trendsetting technology brands in San Francisco consultancy Landor Associates' 2013 Breakaway Brands study. The only brand born in the digital era to make the top 10 was Amazon – along with its Kindle subbrand – and Apple fell off the list entirely.

The report ranks U.S. brands based on successfully sustaining growth in brand strength over a three-year period (2009-2012) and analyzes data from Young & Rubicam

Group's proprietary BrandAsset Valuator. There were four elements responsible for helping brands sustain long-term growth.

Insightful market research. At the top of Landor's Breakaway Brands list, Quilted Northern began its road to success in 2008 when the brand launched its three-ply Ultra Plush toilet paper in response to market research that showed that affluent women ages 45+ were willing to pay more for cleanliness. Its scores jumped more than 1,000 percent between 2009 and 2012.

Smart innovation and product extensions. No. 2-ranked Jockey introduced its Staycool technology and the antimicrobial Jockey Sport line. Dixie (No. 7) expanded beyond paper cups to a super-

strong line of disposable products called Dixie Ultra. Febreze (No. 6) launched Febreze Sport and Febreze Sleep Serenity. While it was once just a burritos and taquitos line, Jose Ole (No. 8) now offers almost everything you'd find in a Mexican restaurant. The oldest brand on the list, Thomas' (No. 9), known for its English muffin, now makes bagel thins and pitas. Lego (No. 10) targeted girls with its Lego Friends line.

Demonstrating social responsibility. In the aftermath of the 2010 Gulf of Mexico oil spill, Dawn (No. 3) used its soap to clean affected animals. This year, it used TV advertising and launched a series of YouTube videos about how Dawn is used in oil cleanup efforts that featured Rob Lowe's narration and compelling footage of animals.

Targeted engagement. Amazon's (No. 4) Amazon Prime program delivers highly relevant and valuable perks to repeat customers. Jockey's Twitter campaign encourages users to hashtag their workout updates with #everydayathlete.

In addition to the 10 breakaway brands, Landor chose five brands for its 2013 Watch List: Apple, Keurig, Reynolds Wrap, Microsoft Windows and Ford Sync. The Watch List brands have shown exceptional brand strength but face long-term uncertainty.

www.landor.com



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●●● employee research
Not so fast, Don Draper wannabes

MR analyst ranks fourth in underrated jobs; ad account exec most overrated

Working in marketing research might not be the most glamorous of professions but it still ranks among the top five on Carlsbad, Calif., job search site CareerCast.com's list of the most underrated jobs of 2013. Completing the top five are computer systems analyst, veterinarian, biologist and accountant – all of which are considered rewarding, low-stress, high-growth and offer a positive hiring outlook and competitive pay. Other jobs that made the list include electrician, plumber, accountant and librarian.

The top 12 most underrated jobs:

1. Computer systems analyst
2. Veterinarian
3. Biologist
4. Market research analyst
5. Accountant
6. Emergency medical technician
7. Legal assistant
8. Civil engineer
9. School principal
10. Plumber
11. Electrician
12. Librarian

On the opposite end of the spectrum, topping CareerCast.com's list of most overrated jobs are those that face high stress and long hours. While the perception that working at an advertising or public relations agency handling big-name accounts and working with celebrities is fun and exciting, the reality is often different. Employees in these highly competitive industries are often overworked and underpaid and likely to lose their jobs if a large account moves to another agency.

The top 12 most overrated jobs:

1. Advertising account exec
2. Surgeon
3. Stockbroker
4. Public relations manager
5. Senior corporate executive
6. Event coordinator
7. Architect
8. Commercial airline pilot
9. Attorney
10. Computer programmer
11. Economist
12. Psychologist

www.careercast.com



●●● coupon research
Marriage saves?

Survey shows married adults more promo code-happy

Online promotional codes and coupons have become more prevalent among retailers in recent years while other events such as the economic downturn have caused consumers to be savvier savers. According to a survey conducted by Rochester, N.Y., research company Harris Interactive on behalf of

PromotionalCodes.com, Santa Monica, Calif., married individuals shopping online are more likely than single online shoppers to use promotional codes (71 percent vs. 63 percent).

The survey also found that 74 percent of online shoppers with children in the household at least sometimes use promotional codes when shopping online, compared to 67 percent of those without children present. Comparing women to men, 76 percent of females at least sometimes use promotional codes when shopping online versus 63 percent of males.

Thirty-two percent of college graduates and those with higher education always/often use promotional codes when shopping online, compared to 27 percent of those with a high school education or less. One-third of those with a total yearly household income of \$75,000 or more always/often use promotional codes when shopping online, compared to 24 percent of those with a total yearly household income of less than \$35,000.

www.harrisinteractive.com



●●● advertising research
In TV we trust

Traditional media remain most trusted as new methods gain ground

Whether it's advertising via old standbys like TV, newspapers and radio or via newer media like mobile and online, earning consumer trust is the holy grail of a successful campaign, according to the Trust In Advertising report from New York

researcher The Nielsen Company. The good news for advertisers is that consumers around the globe are more trusting now than they were several years ago and trust in online advertising is increasing, as is trust in ads on TV, radio and movie screens.

Word-of-mouth recommendations from friends and family, often referred to as earned advertising, are still the most influential, as 84 percent of global respondents across 58 countries said this source was the most trustworthy. Trust in advertising on branded Web sites increased 9 percentage points to 69 percent in 2013 as the second most-trusted format, a jump from fourth-place in 2007. Sixty-eight percent indicated that they trust consumer opinions posted online, which ranked third in 2013. In addition to an increase in trust in messages on branded Web sites, 56 percent of respondents said they trust consumer-consented e-mail messages, an increase of 7 percentage points since 2007.

For other online advertising, almost half said they trust ads in search engine results, online video ads and ads on social networks. Forty-two percent trust online banner ads, up from 26 percent in 2007. Forty-five percent believe display ads on mobile phones are credible and 37 percent trust text ads on mobile phones, up from 18 percent in 2007.

Ads on television, in newspapers and in magazines continue to be among the most trusted forms of paid advertising. Trust in television ads increased from 56 percent in 2007 to 62 percent in 2013. Sixty percent trust ads in magazines, a 4 percent rise over 2007. Newspaper ads were the only format to decline in the six-year period, as 61 percent of respondents found newspaper ads credible in 2013, two percent from 2007.

Ads on radio (57 percent) and before movies (56 percent) both gained consumer trust, reporting increases of 3 and 18 percent, respectively, since 2007. Trust in brand sponsorships (61 percent) increased 12 percent from 2007. Trust in billboards and outdoor advertising (57 percent), TV program product placements (55 percent) and editorial content such as newspaper articles (67 percent) were not included in Nielsen's 2007 survey.

www.nielsen.com



●●● health care research Paging Dr. Google

Consumers rely on the Web to research health care

Online health information, including medical resources and patient community connections, continues to play an important role in patient education and self-care. According to a survey conducted by Makovsky Health, New York, and Culver City, Calif., research company Kelton, the average U.S. consumer spends nearly 52 hours looking for health information on the Internet annually but only visits the doctor three times. Further, physicians

remain a key influencer sparking online health research, as Americans are most likely to visit a pharma-sponsored Web site after receiving a physician's diagnosis (51 percent).

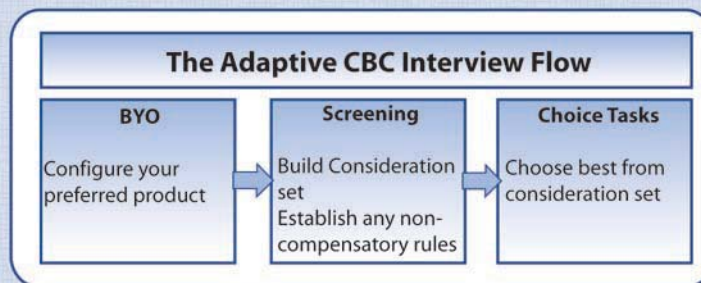
WebMD remains the most accessed online resource for health information (53 percent), followed by Wikipedia (22 percent), health magazine Web sites (19 percent) and advocacy group Web sites (16 percent). Social media channels continued to rank relatively low, with YouTube being used by 12 percent of people searching for health care information online and Facebook and blogs both visited by 10 percent of Americans. However, social media channels are visited by 24 percent of consumers who use at least one or a combination of these platforms to seek health care information.

With respect to health care reform research, 65 percent of respondents have spent less than an hour or no time at all searching over the past year. On the other end of the spectrum, 15 percent of Americans have spent more than six hours researching health care reform and 10 percent have logged between one and two hours of research.

www.keltonglobal.com

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IN FOCUS

Product and Service Update

●●● online research Added virtues for virtual

Webcam interviewing tool sees end-to-end updates

Nashville, Tenn.-based 20|20 Research has launched the next generation of its QualMeeting real-time Webcam interviewing software. QualMeeting 2.0 features a virtual lobby for participants; new interviewing tools such as drag-and-drop card sorting, polling questions and storyboarding; and expanded technical support. Additionally, a dedicated teleconference line for clients aims to ensure a behind-the-glass experience.

To shorten the review process, the solution includes a real-time integrated speech-to-text engine for a quick search of recorded conversation and an autoskip tool designed to isolate a single participant and his comments during a session.

20|20 also introduced a companion service, QualMeeting+Plus, to bundle training, project management and technical assistance.

www.2020research.com

●●● data analysis Portal for big data

Cloud-based tool includes over 150 million socioeconomic development indicators

Prognoz, a Perm, Russia, business analytics company, has released the Prognoz Data Portal, a cloud-based tool designed to monitor and analyze more than 150 million socioeconomic development indicators from over 200 national and international data sources.

Built on the Prognoz Business Intelligence Platform, Prognoz Data Portal is intended for experts and analysts in business and the public sector focused on marketing research, business development, product development and business strategy. It offers a range of macroeconomic indicators from a variety of sources, including national statistical services, international organizations and trade associations.

Prognoz Data Portal also includes a native search engine to filter and sort search results based on user-supplied criteria. In addition, time series analysis capabilities allow Data Portal users to analyze changes in indicators found over time using advanced statistical methods.

Queries can be saved, exported to different popular formats or used to create dashboards. Additionally, Data Portal allows users to format reports through a variety of business graphics.

www.prognoz.com/en/data_portal.php

●●● data analysis Reporting at the speed of light

Beacon improves performance, customization

Fresno, Calif., research company Decipher Inc. has updated its Beacon survey and reporting platform to improve speed and allow users to upload video with custom elements, such as dial testing, into surveys.

The reporting tool interface is designed to offer more flexibility to create banners, segments, table sets and to save and share reports. Updated export controls and report-sharing options are coupled with increased speed and performance, including easy selection of tables and graphs to create custom reports; the ability to save reports as shared, public or private; and new controls for exporting reports to PowerPoint or Excel.

Beacon also allows users to upload video content while utilizing the survey-building interface.

www.decipherinc.com

●●● diy research Supplementing self-serve solutions

Toluna updates QuickSurveys and SampleXpress

Wilton, Conn., research company Toluna has upgraded its DIY tool Toluna QuickSurveys. By combining QuickSurveys with the TolunaAnalytics reporting, visualization and analysis tool, users can create field reports, crosstabulations and PowerPoint presentations within minutes of launching a survey. TolunaAnalytics aims to provide advanced yet easy-to-use features to weight data, create custom segments and conduct significance testing.



quirks.com/articles

ID 20131104

Additionally, Toluna has debuted SampleXpress, a self-serve sampling platform designed to allow Toluna clients to choose survey respondents, assess feasibility and price and launch and remotely manage projects at any time. The platform includes an application programming interface for clients looking to request sample from within their own supply-chain systems. SampleXpress users can add, subtract or otherwise modify sample sources, including those of third-party suppliers, while projects are in the field.
www.toluna-group.com

●●● data analysis

A better Bayesia

Get a handle on Bayesian networks with updated software

France-based research software company Bayesia has launched BayesiaLab 5.2, a desktop application (Windows/Mac/Unix) designed for knowledge discovery, data mining, analytics, predictive modeling and simulation – all based on the paradigm of Bayesian networks.

BayesiaLab aims to allow users to apply artificial intelligence tools to accelerate research workflows. Updates include a redesigned target optimization tool, which uses a genetic algorithm for comprehensive optimizations; automatic computation of contributions for each network generated through multi-quadrant analysis; disjunctive inference and negation of the evidence set for scenario analysis; workspace to start BayesiaLab with a set of previously-opened networks; and a token-borrowing function for floating licenses, which allows users to work offline.
www.bayesia.com

●●● diy research

An open-ended partnership

SurveyMonkey and NVivo integrate to offer data analysis

SurveyMonkey, Palo Alto, Calif., and QSR International, a Doncaster, Australia, research software company, have partnered to combine SurveyMonkey with the NVivo data analysis platform to assist users in managing open-ended survey responses. Users can collect open-ended responses via SurveyMonkey and then bring data into NVivo for analysis. The new functionality for SurveyMonkey and NVivo is available as a standard feature in the latest versions of both software tools.
www.surveymonkeyandnivo.com

●●● retailing research

Three-app sampler

New apps predict and track shopper behavior

Prosper Insights and Analytics, Worthington, Ohio, has released its latest Smart Data Apps, including the Prosper Auto Outlook, the Retail Composite Spending Score and Outlook and the Lost Opportunity analytic, designed to help marketers analyze their competitive environment. The apps are available via Prosper's InsightCenter technology.

The Prosper Auto Sales Outlook aims to provide marketers with directional insight into lightweight vehicle sales month-over-month and year-over-year, allowing automakers, insurance agencies, financial services, dealerships, manufacturers, analysts and investors to monitor projected auto sales.

The Prosper Composite Spending

Score represents consumers' intended level of retail spending over the next 90 days. The Prosper Retail Outlook takes this one step further and projects the average direction of seasonally-adjusted retail sales, excluding automobile dealers and gas stations, over the next 90 days.

Lost Opportunity is intended to provide retailers with insight into how many people are shopping in their stores most often for one category yet shopping a competitor for other categories. It also identifies how much money those shoppers are worth.
www.prosperinsights.com/showcase

●●● reporting software

Say no to copy/paste

E-Tabs pairs charting tool with PowerPoint

London research company E-Tabs has launched E-Tabs Graphique, an ad hoc charting tool that is embedded into PowerPoint. E-Tabs Graphique is designed to offer instant visualization of research data. All outputs are in native PowerPoint and fully editable. Additional features include ranking and sorting, reusable data filters and chart styles and intelligent data matching.
www.e-tabs.com/graphique

●●● mobile research

Hybrid for handhelds

Vision Critical launches qual/quant mobile solution

Vancouver, B.C., research company Vision Critical has debuted Mobile Discussion Forums, a product designed to offer integrated mobile qualitative (ideation) and quantitative (survey) research options in one feedback-gathering tool.

Using Mobile Discussion Forums,

members can create new posts, comment, reply and vote on their favorite discussions. Conversation threads are maintained and presented in an easy-to-navigate flow and moderators can reply, edit and star posts, while removing any inappropriate posts, all from their handset. Moderators can create forums for desktop and mobile users with no special authoring required and most smartphones are supported.

www.visioncritical.com

●●● mobile research Making mystery shopping mobile

ShopTalk brings automation and immediacy to mystery shopping

Civicom Marketing Research Services, Greenwich, Conn., has launched Civicom ShopTalk, a self-administered mobile ethnographic research tool designed to let researchers collect user-generated content through mobile diaries. ShopTalk is especially geared toward mystery shopping.

Using Civicom's mobile communications tools, ShopTalk lets mystery shoppers make real-time audiorecordings of their observations and insights. ShopTalk can be used with any mobile device and even with landlines. Mystery shoppers can press one number on their mobile device to start recording and upload text, photos, videos and documents.

Shopper recordings go into Civicom's database, where they are sorted by shopper, event, time and date. Users can listen to these at any time and Civicom produces a report that includes text and sentiment analysis. Data can be additionally enhanced with infographics.

www.civi.com

●●● facial coding Expression and emotion

AdProbe measures physical and emotional response to campaigns

U.K.-based research company Vision One has launched AdProbe, a tool designed to measure the performance of advertising (including TV and radio) against seven emotional triggers, linking them via an E-index score to purchase intentions and overall ad effectiveness.

The tool, which uses facial expression analysis software, can be used in pre-testing, ongoing campaign tracking or in focus groups. It also aims to provide insights into brand fame and potential buzz among target audiences.

www.visionone.co.uk

●●● advertising research Peeling back the layers

Tool uses big data to understand audiences

Acxiom, a Little Rock, Ark., research company, has debuted the Audience Operating System (AOS), a marketing platform designed to integrate disparate sources of media channels and technology into an open platform. AOS consists of three layers: data, audience operations and applications.

AOS can incorporate virtually any legally-usable data elements – first-party, third-party or otherwise. The data layer offers context to understand your audiences, including the attributes needed for segmentation, the match data used for campaign deployments and Acxiom predictive models for further context.

The audience operations layer bridges traditional CRM and DMP information to bring together disconnected audiences.

The applications layer hosts browser-based tools for accelerating marketing efforts. AOS is pre-loaded with Acxiom's core applications and supports apps from Acxiom's development partners.

www.acxiom.com

●●● Briefly

■ Research companies GfK, New York, and Pointlogic, Rotterdam, the Netherlands, have partnered to integrate data from GfK's Automotive Image Barometer Study with a Pointlogic interface in one platform. Dubbed GfK-Pointlogic Brandpoint, the solution aims to allow users to analyze Image Barometer findings with interactive graphics and charting. The platform consists of an Insights Module and an ROI Module.

www.gfk.com/us

■ New York researcher The Nielsen Company has launched TOPTEN, a mobile app that aims to provide insight into trends across a variety of category lists, including TV shows, music, movies, Web sites, books, video games, mobile apps and consumer products. The app is available in the U.S. for iPhone, iPad and Android devices.

www.nielsen.com

■ Harpeth Marketing, a Franklin, Tenn., marketing consulting firm serving the market research industry, has launched the M|R Marketing Workshop, an online educational program developed to teach participants the process of marketing and sales and help them create a customized business development plan.

Participants are required to log in every two weeks for a two-hour session over a six-week period. During this time, Harpeth Marketing provides one-on-one telephone coaching; reviews each participant's final marketing and sales plan; and provides quarterly,

one-on-one telephone coaching over the following year.

www.mrmarketingworkshop.com

■ Berlin research company SensoMotoric Instruments (SMI) has released the next generation of its SMI Eye Tracking Glasses. SMI Eye Tracking Glasses 2.0 have been updated to offer a pocket-size recorder designed to allow fully mobile in-field research and record extra-long tasks and work sessions.

www.smivision.com

■ Atlanta research company StandPoint has debuted the Activation Workshop, an interactive program designed to help companies put their research plan into motion. The workshop is three days long spread over a two-week period.

www.standpointgroup.com

■ New York research company Hall & Partners has launched *Connect: Big Thinking on Our Connected World*, a publication focused on thought leadership regarding brand engagement in the digital world.

www.hallandpartners.com/connect

■ Catalyst Healthcare Research, Nashville, Tenn., has released 5 Questions to Ask About Patient Experience Surveying, a white paper intended to help health care executives understand how to maximize ROI in patient experience surveying.

www.catalysthealthcareresearch.com

■ Nimbus-Online Inc., a Bellevue, Wash., research company, has released a white paper that details how its BioNimbus technology is suited for packaging research in a 3-D virtual reality space.

www.nimbus-online.com

■ Aptel Research, Cambridge, Mass., has launched the Patient Voices Syndicated Report Series, which aims to provide insights into the emotional and rational factors that impact the patient journey through specific chronic diseases in specialty markets. The first report covers multiple sclerosis in the U.S.

www.aptelresearch.com

■ Norrköping, Sweden, research software company Dapresy has updated its Dapresy Pro research reporting solution with version 8.3. Improvements include greater capacity, more choice in the statistics that can be applied to a report and new options such as bringing statistical tests, significance and confidence limits into market research data analysis charts. The solution also features a new software interface to communicate directly with other data hosts and data collection platforms.

www.dapresy.com

■ Decision Resources, a Burlington, Mass., research company, has released its Strategic Insights report series to evaluate industry trends to inform biopharmaceutical corporate, commercial, development and marketing strategies.

www.decisionresources.com

■ The Optimization Group, an Ann Arbor, Mich., research company, has launched the Advertising Agency Hub, a resource for advertising agencies to learn how to use research to help their clients succeed.

www.optimizationgroup.com

■ Tokyo research company AIP Corporation has added Australia to its twice-monthly omnibus. Australia is the 13th country or region covered.

www.aip-global.com

■ London-based Ipsos Healthcare has launched its syndicated patient journey studies with OncoJourney, which offers a view of the oncology patient journey.

www.ipsos.com

■ InCrowd, a Cambridge, Mass., research company, has launched InCrowd Answers, a DIY intelligence-gathering tool for the pharmaceutical industry.

www.incrowdnow.com

■ Reston, Va., research company ComScore Inc. has released mobile commerce (m-commerce) sales estimates by product category occurring on both smartphones and tablets. ComScore's m-commerce measurement capability builds upon its existing top-line tracking of m-commerce spending that began in 2010.

www.comscore.com

■ Hertfordshire, U.K., research company 2Europe Ltd. has changed its Web address to www.2-europe.com.

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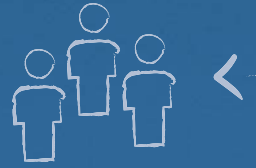
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*CTIA - The Wireless Association, Wireless Quick Facts, 2012

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An analysis of the impact of survey scales

| By Adam S. Cook

snapshot

Adam Cook examines many options for survey scales and offers some research-on-research that explores the effects of various scale point ranges.

Survey scales are important because they help differentiate the degree to which people feel toward certain questions. Yes-or-no responses are not always an option in consumer perceptions and feelings. But what's the best numeric scale to use in analyses and what scale is easiest for the respondent to interpret?

If it's a paper or phone survey, sophisticated and/or easily-misinterpreted scale questions can be a real challenge. A scale can't have too many radial points (e.g., you don't want to ask on a scale of 0 to 100, where 0 = x and 100 = y) or too many descriptors defining each point (e.g., completely, somewhat, rarely, never, neutral, etc.). If we don't include a number of options, our ability to analyze differentiation in responses becomes more limiting (e.g., a 1-to-3 scale doesn't give us a whole lot of information to differentiate between responses). See Figure 1 for varying examples of scale questions.

Thankfully, interactive online surveys exist and they have some real untapped potential for finding the sweet spot between maximizing participation and analytic reliability or differentiation. Given the challenges presented in traditional collection methods, I'm going to focus on the ideal for interactive online scales.

Even vs. odd number of scale collection points. The options are many: 1-to-10 (10 options) or 0-to-10 (11 options); 0-to-7 (eight options) or 1-to-7 (seven options); 0-to-5 (six options) or 1-to-5 (five options). I've usually heard the value of even-numbered scales is that they require respondents to choose or

lean toward one of the extremes on the scale presented. I understand the desire to acquire definitive feelings but the truth is that some people have no feeling, one way or another, toward certain things (an inconvenient reality to some decision makers). I believe eliminating the neutral option interjects bias into the results and ultimately the analysis. I feel it's "extremely important" to use odd-numbered scales, ones that have the option to select a true mid-point of neutrality. But sometimes you have to deal with the scale that may be given to you to analyze. We're not always in a position to choose.

Number of scale points: three, five, seven, nine, 11, 13 . . . ? Well, we know one scale point isn't an option and I'm ruling out even-numbered scales. Here's what I do know (from the book *Marketing Research: Methodological Foundations*): "Research indicates a positive relationship between the number of scale points and reliability."

Having a large number of scale points is important for analyses. If you're using a radial point scale collection method, having a scale exceeding 0 to 10 or 1 to 11 (11 points) can look overwhelming. With a radial scale point display, I would recommend not exceeding 11. It's important to note: If you are going to display the numbers on the scale, your maximum scale should probably be 0 to 10. Many books have been written on the importance of this scale and its ease of translation to potential respondents. Zero is typically defined as bad and 10 is usually associated with the highest of marks. A scale of 1 to 11 wouldn't work because 11 is not commonly associated with



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Figure 1

Examples of scale question displays

1) Traditional check box scale with descriptors

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree
1. This scale is easiest for respondents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. This scale is best for analyses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2) Radial point scale with scale point descriptors

Q1) This scale is easiest for respondents:

3) Radial point scale with description of numeric points

Q1) On a scale of 0 to 10, 0 = Not at all important, 10 = Extremely important, how would you rate the following:

4) Radial point scale with extreme point descriptors

5) Sliding scale with extreme point descriptors

(placeholder visible in the center with the option to move to desired location on scale)

6) Sliding scale with extreme point descriptors

(placeholder made visible when clicking on the scale)

perfection or rankings. Sometimes 1 is considered the best as well without a clear definition (very similar to the defining an ace as high or low in card games). This lack of a clear association may create confusion.

Here's where an interactive scale can help us overcome participation and visual fatigue. The use of sliding-scale displays enables us to remove the need to display numbers (see options five and six in Figure 1 for visual examples of sliding scales). With the numbers coded into the background, you need not worry about confusion or overwhelming radial point displays. In fact, the scale coded into the background is ultimately up to the analyst developing the interactive survey. The sliding scale can even get us a scale greater than 11 points to help maximize reliability. Technically we would be limitless, but 0 to 1 billion sounds like a bit much. If you don't like the idea of 101 points spanning 0 to 100, simply create 101 points spanning 0 to 10. It's simply moving the decimal point to the tenths (e.g., 0, 0.1, 0.2, 0.3 ... all the way up to 9.8, 9.9, 10). I have yet to see this offered as a scale option but I'd love to have this capability. This brings us to our last quandary of where to start our scale.

Starting a scale with a 1 or a 0.

If you're displaying numbers, it's actually pretty arbitrary in terms of what you use as long as the numbers are clearly defined. It's ultimately the number of scale points that dictates the strength of your analysis. A 1-to-10 scale is essentially the same as a 0-to-9 scale or, as crazy as it may sound, a 2-to-11 scale. I would hope it's self evident that if you're using a low-end descriptor of "not at all, none, never" or anything that's a definitive null, then 0 is the best number to start with on the scale. I really don't have a case for using 1 and I'm not completely sure why scales do start with a 1 for display or analysis purposes. Until I hear a solid case or rationale for using 1 to start the scale, I'm going to stick to 0 when given the option. Data collection with 0-to-10 also has the easiest conversion to percentage analyses.

Obviously the choice and preference in scales used is ultimately yours but it is worth considering the

Figure 2

Good:

0-to-10 radial-point scale with extreme point descriptors (11 scale points)

Better:

0-to-10 sliding scale with extreme point descriptors (11 scale points)

Best:

0.0-to-10.0 sliding scale with extreme point descriptors (101 scale points)

Figure 3

Average vs. median scale analysis

Based on random results from two separate samples (2011 and 2012) of 100 respondents. Random responses based on a scale of 0 to 10.

	2011 Scores	2012 Scores	2012 vs. 2011
Average	4.76	5.33	11.97%
Median	4.00	6.00	50.00%
Average vs. Median	19.00%	-11.17%	-76.05%

Figure 4

Rounding impact on average scale analysis

Based on varying results from six separate samples. Responses based on a scale of 0 to 10.

	Actual	Rounded	Actual vs. Rounded
Group A	4.00	4.00	0.00%
Group B	5.00	5.00	0.00%
B vs. A	25.00%	25.00%	0.00%

	Actual	Rounded	Actual vs. Rounded
Group C	4.49	4.00	12.25%
Group D	4.50	5.00	-10.00%
D vs. C	0.22%	25.00%	-99.11%

	Actual	Rounded	Actual vs. Rounded
Group E	3.50	4.00	-12.50%
Group F	5.49	5.00	9.80%
F vs. E	56.86%	25.00%	127.43%

implications of your choice. Figure 2 represents my preferences.

Scale analysis options and pitfalls

Why median scores are a bad idea.

Medians are good for analyses that incorporate extreme outliers in data. Household income is probably the best example of when to use a median in analysis. One billionaire can make an average income analysis skyrocket. Since we're analyzing a scale, there's a distinct and established range. The percent differences can be significant from one data set using averages in analysis versus another using medians. See Figure 3 for a random example of 100 respondents analyzed using medians versus averages.

The average analysis was 19 percent higher than the median analysis in 2011 and 11 percent lower in 2012. Conversely, when you analyze the change from 2011 to 2012, we see a 12 percent increase in average scoring, while the median analysis shows a 50 percent increase. If this isn't enough to put the nail in coffin of median analyses on scale questions, I don't know what is.

Why rounding averages is another bad idea.

In Figure 4's example of two different average scores, where Group A = 4 and Group B = 5, Group B's average score is 25 percent higher than Group A's. What if Group A's average was actually 4.49 and Group B's was 4.51? The difference would be minimal. What if Group A's average was actually 3.50 and Group B's was 5.49? Group B's average score would be 57 percent higher. The range in difference is anywhere from 0 percent to 57 percent. This would indicate to me that's it's a bad idea to round results

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Figure 5

Percentage grouping impact on scale analysis

Based on varying results from six separate examples of 25% scoring 7 or higher. Responses based on a scale of 0 to 10.

Scale	Ex. 1	Ex. 2	Ex. 3 (Min)	Ex. 4 (Max)	Extreme (-)	Extreme (+)
0	10	10	10	10	75	0
1	10	10	10	10	0	0
2	11	11	11	11	0	0
3	11	11	11	11	0	0
4	11	11	11	11	0	0
5	11	11	11	11	0	0
6	11	11	11	11	0	75
7	13	1	25	0	25	0
8	8	3	0	0	0	0
9	3	8	0	0	0	0
10	1	13	0	25	0	25

Scoring	Ex. 1	Ex. 2	Ex. 3 (Min)	Ex. 4 (Max)	Extreme (-)	Extreme (+)
7 or higher score	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%
Median score	4.00	4.00	4.00	4.00	0.00	6.00
Average score	4.22	4.63	4.05	4.80	1.75	7.00
Percentage conversion	42.20%	46.30%	40.50%	48.00%	17.50%	70.00%

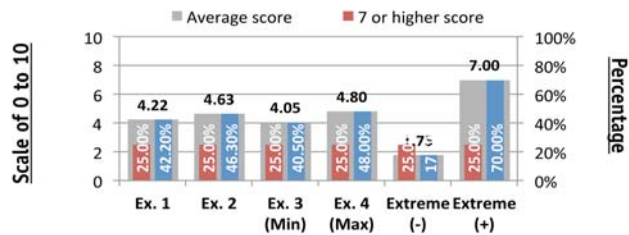
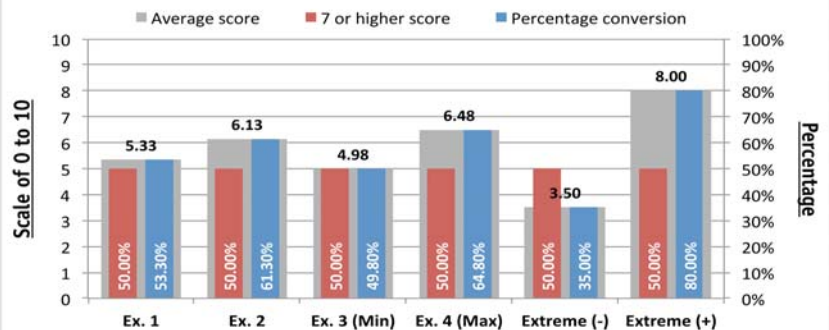


Figure 6

Percentage grouping impact on scale analysis

Based on varying results from six separate examples of 50% scoring 7 or higher.



Based on varying results from six separate examples of 75% scoring 7 or higher.

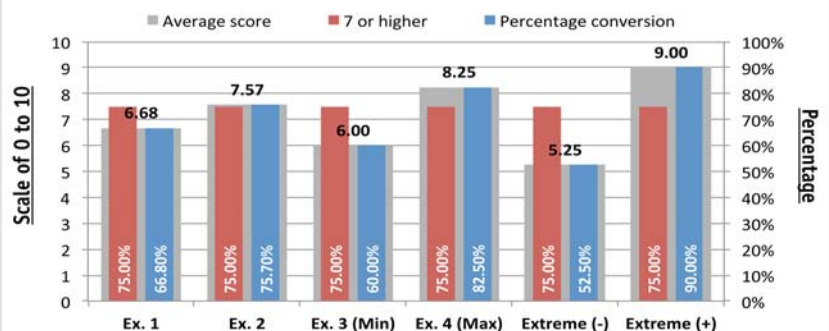


Figure 7

Average scale score to percentage conversion

Scale	Formula
1 to 11	$(\text{Average Score} - 1) \div 10$
*0 to 10	$(\text{Average Score}) \div 10$
1 to 10	$(\text{Average Score} - 1) \div 9$
0 to 9	$(\text{Average Score}) \div 9$
1 to 9	$(\text{Average Score} - 1) \div 8$
0 to 8	$(\text{Average Score}) \div 8$
1 to 8	$(\text{Average Score} - 1) \div 7$
0 to 7	$(\text{Average Score}) \div 7$
1 to 7	$(\text{Average Score} - 1) \div 6$
0 to 6	$(\text{Average Score}) \div 6$
1 to 6	$(\text{Average Score} - 1) \div 5$
0 to 5	$(\text{Average Score}) \div 5$
1 to 5	$(\text{Average Score} - 1) \div 4$
0 to 4	$(\text{Average Score}) \div 4$

Example 1

Average Score (1 to 10): 4.65

Percentage Conversion:
 $(4.65 - 1) \div 9 = 40.56\%$

Example 2

Average Score (0 to 10): 4.65

Percentage Conversion:
 $(4.65) \div 10 = 46.50\%$

Example 3

Average Score (1 to 5): 4.65

Percentage Conversion:
 $(4.65 - 1) \div 4 = 91.25\%$

*Optimal Scale

in analyses. See Figure 4 for examples of the impact in rounding averages.


Why percentage groupings can actually misinterpret results. I've seen reports and analyses that group numbers together from a scale question. See Figure 5 for an example of grouping 7s or higher on a scale of 0 to 10. All of the examples used in Figure 5 have 25 percent scoring a 7 or higher.

It didn't occur to me until recently how inaccurate these groupings can be in analysis. When you start creating a number of different scenarios, some random and some extreme, the variations are a wake-up call. In Figure 5, Example 3 Minimum and Example 4 Maximum share the same 25 percent scoring a 7 or higher, but Example 4's average score is 19 percent higher than Example 3's.

At its most extreme in scoring, shown as "Extreme (-)" or "Extreme (+)," the maximum can be 300 percent higher than the minimum. See Figure 6 for additional analysis comparisons in averages (non-rounded) versus the grouping method for 50 percent and 75 percent scoring 7 or higher on a scale of 0 to 10.

Converting the scale analysis into percentage representation.

Scale analysis can be converted into a percentage analysis (as already seen in Figures 5 and 6). If you're using a 0-to-10 scale, simply moving the decimal point converts your average scores into percentage representation. At its lowest, the entire sample giving 0s equates to 0 percent and at its highest, the entire sample giving 10s equates to a 100 percent. If you're using a scale other than 0-to-10, you'll need to use a less-obvious conversion formula. The conversion formula for varying scales other than 0-to-10 can be found in Figure 7. For an example of scale impact and conversion on a scale of 1-to-10, see Figure 8.

Not all analyses are equal. In fact, some can be downright deceptive. My advice: When you can, use 0-to-10 scales, conduct average (non-rounded) analyses and convert to percentage analyses when needed. 

Adam Cook is director of research and development at Pilot Media Inc., Norfolk, Va. He can be reached at 757-446-2664 or at adam.cook@pilotonline.com.

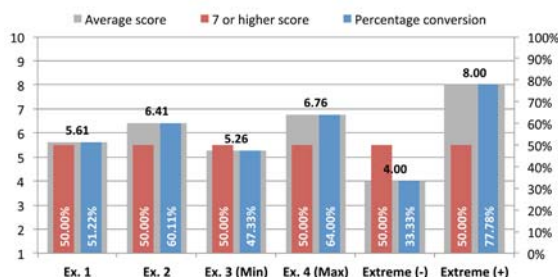
Figure 8

Percentage grouping impact on scale analysis

Based on varying results from six separate examples of 20% scoring 7 or higher. Responses based on a scale of 1 to 10.

Scale	Ex. 1	Ex. 2	Ex. 3 (Min)	Ex. 4 (Max)	Extreme (-)	Extreme (+)
1	8	8	8	8	50	0
2	8	8	8	8	0	0
3	9	9	9	9	0	0
4	8	8	8	8	0	0
5	9	9	9	9	0	0
6	8	8	8	8	0	50
7	30	5	50	0	50	0
8	10	5	0	0	0	0
9	5	10	0	0	0	0
10	5	30	0	50	0	50
Scoring	Ex. 1	Ex. 2	Ex. 3 (Min)	Ex. 4 (Max)	Extreme (-)	Extreme (+)
7 or higher score	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%
Median score	6.50	6.50	6.50	8.00	4.00	8.00
Average score	5.61	6.41	5.26	6.76	4.00	8.00
Percentage conversion	51.22%	60.11%	47.33%	64.00%	33.33%	77.78%

*Percentage Conversion Formula: $(\text{Average Score} - 1) \div 9$





case
study

●●● international research

Hunting for healthy new ideas

Experiences in global online qualitative

| By Janet Ziffer and Mike Mabey

snapshot

Researchers from Kimberly-Clark Professional and SKIM offer experience-based tips and strategies for how to use online message boards for a global research project.

Kimberly-Clark Professional (KCP) is a Roswell, Ga.-based global provider of products and services that help make workplaces healthier, safer and more productive. Recently, when KCP was looking to undertake a study of office workers in 10 countries, it chose online qualitative message boards as the research methodology.

Although this approach offered many clear advantages given the study's global scale and ambitious scope, it also presented executional challenges. For while researchers from KCP and its vendor partner SKIM routinely conduct global studies, the demands of working across multiple time zones, cultures, languages and business units are amplified when using a data-gathering platform that allows for long fielding periods, almost limitless open-ended responses and real-time client involvement. Successfully executing such a project requires special considerations with regard to managing time, recruitment, stakeholder expectations, discussion content and reporting.

The challenge in this case was to understand office workers' behaviors and needs in the workplace globally to identify white spaces where KCP could develop new products and solutions. More specifically, KCP wanted to understand the everyday working life of office workers in 10 countries: the U.S., Canada, the U.K., Germany, France, Brazil, Colombia, China, Russia and Australia. In addition, KCP wanted to actively engage both regional and global teams to help capture emerging global insights and country differences in a timely and cost-effective manner.

Quite a lot of time was spent considering the best and most cost-effective method of conducting the research. Regardless of the method, this would be a large-scale project. Among the potential solutions SKIM considered were a quantitative survey of all 10 countries; in-depth interviews and focus groups in each country; separate quantitative surveys for each country and online qualitative message boards. Ultimately, SKIM settled on a recommendation of online qualitative message boards.

An online message board is an online controlled-access environment



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where like-minded people are brought together for a period of time to discuss a certain topic with help of a moderator. Boards are a hybrid of one-on-one and focus groups in that one can determine whether participants' responses to each question are visible to other participants. Moderators post questions and exercises that participants respond to. As with more traditional methods, the moderator can post follow-up questions or probe responses in-depth.

Balancing a global view

For multinational companies like KCP, message boards can be an excellent tool for balancing a global view with the country-by-country insights necessary to develop and market products and solutions effectively. More specifically for KCP:

- Global online qualitative research gives stakeholders in all participating countries immediate access to what local respondents are saying and enables country affiliates and regional teams to see their customers up close and to offer input as the research occurs.
- The ability to probe more deeply for information on a similar question in a variety of cultures at the same time can provide important insights for global teams, as well as compressing the time needed to understand an issue with implications across multiple markets.
- Using online boards let KCP have a separate board for each country, in the local language with a native-language moderator. This allowed country teams to monitor their board and to have direct input into the follow up questions.

Many different time zones

The initial kickoff meeting highlighted some of the challenges the research team would face throughout the project. With KCP researchers, internal clients and SKIM researchers in six different countries and many different

time zones on the call, communication and coordination logistics would be a challenge.

The team decided early on to have a separate board for each country with a native-language moderator for each board. That turned out to be very important for respondent and internal team involvement. Separate boards enabled regional and global teams to participate in the research in real time, leading to better buy-in and better idea and insight generation.

There were 10 boards: one per country, 120 respondents in total, and seven languages. Each board lasted two weeks, so researchers gathered longitudinal as well as point-in-time information, with moderators probing daily for both country-specific information and globally-important issues. Respondents also participated in a series of creative exercises to help uncover awareness and needs in the category. New exercises were posted every two days.

The project yielded more than 7,200 pages of transcripts and because the boards were conducted in the native language of each country, at least 60 percent of the transcripts were not in English. Also, there was a large internal global team of stakeholders, including affiliates from each country, to engage and manage. One of the tools used to help with this process was a parallel internal KCP online message board moderated by KCP personnel for use by the country and global KCP team members.

As one might expect, there were challenges! And they can be grouped into five categories: time; recruiting; expectations; content and engagement; and reporting and insights.

Time is not always on your side! A global study can have significant time-zone challenges. Because of the range of time zones, feedback is occurring around the clock and respondents, moderators and clients are all accessing the boards at different times. From a fieldwork standpoint, it was very useful to have a research partner with global offices to coordinate recruitment agencies and with the team across time zones.

The feedback and requests for moderator follow-up from internal KCP stakeholders was arriving at all hours and there were instances where it was challenging for the KCP global team and SKIM to quickly follow up on new probing requests.

Recruiting varies tremendously across cultures. One thing became very clear during the recruiting phase: How and when recruiting occurs and the degree of effort and length of time needed varies tremendously by country and culture. While it was important that most of the

screening criteria were consistent across countries, it was also still important to customize the approach in each market. For instance, in some countries, commuting issues were almost non-existent while in others, commuting issues were a huge part of the day and affected the respondent view of their work life.

Cultural differences can have a big impact on recruiting timelines and speed of participation. For instance, some countries like Colombia and Brazil take longer to recruit and the respondents are slower to get started on the boards. Researchers were initially very worried about having enough participants and participation in these countries. Researchers spent a lot of time on the phone and corresponding with panel providers, each of whom provided reassurance and came through in the end. Later there was concern that respondents in Colombia and Brazil were not participating at the same level as other countries but again, the process required patience. The key takeaway was to remain flexible regarding recruiting times and also about when questions and exercises occur for each country.

Over-recruit ... sometimes. This varied tremendously by country. For example, in China there was 100 percent participation but in Brazil, 50 percent of respondents were lost, requiring a new round of recruiting. In fact, for some countries, we recommend a custom recruit instead of a panel because there are instances when the panels simply cannot deliver.

Another very important consideration for recruiting is the language of the study and the cultural implications of language choice. In some cases, it is not smart to conduct a board in English, even if English is a widely-used second language. For instance, Chinese respondents in Hong Kong did not want to participate if English was to be used, even though they spoke and read English. They were concerned they would make a mistake and be embarrassed.

Set expectations – and be prepared to reset them. With any study it is important to manage stakeholders' expectations. In a multicountry study with wildly different markets across the world it is even more crucial. Multicountry studies also reveal dramatic differences in how cultures interact with the online bulletin board formats. Those differences

Best practices in global online qualitative

For involving respondents

- Using a variety of exercises will keep respondents engaged. Using max-diff exercises also generated a lot of interest among respondents and stakeholders.
- Moderators must be very engaged with respondents.

For managing and engaging a global client team

- Set up an internal client communication process. For KCP that meant regular debriefs and an internal online board where those involved could comment on trends and ideas they were seeing on the boards and bounce ideas off each other.
- A great kickoff helps stakeholder buy-in and creates enthusiasm; it also sets expectations.
- The internal project leader must be committed to keeping stakeholders informed and engaged. This takes a lot of work and is a critical success factor.

For vendor team management

- Communicate, communicate, communicate.
- Have lots of moderator debrief meetings! This project included two formal debrief meetings each week and multiple country-level conversations.

For managing communication, findings and daily output

- Create a schedule for delivering information to the team.
- Create a structure for managing the flow of information from the field and to the team.

For key recruiting and technical considerations

- When recruiting, do not rely on “one size fits all.” It doesn't.
- Conduct boards in the native language to ensure fewer cultural missteps and misunderstandings and to gather richer information.

can affect timing, content, interactions and willingness to provide visual content. Involving local teams can help manage those expectations.

For online boards that last more than a couple of days, there is a continuing risk of client and vendor staff burnout and overstimulation. Boards can be addictive and it is not uncommon to see clients and moderators accessing the boards continuously, day and night. Respondents can also burn out. Therefore, it is important to limit the discussion guide to essential questions because there's no limit to what each respondent can write (unlike with other methods) and many respondents will spend much more time on the boards than is required.

Managing expectations to avoid scope creep is also a challenge of being en-

gaged with respondents for two weeks. Ensure the internal team is aligned on all objectives and continuously remind them of the objectives in order to prevent scope creep. Even the slightest increase in scope means that data volume and analysis can balloon exponentially because of the number of respondents.

Content and engagement should be customized for culture and language. In developing global exercises and questions, local considerations must still prevail. Will all exercises will work in all countries? Chances are the answer is no.

With any online methodology, because it is not face-to-face, engaging respondents requires additional effort, coming up with creative exercises and varying the type of responses. For instance, researchers programed small max-diff exercises into the online boards,

which respondents really liked. They were fun, easy to answer and interesting to think about. Max-diff exercises are also useful because they are less affected by cultural/country variations so one can use the results comparatively and as a rollup across regions and globally.

SKIM designed five main, global exercises to understand behavior and needs in the workplace. Even these five exercises had to be adjusted for culture and language. Different countries and cultures adhere to different social and work behavior norms. For example, some are more willing than others to upload personal pictures and videos. Researchers found that in Brazil and Colombia there was a great reluctance to upload videos. Conversely, Chinese respondents were more than willing to upload pictures, videos and elaborate drawings. In addition, working hours varied a lot; one of the advantages of boards is that respondents choose when to interact, reducing the impact of split days (taking a two- or three-hour break midday), which are common in some countries.

Analysis and reporting planning must start before the research begins. By the end of the study, there were more than 7,200 pages of transcripts, pictures and videos. Don't wait until the end of the study to start analysis! There is too much information and it is impossible to synthesize and deliver a report in a reasonable time frame.

Online research also enabled researchers to ask for and receive multimedia responses. So, besides yielding pages and pages of written information, respondents uploaded a lot of great images – photos they'd taken themselves, pictures representing their thoughts that they found online – that offered a window into their worlds and thoughts. This really helped the team visualize what the respondents were saying. Again, having individual board moderators helped manage the flow of multimedia responses.

A number of steps were taken at the beginning to manage the information flow. SKIM received daily summary moderator reports from each board in a predefined format, in English to help manage the information flow and to prepare for the reporting phase. These summary reports became essential to managing the volume of information. Dossiers of the resulting information were created for each country, and

eventually these dossiers were used to create thumbnail sketches called personas to help synthesize the massive amount of information.

Brainstorming workshop

As a final step for internalizing and articulating the insights from this study, the team participated in a two-day brainstorming workshop with global, regional and country-level team members to immediately make the research results actionable. Teams were created for the workshop and each team was tasked with articulating a country's point of view.

The ability to really understand the consumer is invaluable in brainstorming new product and service ideas. During the brainstorming session, the different personas that were created in the reporting and analysis phase were used to aid and stimulate stakeholders in brainstorming new potential white spaces and product ideas.

Spontaneously thanked

Even though researchers and many clients have seen lots of online qualita-

tive, there are still many consumers and decision-makers who have not yet participated in something like this. (In our case, after spending two weeks on the online bulletin board, participants spontaneously thanked the moderators for the experience.) So there is clearly room for growth in the number and the types of projects that can be undertaken using it.

For researchers who are considering conducting global online qualitative boards, take our experiences to heart and remember that communication, coordination and the efficient managing of information and respondent and stakeholder engagement will help you achieve research success. ①

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How to optimize global qualitative research

There are many questions to ask before the questioning begins

| By Andrew D. Cutler

snapshot

The value of good communication reigns supreme among the many factors, detailed here by author Andrew Cutler, that contribute to effective international qualitative research.

Global qualitative research is not for the faint of heart. Unlike conducting focus groups or one-on-one interviews in a handful of U.S. cities, conducting research abroad requires a heightened sensitivity to the nuances and unique challenges that await. Experienced researchers know that it is crucially important to follow certain rules if a global qual project is to be successful. What follows is a summary of many, but by no means all, of the steps that will help to ensure that your qualitative research has a successful outcome on the global stage.

Allow plenty of time for each step in the project. While rushing market research projects is never a good idea, it is especially important to allot sufficient time when you are dealing with the complexities of a global qual project. Case in point: the process of approving study materials. For each document, you need more than just approval of the English-language version of the document.



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Chances are, your client's partners in the local markets will want to review it and provide input. A product profile, for example, may have specific nuances that apply only to certain markets. With many stakeholders involved, reaching consensus on the exact wording of each document may take weeks; there may be internal disagreements at your client's firm as to what the precise wording should be. Once all of this is sorted out and the translated versions arrive, the process begins again, with approval needed from your direct client as well as his/her colleagues in the local market. If any of the stakeholders ask for changes to the translated documents, this of course adds further time to the process, as the translations then need to be implemented and approved by all parties.

Work with reliable recruiting partners. There are a lot of recruiting agencies out there that claim to be experts at finding respondents for global qual research. The safest approach is to work with recruiting partners whom you know from

personal experience to be excellent. If you don't have these kinds of relationships, you need to ask some tough questions of any company that you are considering for the recruit: How do you find potential respondents? What channels do you use? In which countries do you have "troops on the ground"? For each country, how long have you had a presence in that country? What types of audiences are you recruiting most often? How large are your databases of each respondent type, by country? What steps do you take if you run out of people to contact from your database?

Work with experienced moderators. For overseas research, when moderators who speak the local language are needed, it is vital to select those who are truly excellent at what they do. But how do you find the best of the best? Again, the recommended approach is to select moderators whom you have found to be outstanding in prior research projects. If you don't have firsthand experience with any moderators in a specific market, or

if those with whom you have worked have been less than impressive, then compile a set of possible candidates who are recommended by colleagues in that market. Study their CVs carefully, paying particular attention to the number of years they've been moderating and the level of experience they have in the relevant industries you are researching. To assess their intellectual acumen, talk with them on the phone and obtain (blinded) writing samples. And ask for references from other clients with whom they have worked. Keep in mind, too, that it is preferable to work with moderators who are fluent in English (as well as their local language) so that you and the moderator can freely communicate about the research at every stage of the process.

Conduct the interviews in local languages. Occasionally, for research in a market where English is not the first language, clients will ask if it is possible to just recruit participants who happen to be fluent in English and thereby enable the in-

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interviews to be conducted in English. Unfortunately, as enticing as this approach may sound, it is not advisable, for a number of reasons.

First, being “fluent” in English is a subjective matter and someone whom the recruiters consider fluent may not be fluent in the eyes (and ears) of others involved in the project, such as yourself and the end client. Attempting to conduct an English-language interview with someone who has little grasp of English can provide little meaningful feedback (at best) and may lead to miscommunications that actually distort what the respondent is trying to say.

Second, finding participants who do speak English is likely to be challenging, especially in countries that de-emphasize English as a second language, and will slow or even halt the recruiting process. You do not want to be in a position where the recruiters say “I’m sorry, but we have reached out to all the eye surgeons in Italy and only have found two who are (a) fluent in English and (b) willing to participate in the research.”

Third, even if the recruiters are able to find a large enough sample of English-speakers, limiting the research to English-speakers inevitably reduces the degree to which the respondent sample represents the larger universe from which you are drawing.

Attend the research. In an attempt to save money, and particularly with the advent of videostreaming technology, it may be tempting to consider monitoring the research from the comfort of your home office in the United States. Resist this temptation! If your research is to go off without a hitch, you (or a colleague) need to attend in-person. What if the videostreaming doesn’t work properly? What if respondents are late or don’t show up at all? What if someone from your client’s organization decides to attend at the last minute? What if the moderator, despite your careful coaching, has a question or problem in the middle of an interview? In any of these circumstances, your physical presence at the research can make a big difference.

Talk to the moderators before the research begins. Preparation is the primary ingredient in a successful research project. I like to prepare by placing myself, mentally speaking, in my client’s shoes and asking myself: What are my key objectives? What are my challenges? Who is my competition? What issues am I facing? What questions do I need answers to? What else do I want to explore? What will I be doing with the research findings? How can marketing research help me?

Asking questions like these forces me, the researcher/moderator, to truly see things through the eyes of my client. If you internalize your client’s situation, you will inevitably create research tools that will directly address your client’s needs. Not only that, when you meet with the ex-U.S. moderators you will be able to convey to them exactly what the objectives are and thoroughly inculcate them on the specific areas on inquiry. Note that you should meet with each of the moderators at least two – and ideally three – times



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before the fieldwork: One meeting alone will not provide the reinforcement necessary for the moderator to internalize the project objectives.

Talk to the moderators during the research. While you are watching ex-U.S. research, it can be tempting to assume that the simultaneous translator is capturing exactly what the respondent (and the moderator) are saying. Resist this temptation. Because of the challenges of real-time translation, even a top-notch simultaneous translator will only be able to capture a portion of what is actually being said in the interview. And the non-verbal components of the interview, such as the respondent's tone of voice and the modulations in volume and intensity, are even harder to capture.

For all of these reasons, it is vital that you talk with the moderator for regular debriefs throughout the day of research. Make it a habit to spend three-to-four minutes with the moderator after each interview for a download. You may be surprised at how much additional information

you capture by doing this. If nothing else, having these systematic debriefs and dialogues will strengthen your grasp of the research findings and will likely enable you to pick up patterns in the responses that you might otherwise have missed.

Talk to the moderators after the research is over. Just as it is vital to talk with the ex-U.S. moderators throughout the day of research, it is equally important to hold debriefs with them at the conclusion of the fieldwork in that market. It is at this point that the findings from the research in the market can be synthesized and the person who was literally closest to the respondents – the moderator – is best equipped to do this. Set aside an hour for this debriefing session, during which time you and the moderator (and the simultaneous translator, if they are available) can talk undisturbed and uninterrupted. Make certain that you go through all the questions in the discussion guide. Ask the moderator to provide his or her thoughts on the patterns

and variances that emerged over the course of the research in that market. Pay attention to commonalities and to differences in how you and the moderator assess the research findings and challenge the moderator if s/he has perspectives that differ from yours, keeping in mind that s/he was the one who actually conducted the interviews and heard the respondents firsthand.

Get transcriptions. English-language transcripts are expensive – very expensive. But they are worth it. By communicating to you and your client, word-for-word, exactly what was said in each interview, transcriptions can provide invaluable insights into the research content. Keep in mind that translating is arduous work, mentally. The brain has to process two languages almost simultaneously. A simultaneous translator has to verbalize the translations instantly, while at the same time listening to the next snippet of conversation. This is enormously taxing work and, given the pressures of real-time translation, even the best simultaneous translators cannot translate every single question-and-answer with 100 percent accuracy. Thus, what the simultaneous translator says should be seen as merely a rough draft of the actual interview content.

A transcriptionist, on the other hand, has the luxury of time to get the translation right: time to pause the recording and decide on the best way to translate a word or phrase; time to look a word up in the dictionary if it (or its translation) is unfamiliar or unknown; time to correct any errors in his/her translation that become evident before the transcript is issued; and, most importantly, time to take breaks in between chunks of translation.

Besides providing an accurate encapsulation of the interview content, transcripts also benefit you in other ways. Including quotations from the interviews adds considerable depth to the reports that you write and, for the aforementioned reasons, you should not quote what the simultaneous translator said. Transcripts provide a clean record, for posterity, of every interview's content, in English.



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And, if you or your client wish to delve further into what specific respondents said, it is much faster and more efficient to use transcripts than audio recordings for this purpose. All this being said, if your client's budget simply does not allow for transcripts of every interview, then post-fieldwork you should choose the interviews that you and the moderator feel were the most insightful and obtain transcripts of those.


Hire the best darn simultaneous translators you can find. The value of simultaneous translators is sorely underestimated by much of the market research community. Keep in mind that, for the research in each ex-U.S. country, you and your client are probably going to be listening to the simultaneous translator throughout the course of the interviews. If the translator is hard to understand or has difficulty keeping up with the interviews, you and your client are going to derive very little value from the research, at least until you get the transcripts of the actual interviews. The solu-

tion, again, is to select simultaneous translators whom you have found to be outstanding in prior research projects. If you do not have experience with translators in that market or have not had positive experiences with the translators you've used so far, then you should conduct a careful screening of the translators who are available and recommended by colleagues in that market.

Just as with the moderators, study the translators' CVs to assess the number of years they've worked in their field and the level of experience they have in the relevant industries. Talk with the translators on the phone and ask for references from other clients with whom they have worked. In my experience, the most useful simultaneous translators are those whose first language is English but who have lived abroad for years and thus have become highly conversant in the native language. When such translators translate what the interviewer and interviewee are saying, it is almost as if you are watching the interview in English.

One more tip: Brief the simultaneous translator(s) thoroughly on the interview purpose and content, including every question in the discussion guide, before the research begins, and make sure they understand any technical terms that may arise during the interviews.

Come prepared

Global research is a complex and tricky undertaking but if you come prepared with the right strategies and tactics, you will emerge with a bevy of insights that are both meaningful and accurate and that capture the commonalities and differences in the perspectives of respondents from different parts of the world. This knowledge will make you invaluable in the eyes of your client, as the insights you bring will ultimately provide solutions to their global marketing issues and challenges. 

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Mr. Mohit Gour has been with Issues and Answers for 17 years, serving as Director, International Field Services for the past 10 years. Mr. Gour has an MBA from Philadelphia College, is currently a member of ESOMAR and serves on the board of The MSMR Program. Mr. Gour speaks Hindi and 2 other Indian regional languages fluently. Mohit is ready to serve all of your research needs at a moment's notice.



International Internship/Mentoring Program

Peter McGuinness, I&A President, has served on the Board of Directors at the University of Missouri for many years. As a result, Issues and Answers has proudly sponsored many international students. (Some have even become full time team members!) We are proud to introduce you to Lingyuan Zhang. "Ling", as she is affectionately known, hails from Beijing, China, where she received her Bachelor's Degree from the Beijing Institute of Fashion Technology. This spring she earned her Masters from the University of Missouri, Columbia.



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A moving target

Tips for effective mobile surveying

| By Adam Berman



snapshot

From question types to invitation strategies, this article offers guidelines for successful surveying via mobile devices.

The proliferation of smart, Web-ready mobile devices continues unabated and for many consumers these machines are replacing their desktop and laptop computers, which, until recently, were the primary means to collect online survey data. In 2011 the percentage of surveys being taken on mobile devices was less than 2 percent. However, within the last year, the U.S. and other nations have experienced a major shift to a more mobile-centric culture.

With this prolific adoption of mobile devices, our firm is now seeing 25-30 percent of its online surveys being completed on mobile devices vs. desktop and laptop computers. Coupled with the accelerated use of mobile devices to access e-mail, with 36 percent of all e-mails in the U.S. being opened on mobile devices (Knotice, Sept. 2012), a mobile data collection strategy must be at the forefront of consideration when conducting online research.

For data collection within the U.S., consideration for feature phones (or non-smart Web-enabled devices) is not crucial because of dropping market share and consumer behavior differences. In the U.S., those with non-smart Internet-accessible phones don't tend to surf the Web or make purchases on their feature phones as compared to modern smartphones.

Because international smartphone adoption over feature phones has not been as rapid in many parts of the world due to cultural (Internet-accessible feature phones are popular) and economic differences, surveys being conducted abroad require special consideration and programming to allow feature phones to take online mobile surveys.

In other words, it's more important to make the survey accessible to a feature phone in other parts of the world compared to North America and Europe. While there is a continued trend toward smartphone adoption internationally, in regions of the world such as Asia-Pacific and Latin America for example, the ownership and usage including Internet surfing and online purchasing of feature phones exceed that of smartphones and tablets. In these regions and most parts of the world with the exception of Europe and North America, consumers surf the Internet on full-featured phones.

Mobile devices are continuing to evolve rapidly, as is the technology available for conduct-



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ing surveys on these devices and the behavior of those using them. As a result, any overview of best practices is a constantly moving target. Nevertheless, assembling a list of best practices is still a worthwhile endeavor.

Number of questions and survey length

A couple of years ago, CatalystMR was advising its clients that five to seven minutes was a pretty firm ceiling for mobile survey length and should not be exceeded. However, tolerance of longer surveys is increasing as devices continue to improve and respondents use these devices more frequently. In fact, for many people, mobile is a preferred platform to communicate rather than a desktop. Additionally, respondents recognize and accept that mobile devices have less screen space to work with than desktop and laptop computers. Our current recommendation for top-end survey length on mobile devices is roughly the same as our recommendation for desktop-only surveys: 20 minutes or less, with an ideal of 10-15 minutes or less for mobile devices, especially smartphones.

With survey lengths exceeding 20 minutes, we see a drop-off of respondents completing the survey, regardless of device type. With that said, always remember: The shorter the better. You need to take into consideration the respondent's relationship with the brand, the customer's expectations, the marketing effect of the survey, the incentive amount, panel vs. non panel and other factors that might lead you to conduct a very brief survey, perhaps only five to 15 simple questions.

Respondents using tablets are more tolerant of longer surveys than those taking surveys on smartphones, primarily due to the need to scroll more on a smaller screen and general fatigue. Those taking a survey on a feature phone are less tolerant than smartphone users for similar reasons. For the purposes of feature-phone users, these respondents should be given a scaled-down version of the survey to lessen respondent fatigue and to mitigate the dropout rate.

With all this in mind, it should still be expected that a mobile survey will experience a higher dropout or abandonment rate than that of a desktop

survey. However, survey results trend the same whether online or via mobile. With few exceptions, such as surveys that require a large viewing screen (i.e., conjoint studies, large or complex grid presentations, etc.), we have found that survey results are not affected by the platform used to take the survey.

When to scale down the questions asked in mobile vs. desktop

If your survey exceeds 15 minutes, consider limiting the number of questions asked on mobile devices. To avoid respondent fatigue and higher than necessary dropout rates on these devices, think about asking up to 10 minutes of questions as the core of your research. For example, if you have a battery of questions asking respondents to rate their satisfaction on 15 items, consider asking the most important 10 items to smartphone users. Or perhaps rotate blocks of attributes so that all attributes are rated by a subset of respondents.

Survey design: question types, setup and logic

Scale questions should be limited to five points or seven points at most. Ten-point scale questions take up too much screen real estate and therefore require scrolling left/right or pinching a mobile screen's viewable area so small that the screen presentation causes the question to be difficult to manage. With that said, if you have established a 10-point scale as a scale norm previously, not to worry. Ten-point scales do fit to screen ultimately; the scale presentation is just smaller if the respondent pinches the screen to see the entire scale question.

More on scale questions: Try to limit the amount of text on each attribute. Overly wordy attribute text takes up more valuable screen real estate and increases the need for scrolling.

Ranking questions are fully functional on smartphones and tablet devices, however on feature phones, ranking questions require a different programming setup. Once again, just keep in mind that overly wordy text or too many items to rank can make the page too complex visually for smaller screen sizes. On smartphones, always consider that longer questions will require vertical

scrolling, which makes those questions more difficult to navigate.

Other question types including numeric, radio (single-response), checkbox (multiple response), text and pull-down work perfectly on smartphones and tablets.

To minimize scrolling, the best practice is to program **one question per screen**, except in some rare cases where wording and a short response list allow for two questions.

Survey logic: Any survey logic available in an online survey is similarly available in a mobile survey whether the logic is complex skip or rotate patterns; quota or segmentation algorithms; data piping or rich content presentation, etc.

One survey engine – platform-agnostic: The same survey that runs on a desktop runs on a mobile Web-enabled mobile device because the survey engine is the same. In our firm's case, because the survey engine is the same and CatalystMR tracks user agent data such as device type, user agent data can drive survey logic. This means that you have the ability to customize survey logic based on the device accessing the survey.

Device information

Our survey system, for example, captures many data points automatically from the user's device. We can report this data back in an easily understood format.

Here is the information we collect from device capture recording: device type – desktop, mobile (smartphone/tablet v. feature phone); device make – Apple, Motorola, Samsung, etc.; device model – iPhone, BlackBerry and other models (though currently in about 3-4 percent of the cases, devices don't pass this information along); browser – Chrome, Internet Explorer, Safari, etc.; browser version.

Survey introduction (including pop-up invitations)

Special consideration needs to be paid to the introduction and invitation text for your survey. Consider the following to improve the traffic to your survey:

- Make the invitation engaging. Keep in mind where the respondent will be when they receive the invitation.

Are they sent an invite via e-mail or is the invitation presented to them on-screen while viewing a Web page? Will they be invited via store signage, a receipt, a postcard, a proprietary mobile app or short-code text messaging? For pop-up invitations coming from a Web site, tie the look and feel of that site into the invite (use similar colors, font, etc.) so it feels like a part of the site they're visiting. Always try to reinforce the brand when possible.

- Graphically-rich e-mails are not considered spam anymore. There was a time when we recommended to our clients that we send a text-based e-mail so that the invitation doesn't appear as spam to the prospective respondent or to e-mail spam filters. Since spam fatigue has largely disappeared due to spam filtering technology, participation rates increase with graphically-rich branded e-mail invitations.
- Keep the invitation text short, clear and compelling. The invitation will only have the viewer's attention for a few seconds, so make the words you use count. Be sure to convey the sense that customer or site visitors' opinions matter and that the feedback they provide can influence the development of new and existing products and services. Be informative and honest about the survey length and let the respondents know about any incentives being offered, if applicable. If it's a 10-minute survey and the invitation tries to draw respondents in by stating a five-minute survey length, respondents are more likely to drop out or give more negative responses because they will feel misled.
- If the survey invitations are only being sent to a specified group, let the respondent know this. This can convey the idea that the respondent has a special opportunity to give feedback.

Other information/considerations

- Web site pop-up invitations: Utilize site-wide pop-up survey invitation code across a given site. Pop-up invitations have proven to be very effective in generating traffic for Web site evaluation surveys, etc.
- Media campaign-generated traffic:


Are you or your client doing a media campaign to drive traffic to you or your client's site? Pre- and post-surveys are a great way to measure media/ad campaign effectiveness. If there's a media campaign running or upcoming, help establish a baseline prior to its launch. Then run the survey again to measure increased traffic, satisfaction, purchases, etc., depending on what the research is designed to measure.

- Text-back messaging (for example, Text "my survey" to 41411 on your mobile phone and you'll receive an invitation via text to a CatalystMR demo mobile survey): This can be especially effective for invitations where you're looking to draw in a large audience at an event (sporting event, conference, etc.) or store location, point-of-purchase, etc.
- QR codes: Custom QR codes that link to a mobile survey help drive traffic and require little effort of the respondent. QR codes can carry data within them that can aid the research, drive survey logic and customize the survey experience. For example, QR codes can contain data like a store number and purchase information to track where respondents are coming from. QR codes can also reinforce your client's brand by putting a logo or other image within the QR code itself.

What to ask when conducting Web site intercept surveys

Understanding the research objective is critical to guiding your mobile survey data collection. Here are some things to understand:

1. What are the site traffic statistics?
2. What does the traffic to the site look like? How many site visits to the site per month? What percentage of them are new? How much time do visitors spend on the site and on what specific pages of the site? What pages are the most visited pages?
3. How many unique visitors per month vs. return visitors?
4. What reason(s) do visitors have for visiting the mobile site? Are they looking for general or specific information, to make a purchase or because they're excited about a new product offering?

As mobile continues its rapid growth, the list of best practices will no doubt evolve to meet changing technological capabilities and respondent habits and preferences. Please feel free to reach out to us with your own ideas or insights on how the industry can work together to advance this very important research methodology. 

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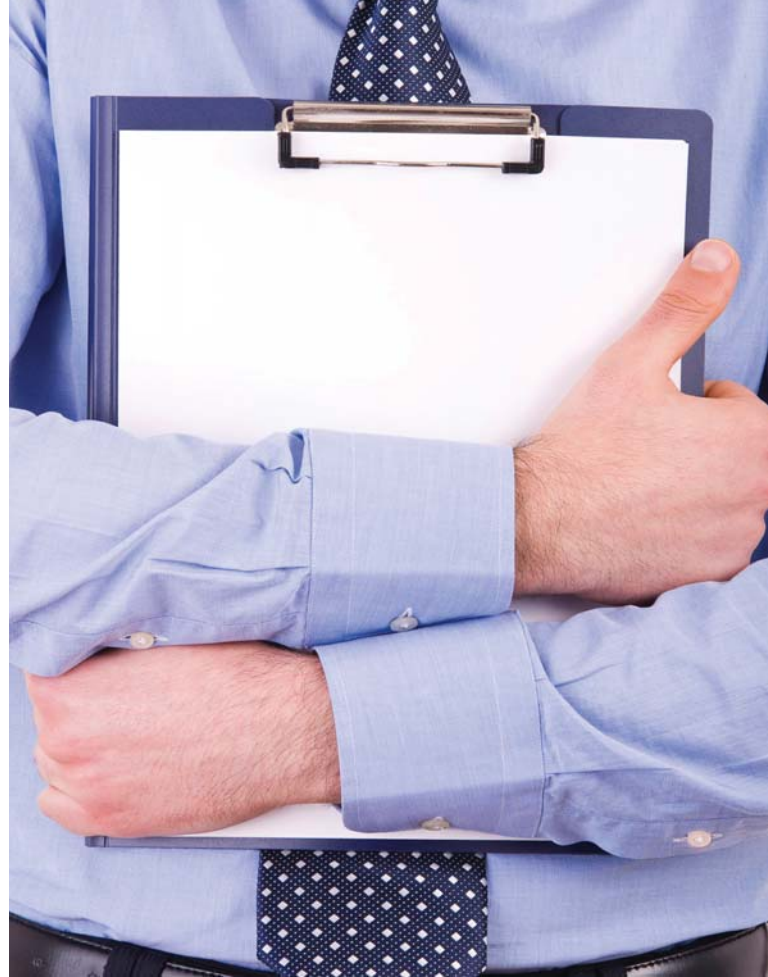
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When fake brands are used to get real data

Were respondents lying or trying not to look stupid?

| By Peter Gold



snapshot

Peter Gold reports on a research-on-research project that examined the impact on data quality of including bogus brand names in survey response lists.

The last 10 to 15 years have seen many new developments in marketing research. Neuroscience, mobile surveys, location-based research, big data, social media, survey gamification, DIY and Google consumer surveys each have garnered the attention, the imagination and even sometimes the disdain of the research community. Having something new and shiny is fun and it gives researchers something to shout about. And, as researchers are notoriously weak as marketers and self-promoters, new technology also gives them the wedge they need to get their foot in the door with clients.

Capabilities presentations that focus on the mundane practices that lead to solid, reliable research are the surest way to lose an audience. Our own data quality slides at VeraQuest were first demoted from top billing to back-of-the-deck fodder, before eventually and ignominiously being relegated to “hidden slide” status. The last time I presented slides on data quality and quality control, the lead client in the meeting said “You can skip this section – we assume you understand how to do this stuff.”

The truth is that most end users are just not that interested in the details that drive quality. And who’s to blame them? Today’s client-side researchers not only are expected to be experts across a myriad of research disciplines but are also expected to be business analysts. Most are swamped with the demands of internal clients, so it’s completely understandable if they don’t have the time nor inclination to do their suppliers’ jobs as well. They have a reasonable expectation that their suppliers will get it right.

The problem, however, is that many smaller research companies lack the know-how when it comes to implementing data quality procedures or they don’t have the financial backing to underwrite the cost. Larger research institutions, on the other hand, which may have the wherewithal to implement standard data quality processes, are frequently beholden to stakeholders other than clients. Resources slated for data quality initiatives simply become costs to cut when cutting becomes necessary. There is little incentive –



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and in some cases there is a disincentive – on the part of suppliers (large and small) to provide appropriate levels of quality control when clients don't demand it. Until something blows up and then the cost becomes enormous.

Our firm's interest in adding questions to surveys in order to identify fraudulent respondents began while we were working with Allan Hauptfeld at Vantage Research + Consulting Inc. on a project for a West Coast bakery. The bakery was interested in obtaining a national read on awareness for its brand in what is a highly fragmented category. The study, which contained just a few questions, consisted of defining the bakery section of the supermarket and then delving into awareness for the client's brand along with seven regional competitors.

Having some experience working with low-penetration brands, we suggested incorporating two fictitious (ghost) brands as a means of establishing a baseline for "noise." We believe there will always be some percentage of respondents, perhaps 1 percent to 3 percent, who think they've heard of a brand even when the brand doesn't exist. In other words, they're honestly mistaken. It happens. However, because even low levels of noise can have a profound impact when trying to analyze results on brands such as the artisan bread client and its regional competitors, it's advisable to account for noise.

The results from the bakery study, however, were not what we had anticipated. Awareness for the client brand came back much higher than expected. We had figured awareness for the brand would be somewhere in the neighborhood of 6 percent to 9 percent but it came in at 16 percent. Moreover, several other brands we thought would be in the low-to-mid single-digits were in the 11 percent to 13 percent awareness range. The biggest red flag, however, was that the two fictitious brands had generated awareness levels of 9 percent and 12 percent. In other words, awareness of the fictitious brands was comparable to several of the real brands.

Deeply concerned about the accuracy of the data, we started to look for anything that could explain the

exaggerated levels of awareness. For example, we found that 3 percent of all respondents said they were aware of all 10 brands – the eight real brands and the two fictitious ones. These respondents were obviously straightlining the survey. If we left things there, we'd be admitting that noise could account for 6 percent to 9 percent of awareness – something we were not prepared to accept.

Not only were individual brand awareness levels higher than expected, but we also felt that relatively few respondents would be aware of more than one or maybe two brands. Yet, 11 percent of national respondents said they were aware of five or more of these artisan bread brands. If we actually eliminated all of these respondents from the data, most of the brands' results would line up with expectations. Unfortunately, even though we suspected that a portion of our respondents weren't answering the survey truthfully, aside from straightliners we had no real basis for throwing out respondents – we couldn't assume that those people claiming to be aware of the real brands weren't being truthful. We also didn't want to assume that those claiming awareness of one or both fictitious brands were fraudulent respondents.

Identify and eliminate

Based on the findings from this study and a few other studies we had conducted at the same time, we decided to embark on research of our own, with the intention of devising a plan that would allow us to identify and eliminate fraudulent responders from all our surveys. Straightliners, we believed, would be relatively easy to spot. Based on the artisan bread study, however, we felt the majority of fraudulent responders would be less obvious.

We acquired another learning through the bakery study, which we felt we could apply to our research-on-research. In the bakery study the brands were relatively small but they were real. As stated previously, the purpose of the study was to measure awareness of small bread brands among a national audience. We have to keep in mind that people

who live outside of a relevant brand region may have previously lived or travelled there. Therefore, we couldn't simply dismiss brand-aware respondents outside a market area as being fraudulent.

That said, asking about fictitious brands in our research seemed like a promising way to identify fraudulent respondents but we figured we would need more than just two of these ghost brands. We needed a list long enough that we could make confident judgments about who was being untruthful, so we generated fictitious brand lists within three categories – juice, chips and shampoo – and we came up with 30 brands in all, 10 per category. We were diligent about researching the names, as we didn't want our fictitious names to be similar to the names of real brands. We wanted them to be believable but it would only serve to undermine the study and our objectives if the fictitious names we created were easily confused with real ones.

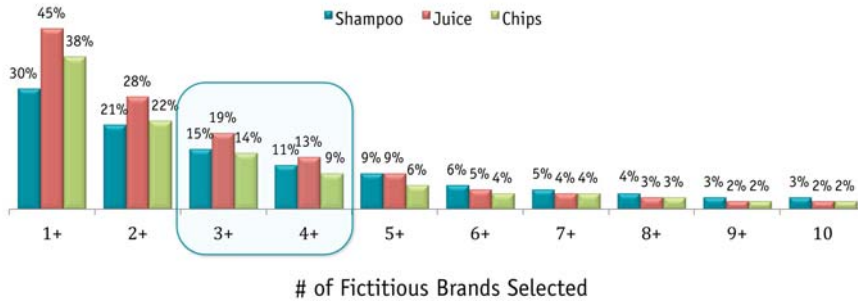
Because VeraQuest is a frequent provider of omnibus surveys, where typically there are multiple clients on each survey, it is a relatively simple task to unobtrusively embed additional questions between client sections. The multi-topic omnibus format also provides a sort of natural survey terrain in which to camouflage research-on-research questions.

Normally we provide a minimum of 1,500 respondents for our omnibus surveys and we typically obtain those respondents from a single sample provider. For this research, however, we utilized sample from two vendors. One of our objectives was to determine whether the fraudulent respondent issue we encountered in the bakery study was supplier-specific or whether it might be occurring in other panels too. It would have been ideal to assess a handful of other sample suppliers at the same time but doing so wasn't feasible. Moreover, we wanted to focus on our primary objective of devising a system that would allow us to identify and eliminate fraudulent responders. It's worth noting that neither sample provider knew we were conducting this test, as we did not want to jeopardize the integrity of the research.

Table 1

Sample Provider 1				Sample Provider 2			
Yes/No		Pick-List		Yes/No		Pick-List	
No Real Brands	Two Real Brands	No Real Brands	Two Real Brands	No Real Brands	Two Real Brands	No Real Brands	Two Real Brands

Figure 1: Awareness of Fictitious Brands



The objectives of the research were fourfold:

1. Is the problem provider-specific or is it happening elsewhere?
2. Could a list of fictitious brands help us to identify, and thus be able to exclude, fraudulent responders?
3. If so, would pick-list (multiple-choice) responses be preferable to yes/no grids in identifying fraudulent responders?
4. Does it make sense to add at least two real brands into the list of fraudulent brands?

In order to address all of our objectives, we used an eight-cell design (Table 1).

Note: The results we are about to show are from our main sample provider only. We never intended to analyze aggregated data because we needed the capacity to show results to each vendor. Aggregated data would have been useless as a diagnostic tool and sharing competitive data with each vendor would have constituted an egregious breach of trust.

Objective 1: Is the problem provider-specific or is it happening elsewhere?

Without going into great detail, we saw a problem in both data sources, with our primary provider being the less problematic of the two. Through use of the fictitious brand methodol-

ogy detailed in this article, we found that that both data sources showed evidence of fraudulent responding. In other words, both sample providers yielded sufficiently large numbers of respondents who selected several of the fictitious brands to suggest that

the issue was not isolated to one supplier. While vendor evaluation was an internal objective, it is not the goal here; hence, for the remainder of this article we are focusing exclusively on the sample from one sample source – our main sample provider.

Objective 2: Could a list of fictitious brands help us to identify, and thus be able to exclude, fraudulent responders?

As I alluded to earlier, we asked about brand awareness within three categories – juice, chips and shampoo. Keep in mind we were testing other variables as well; therefore, the awareness data are aggregated for cells that contain pick-list responses, yes/no responses, as well as lists that contained no real brands and lists that contained two real brands.

We focused our analysis on three data points: 1) those claiming awareness of all 10 fictitious brands, 2) those claiming awareness of three or more fictitious brands, and 3) those claiming awareness of four or more fictitious brands. The reason for our interest in these data points is that,



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Figure 2: Fictitious Brands Correlation, by Category

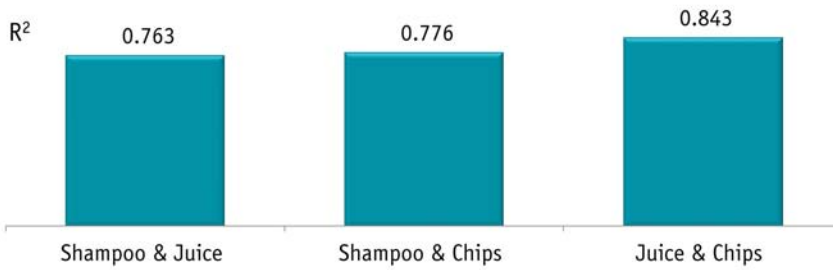


Table 2

Yes/No Grid vs. Pick-List						
Fictitious Brands	Yes/No Grid			Pick-List		
	Aware	Shampoo	Juice	Chips	Shampoo	Juice
10	4%	3%	3%	1%	1%	1%
9+	5%	3%	4%	1%	2%	1%
8+	6%	5%	4%	1%	1%	1%
7+	7%	5%	6%	2%	2%	1%
6+	8%	8%	7%	4%	2%	1%
5+	11%	13%	10%	6%	4%	3%
4+	14%	17%	13%	8%	8%	5%
3+	19%	23%	18%	12%	15%	9%
2+	23%	31%	25%	18%	25%	18%
1+	32%	48%	39%	28%	41%	37%
0+	100%	100%	100%	100%	100%	100%

first, selecting all 10 fictitious brands represents unabashed straightlining. Also, stated awareness of just one or two fictitious brands seemed like it could be the result of a plausible mistake, while stated awareness of four or more fictitious brands seemed much more likely to be the result of duplicity.

We found that 32 (or 3 percent) out of the 1,101 respondents for shampoo straightlined the responses, which was exactly what we saw in the bakery study. For both juice and chips, 2 percent were straightliners. We also found that between 9 percent and 13 percent of respondents reported being aware of four or more fictitious brands, while between 14 percent and 19 percent said they were aware of three or more fictitious brands (Figure 1).

We also wanted to understand whether respondents who exhibited fraudulent-type behavior in one category were likely to exhibit it in oth-

ers. It's logical that if false positives are purposeful rather than accidental, we would expect to see a strong correlation across categories. And in fact, we do see a very strong relationship between categories (Figure 2). The R² was .763 for shampoo and juice, .776 for shampoo and chips and .843 for juice and chips. Said another way, the number of fictitious brands a respondent chooses in one category is a very good predictor of how many they will choose in other categories.

It seems quite evident from the data that this approach – the use of fictitious brand lists or something comparable – could be an effective method of identifying fraudulent respondents. Where to actually draw the line as to what is an acceptable number of false-positives and what is not, however, is perhaps not so clear-cut. Using a zero-tolerance policy to eliminate respondents (i.e., deeming respondents who claim awareness of just one fictitious brand as fraudu-

lent) would be unrealistic. Even eliminating respondents who claim awareness of two fictitious brands seems too aggressive. As much as we want to be rid of fraudulent respondents, we don't want to go overboard and exclude good ones. At our firm, we currently use a proprietary algorithm that considers several factors. At the end of the day, however, it is something that each research firm and sample provider need to jointly agree upon.

Objective 3: Would pick-list (multiple-choice) responses be preferable to yes/no grids in identifying fraudulent respondents?

At this point, we have concluded that fictitious brand lists could be employed to help identify fraudulent respondents. The purpose of our next assessment is to determine if using response sets in the form of pick-lists are favorable to yes/no grids.

The data are very interesting in that the yes/no grid format appears to do a better job of capturing fraudulent responders than does the pick-list format. (You can see in Table 2 that the numbers on the left side of the table are considerably higher than those on the right.) However, we don't know if the numbers are higher because the yes/no grid format is more effective at detecting them or if it's because the yes/no grid actually encourages fraudulent survey behavior.

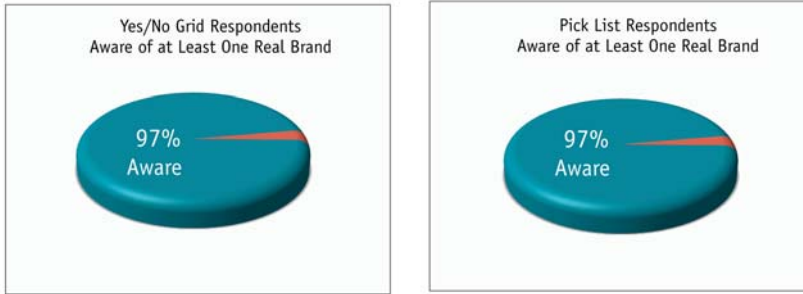
Additionally, the fact remains that respondents can cheat more or less undetected in the pick-list format because all they need to do is not answer. It's what we might refer to as "the sin of omission." So we still have a quandary. Or do we?

If respondents with the pick-list format are, in fact, more prone to cheating by simply omitting responses, then they should also be selecting real brands (when real brands are available) at a lower rate than those respondents who fall into the yes/no grid format. In other words, if these respondents are cheating by essentially not selecting anything, then they shouldn't be selecting real brands either.

However, as shown in the two pie charts in Figure 3, there is no difference between the two formats in terms of the percentage of respondents who claim awareness of a real

Figure 3: Respondents Aware of at Least One Real Brand

Yes/No vs. Pick List



one or more brands they've never heard of so as not to appear "stupid" or "out of touch." One might be inclined to remove these respondents from the data since they claimed awareness of fictitious brands, when in fact he or she would have provided perfectly good data had they not been made to feel "stupid" by the purely fictitious brand list. Again, we don't want to needlessly exclude respondents who might otherwise provide perfectly valid results.

High level of diligence

As researchers who have been on the forefront of online research since the late '90s, we firmly ascribe to the philosophy that sample quality cannot and should not be the sole responsibility of sample providers. We do expect there should be a high level of diligence to keep bad respondents out of our sample. However, some percentage of these bad respondents will make it through anyway. And even if sample providers do a perfect job keeping out the bad guys, some respondents may go bad over time. Moreover, some respondents may have the best of intentions but poorly-constructed surveys may confuse and frustrate them. One way for annoyed respondents to exact revenge on researchers is by being inattentive and even possibly malicious.

Therefore, when it comes to ensuring respondent accuracy, it is the responsibility of the researcher to provide another layer of security – to identify and deal with bad respondents who may have penetrated the sample provider's defenses or previously-good respondents who went bad over time.

We believe that surveys themselves should include measures to help guard against fraudulent respondents. Unfortunately, there are practical limitations on what sample providers can do within the framework of a survey, since they don't always have the latitude to alter a questionnaire. Therefore, it's incumbent upon the client-facing researcher to implement those measures necessary to ensure the highest-quality data. ⑩

Peter M. Gold is chief executive officer of VeraQuest, an Armonk, N.Y., research firm. He can be reached at peter.gold@veraquestresearch.com.

Table 3

No Real Brands vs. 2 Real Brands						
Fictitious Brands Aware	10 Fictitious/No Real Brands			10 Fictitious/2 Real Brands		
	Shampoo	Juice	Chips	Shampoo	Juice	Chips
10	4%	2%	2%	2%	2%	1%
9+	4%	3%	3%	2%	2%	1%
8+	5%	4%	4%	3%	2%	2%
7+	6%	4%	5%	4%	3%	2%
6+	8%	6%	6%	5%	5%	3%
5+	11%	9%	8%	6%	8%	5%
4+	14%	15%	11%	9%	10%	8%
3+	18%	22%	15%	13%	17%	12%
2+	25%	30%	23%	17%	26%	21%
1+	33%	43%	38%	28%	47%	38%
0+	100%	100%	100%	100%	100%	99%

brand. This finding then supports the notion that the higher failure rate observed for the grids is probably a manifestation of the grids themselves. Or, said another way, the use of grids to detect cheaters may be counterproductive in that their presence may actually encourage the very behavior we're trying to eliminate.

Objective 4: Does it make sense to add at least two real brands into the list of fictitious brands?

Just as we were concerned that response type (yes/no grids vs. pick-lists) could influence how respondents might answer questions about fictitious brands, we also wanted to see how the inclusion of a few real brands might impact results. The left side of Table 3 represents the cells where there were no real brands in-

cluded in the brand list, and the right side reflects data from the cells where two real brands were included. The difference is dramatic. The failure rate (false positives) on the left side of the chart – the side with no real brands – is substantially higher than the failure rate on the right side.

We believe this lends some support to the idea that omitting real brands from the list fosters false positives. It also seems fairly intuitive as well. From a respondent's perspective, it's easy to see how one might think that a list of brands should not be totally free of brands they know. We might think of it as "the emperor's new clothes" effect. In this case, being unaware of all 10 brands listed for a widely-used category could negatively affect one's self-image, thereby encouraging a respondent to select

●●● the business of research

Still fighting the good fight

A report on the 2013 Quirk's corporate researcher study

| By Joseph Rydholm



snapshot

Responses to the inaugural Quirk's corporate researcher survey show a group that's often overworked and underappreciated but still focused on delivering quality data for their organizations.

As the editor of *Quirk's*, I want to make sure that our magazine, e-newsletter and blogs are covering topics that are helpful and interesting to our readers but I also want us get to know you better. I chat with subscribers at conferences and other industry events to glean a feel for the zeitgeist but it's also nice to draw from a larger sample to confirm some impressions and also uncover new paths down which to travel.

And now I can, thanks to the first iteration of our annual Quirk's corporate researcher survey. One of our main goals with the study was to take the pulse of the corporate researcher, to see what's on their minds. Questions focused on the makeup and workings of their departments; their pain points and challenges; how they assess their own performance and how others assess theirs; their preferred ways of staying up to date on the industry and its methods and their views on the value and staying power of newer research methods.

The survey was fielded with the much-appreciated support of several industry bodies, including the Marketing Research Association, ESOMAR, the Pharmaceutical Marketing Research Group, the Marketing Research Institute International, the University of Georgia, the University of Texas Arlington's master of science in marketing research program and the A.C. Nielsen Center for Marketing Research at the University of Wisconsin – Madison. We received 775 responses.

Leaf in the wind

Anecdotally, the picture is sometimes painted of the researcher as a leaf in the wind, being buffeted about by internal forces such as a lack of respect for the MR function, the whims of corporate politics and budget restraints. These and other issues are no doubt factors with which researchers have to contend but the responses to our survey questions paint a more hopeful picture.



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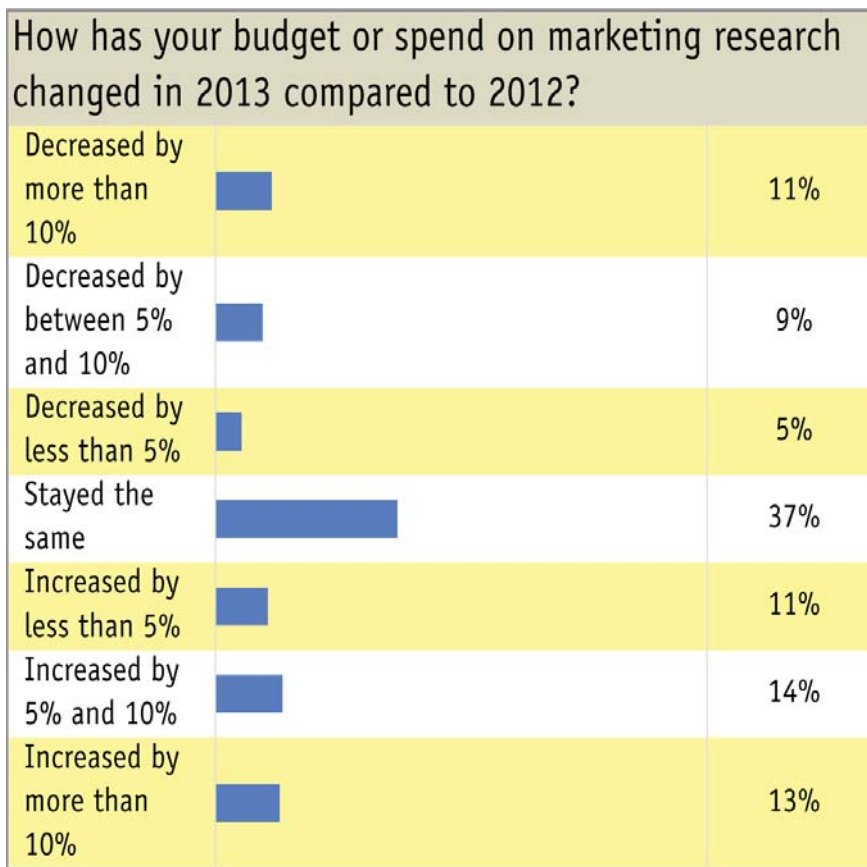
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On the budget front, as Figure 1 shows, while just over a third (37 percent) reported that their 2013 MR budget stayed the same as 2012's, an almost equal number, in aggregate, reported increases, with 11 percent claiming an increase of less than 5 percent, another 14 percent claiming an increase of between 5 percent and 10 percent and a final 13 percent saying their budgets went up by more than 10 percent. In contrast, about a quarter of respondents reported a decrease in their available funds for MR.

Just over half of the respondents are in situations where there are from one to five full-time research/insights employees at their organizations, a fact reflected in the many "too much work, not enough time or budget"-type comments we received in response to one of the open-ends.

One survey question asked "How would you rate your company's research department on the following fronts?" and, using a five-point scale of very poor to very good, the majority rated their level of influence within the company in the good to very good

Figure 1



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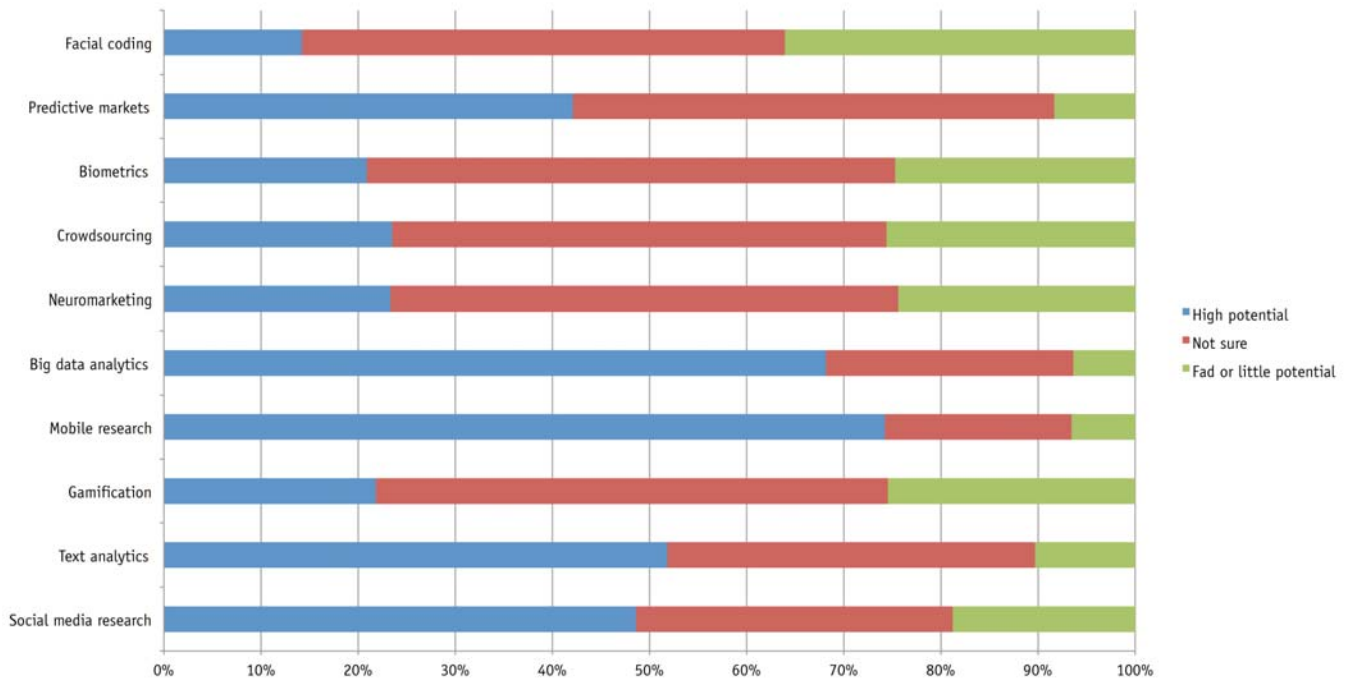
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Figure 2

Which of these newer techniques (if any) do you feel have a high potential to add real value to the research process and which do you feel are fads?



range; same for the ability to solve business problems using research. In response to “ability to uncover business opportunities using research” and “ability to mitigate risk for the company using research,” things were a little less sunny, with larger numbers of “fair” responses.

A companion question asked them to rate how they felt others viewed the MR department on those same aspects and while there is a disconnect between researchers’ self-assessments and those of others (more responses in the “fair” category and fewer in “very good”), the respondents seem to have a realistic (as opposed to delusional or overly-pessimistic) take on their standing with external audiences.

Similarly, when asked to assess how their departments compare to the departments at other companies, they typically rated themselves in the good to very good range on their level of influence within the company and their ability to solve business problems using research. And again, impressions leaned more toward the fair-to-good side on the topics of uncovering business opportunities and mitigating risk.

Admirably stubborn

Based on our findings, it also appears that researchers are admirably stubborn in sticking to their methodological guns in the face of the incessant calls from industry observers for them to embrace the hottest, newest techniques to avoid irrelevance. To the question “How important are the following factors when choosing which research techniques to use?” much more weight was placed on “representative sample,” “response rate” and “proven methodology” than was placed on “cutting-edge methodology.”

“Speed” and “low cost” were paramount – proof that the search for the Holy Grail of faster + cheaper endures – but “cutting-edge methodology” drew the largest number of responses in the range of “somewhat unimportant” and “neither important nor unimportant” to “somewhat important.”

Those aforementioned industry observers would likely say that these findings are proof the profession is old-fashioned and hidebound and therefore doomed but the view from here is that researchers are keenly aware that their jobs depend on delivering accurate, rigorous data and that cutting-edge techniques don’t guarantee accuracy or rigor – yet.

Indeed, data from our study shows that they are very much open to considering newer approaches and aren’t rejecting them out of hand simply because of their novelty. We asked respondents to rate the potential of a number of newer methods (Figure 2), from social media research and gamification to crowdsourcing and biometrics. Mobile research and big data analytics garnered the largest number of “high potential” votes, followed by text analytics and social media research. Facial coding, crowdsourcing and gamification drew the highest number of “fad or little potential” votes. In the main, though, the “not sure” votes won out in most cases, showing that more evidence is needed to convince those on the fence that these trendy techniques have staying power.

When it comes to staying on top of what’s new in the industry, as shown in Figure 3, researchers cited reading print or digital magazines and e-newsletters, attending research-related Webinars and reading blogs or Web sites as their top choices (multiple responses were accepted). Requesting information from existing or new suppliers was also popular. Less popular but not insignificant were attend-

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Figure 3

In the last 12 months, which of the following actions have you taken to stay up-to-date on research methodologies and techniques? Check all that apply.

Read print or digital magazines and e-newsletters		92%
Attended a research-related Webinar		75%
Read blogs or Web sites		75%
Requested information from existing research suppliers		68%
Requested information from potential new research suppliers		66%
Traveled to a research-related conference or event		40%
Attended a research-related virtual conference or event		31%
Participated in online discussions (such as in research-related LinkedIn groups, etc.)		30%
Attended a local research-related conference or event		28%
None of the above		1%

ing research-related conferences or events, both in-person and virtual.

On the topic of social media as a source of information about MR, we appear to be an industry of lurkers. Many respondents said they visit research-related blogs, LinkedIn groups and Twitter on a fairly regular basis (an equally substantial number said they never followed the various social media outlets or did so less than once a month) but that's about as far as they go: Many respondents said they never post or otherwise actively participate in social media discussions related to marketing research.

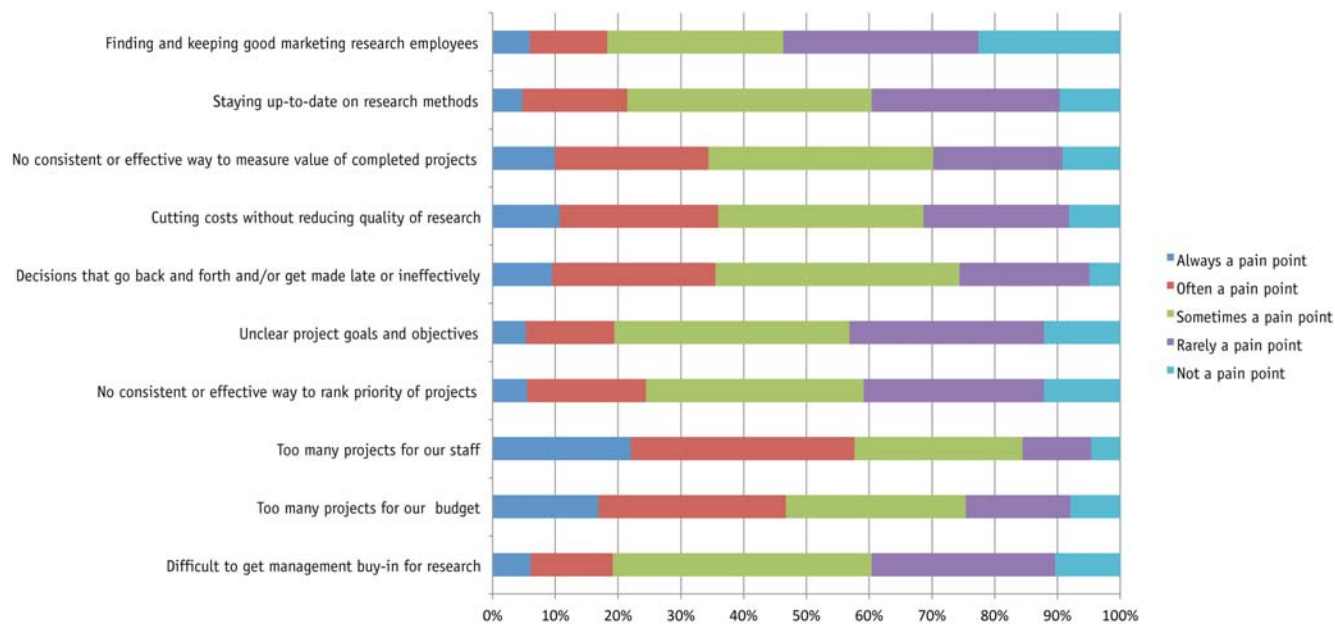
Discontent with vendors

We asked an open-end about the pain points or other challenges they experience in conducting, coordinating and managing the research process (Figure 4). As expected, perennial problems like "too many projects, not enough time or money" and the hassles of dealing with rogue surveying by non-researchers were frequently mentioned, as they have been in other surveys we have conducted. But what jumped to the fore this time was the level of discontent with vendors. Here is a sampling of responses:

"Difficult to find quality research vendors."

Figure 4

What are your primary pain points in managing/conducting marketing research at your company?



“Suppliers underdelivering ... data quality and reporting are table stakes. We need our research partners to provide insights and meaning, not just deliver a 100-slide PowerPoint.”

“Dealing with unresponsive research vendors.”

“Working with suppliers who offer actionable insights.”

“Finding reliable research suppliers who can live up to what they promote when selling their capabilities as related to the various research activities we engage in (i.e., providing useful insights, error-free data analysis and results-presentation materials).”

“Getting good quality work out of vendors. They tend to be less experienced now and frequently suggest approaches/designs that they are unable to explain or stand behind.”

Away from problems with vendors, many researchers can no doubt identify and empathize with these additional viewpoints expressed in the open-end responses:

“As an internal research agency, we are challenged with having enough bandwidth to ‘think’ for innovation, for ‘What if we looked at the data this way?’ Instead, our time is spent on just answering the objectives at hand. The benefit of being internal should be the ability to connect the dots with our business to provide the extra value. Sadly, never enough time or bandwidth to do that.”

“Nobody in the start-up/tech world understands how long traditional market research takes to conduct. With the lean start-up mentality, even a six-week turn-around is too long for most people. That being said, everyone requests research but they are too idiotic to understand how and why to do this and don’t think their requests through at all. Research gets a lot of criticism for not being aligned with our business objectives but those same antagonists will then turn around and use research in every deck.”

“Senior executive management saying too much market research is being done to make decisions, while then saying how important customer insight is to what we do (dissonance!).”

“Convincing decision makers of the importance of including ‘scientific’ research – not just a question thrown out on Facebook.”

“While I manage the budget, the dollar amounts come from marketing. When marketing runs low on funds (which they often do) we have to cut projects that are important. Not having full control of my budget is beyond frustrating.”

“Two things come to mind. Unfortunately this company does not value data; it says it does but really it doesn’t. Executives want to know why customers are doing or not doing something but we have no tools or budget to get those answers. So then they guess or do the exact same thing as last year and then panic

when it doesn’t work. Secondly, the lack of budget is such a hindrance. And not that we want to spend millions on research but for a [multi]-billion-dollar company, we get \$50k for the year. We are stuck doing quantitative efforts as we have software at our disposal. I have to fight to get \$50 gift cards as incentives.”

Battles will endure

There were other, more positive takes from some respondents on their current situations but even among researchers in seemingly supportive organizational environments, there are battles that will likely endure:

“Market research is a well-respected group in my company. The information is used all the way up the chain to the CEO. However, there are a few areas that are challenging: 1) I work on several cross-functional teams of which market research is a big part and it’s challenging to have to explain the process to each new group of team members. 2) We outsource some of our work to vendors to help us manage the high volume of work our department has. We stay heavily involved in the project with the vendor but to some internal folks it seems like we don’t do anything and the vendor does all the work. To some we have to constantly prove our value-add to the project. 3) Not enough time to be creative in the way we present and/or collect the data.”

Q

Names of Note

■ *Telemundo Media*, Hialeah, Fla., has appointed **Latha Sarathy** as vice president, digital research, and promoted **Yatisha Bothwell** to vice president, insights and strategy. Both will be based in New York.

■ *MediaTek Inc.*, a Taiwan semiconductor company, has named **Justin Wang** general manager, corporate marketing. Research will be among his responsibilities.

■ *Las Vegas Sands Corp.* has named **David Horton** CMO.

■ *ITV*, London, has hired **Sarah Speake** as director, commercial marketing and research.

■ *Comcast*, Philadelphia, has hired **Ed Brassel** as senior vice president, business intelligence, Comcast cable.

■ *McLean*, Va., marketing company *Gannett Co. Inc.* has named **Judy Vogel** vice president, research.

■ *National Research*, Washington, D.C., has promoted **Lita Brown** to president. Additionally, **Ross Broussard** has joined the company as call center manager.

■ **Jasper Lim** has stepped down as education director of the *Mobile Marketing Research Association*, Chicago.

■ **Shuba Srinivasan** has joined Needham, Mass., research company *in4mation insights'* board of science advisors.

■ **Patricia B. Glazer** has joined *Turner Research Network*, Atlanta, as vice president.



Glazer

■ **Ryan Merkley** has joined Vancouver, B.C., research company *Vision Critical* as managing director and senior vice president, public affairs.

■ *M/A/R/C Research*, Irving, Texas, has hired **Adrienne Dulio** as qualitative specialist. Dulio will be based in Michigan.

■ *The Pulse Group PLC*, a Kuala Lumpur, Malaysia, research company, has appointed **Farra Farish** as operations manager.

■ New York research company *Hall & Partners* has promoted **Paul Edwards** to chief strategic officer in its London office.



Edwards

■ *Ogilvy CommonHealth Worldwide*, a Parsippany, N.J., marketing services company, has promoted **Mindy Price** to head of planning for its New York office. Research will be among her responsibilities.

■ Princeton, N.J., research company *ORC International* has hired **Frank Francese** as senior vice president, Intota; **Jeff Cox** as senior vice president, U.S. business development; **Richard Catrone** as executive vice president, global operations; and **Brian Cruikshank** as senior vice president. Cruikshank will be based in Minneapolis.

■ **Margie Sherr** has joined Cambridge, Mass., research company *HawkPartners LLC* as partner.

■ *20|20 Research*, Nashville, Tenn., has named **Robert Lunny** COO of its 20|20 Technology subsidiary.



Lunny

■ New York research company *Ipsos MediaCT* has hired **Evan Borak** as senior vice president of Ipsos MediaCT in the U.S. and head of the Audience Measurement Group.

■ **Elizabeth May** has been named vice president, client development, Australia and New Zealand, at *Research Now*, Plano, Texas. May will be based in Sydney, Australia.



May

Additionally, *Research Now* has promoted **Melanie Courtright** to senior vice president, client services.



Courtright

■ **Tom Rosholt** has joined *Morpace Inc.*, a Farmington Hills, Mich., research company, as vice president, analytics and modeling.

■ *MarketVision Research*, Blue Ash, Ohio, has hired **Christina Imgrund** and **Shannon Voors** as research associate, client services.

■ **Allan Fromen** has joined Framingham, Mass., research company *IDC* as vice president and consulting partner. Fromen will lead the global buyer behavior practice.



Fromen



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Research Industry News

News notes

■ **Thomas J. Turey**, former controller of **RTi Research**, Stamford, Conn., was sentenced to 54 months in federal prison after pleading guilty on May 23 to wire fraud. In the seven-and-a-half years Turey was with RTi, he embezzled a total of \$3,462,435.

■ Global market research revenue grew to \$39.1 billion in 2012, representing 3.2 percent year-over-year increase, according to the **ESOMAR Global Market Research Report 2013** from ESOMAR, Amsterdam, the Netherlands.

Acquisitions/transactions

■ New York researcher **The Nielsen Company** has completed its acquisition of Columbia, Md., research company **Arbitron Inc.** Arbitron will be rebranded Nielsen Audio and integrated into Nielsen's U.S. Watch business segment.

■ **Twitter**, Palo Alto, Calif., has acquired **Trendrr**, a New York social media business intelligence platform. Twitter will adopt Curatorr, Trendrr's Twitter-certified product designed to help improve the user experience and boost engagement.

■ Nuremberg, Germany, research company **The GfK Group** has made

a strategic investment in **Genius Digital**, a U.K. media technology solutions provider. The agreement gives GfK's clients access to Genius Digital's data capture and collection technology, which will feed into GfK's audience measurement services.

■ Chicago investment firm **Thoma Bravo LLC** has acquired San Mateo, Calif., research company **Keynote** for approximately \$395 million. Keynote will remain headquartered in San Mateo and Jennifer Tejada will serve as CEO.

■ **STW Communications Group Ltd.**, New South Wales, Australia, has acquired majority stake in Australia research company **Colmar Brunton**.

■ Montreal research company **Leger** has acquired Toronto research company **IFOP North America**.

■ **IRI**, a Chicago research company, has acquired Australia-based market measurement company **Aztec** from Aegis Media.

■ Portland, Ore., research company **Rentrak Corp.** has acquired New Rochelle, N.Y., research company **iTVX**.

■ **Focus Pointe Global**, a Philadelphia research company, has acquired St. Louis research company **Delve**, bringing Focus Pointe Global's total number of U.S. research facilities to 18. Duplicative Delve facilities in the Philadelphia and Dallas suburbs will be closed as leases expire.

Alliances/strategic partnerships

■ Research companies **SDL**, Maidenhead, U.K., and **Webtrends**, Portland, Ore., have partnered to integrate Webtrends' analytics platform Webtrends Streams into the SDL Intelligent Marketing Suite.

■ Kuala Lumpur, Malaysia, research company **Pulsate** has collaborated with **Dell**, **Intel** and **Revolution Analytics** to establish a Big Data Solutions Center in Malaysia.

■ **IntelliQ Research and Strategy Inc.**, Cincinnati, has partnered with **Get Satisfaction**, a San Francisco online community provider. The alliance allows IntelliQ to provide market research and analytics services to Get Satisfaction's clients.

■ **ORC International**, a Princeton, N.J., research company, and **MOSAIQ Market Intelligence Group**, Fountain Hills, Ariz., have partnered to help clients streamline the new product idea and concept testing process.

■ Research companies **Federated Sample**, New Orleans, and **Decipher Inc.**, Fresno, Calif., have integrated Federated Sample's Fulcrum online sampling platform with Decipher's Beacon survey and reporting platform.

Awards/rankings

■ **The NPD Group Inc.**, a Port Washington, N.Y., research company, was named to the 2013 InformationWeek 500, a list of the top technology innovators in the U.S. NPD was recognized for its DecisionKey Web-based business intelligence tool.

■ **ELQ Market Research Inc.**, Tinley Park, Ill., received the 2013 Best in QUEST Award from Shelton, Conn., research company **SSI** for creating the most engaging research experiences. The Best Mobile Survey Experience Award went to **Wilke**, an Odense, Denmark, research company.

■ Horsham, Pa., research company **LRA Worldwide Inc.** was named to



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the Inc. 500|5000 list of the fastest-growing U.S. companies, ranked according to percentage revenue growth from 2009 to 2012.

New accounts/projects

■ U.K. parenting Web site **Netmums** has selected Surrey, U.K., research company **EasyInsites** to conduct advertising effectiveness research.

■ **Nestlé** Malaysia has adopted New York research company **Millward Brown's** mobile-enabled tracking solution. Additionally, Millward Brown has added **On Device Research**, London, as a preferred provider for data collection via the mobile Internet in the AMAP region.

■ Vancouver, B.C., research company **Vision Critical** has partnered with the **University of British Columbia** (UBC) to launch the Open Minds Forum, a private online community created for UBC to engage with its students and alumni.

■ **Nebu**, a Uitgeest, Netherlands, research company, has integrated Stockholm, Sweden, research company **Cint's** Cint Link solution into its Dub Interviewer research software, allowing Nebu clients access to Cint's panel platform OpinionHUB.

■ **A+E Networks LLC**, New York, has selected Portland, Ore., research company **Rentrak Corp.'s** TV Essentials Polk and MasterCard product consumption data for six of its brands. Additionally, **The Price Group**, a Lubbock, Texas, advertising agency, has adopted Rentrak's StationView Essentials television ratings service under a multi-year contract.

■ **Full Circle Research**, Washington, D.C.; **Research Results**, Fitchburg, Mass.; **Solvero**, Norrköping, Sweden; and **Tribes Research Surrey**, U.K., have adopted Kinesis Panel from **Kinesis Survey Technologies LLC**, Austin, Texas.

■ London research company **MESH** has licensed the Beacon survey and reporting platform from **Decrypt**, the London branch of Fresno, Calif.,

research company **Decipher Inc.**

Additionally, Decrypt has made Germany-based research technology company **datab** the official reseller of Beacon in Germany, Austria and Switzerland.

■ **Australia Online Research**, Sydney, Australia, has adopted New York advertising and media software and services company **Telmar's** SurveyTime software for its Syndicated Australian Market Survey.

New companies/new divisions/relocations/expansions

■ Mark Stapylton has established **BrandPanorama Research and Consulting LLC** in Rhinebeck, N.Y. The company is online at www.brandpanorama.com.

■ **Evalueserve**, a Gurgaon, India, research company, has opened an office in Dubai, United Arab Emirates, in the Emarat Atrium on Sheikh Zayed Rd.

■ **Badgeville**, a Redwood City, Calif., gamification company, has launched **The Behavior Lab**, a center designed to help businesses increase customer loyalty and employee engagement using behavior management and gamification techniques.

■ Cupertino, Calif., data management company **BlueKai** has opened a new London office and appointed Zuzanna Gierlinska as managing director, U.K.

■ **Clarabridge**, a Reston, Va., research software company has expanded its services into Latin America. Operating out of Miami, the Latin America team will focus on Brazil, Mexico, Argentina, Colombia, Peru and Chile.

■ Farmington, Conn., research company **The Pert Group** has relocated its London office to 154-160 Fleet St. Its phone number has changed but e-mail addresses will remain the same.

■ **Psyma International Inc.**, a King of Prussia, Pa., research company, has opened a West Coast office in Pacifica, Calif. James Roberts will head the office.

■ Barcelona, Spain, research company **Netquest** has opened an office in New York.

■ Italian publishing organization **Gruppo 24 Ore** and **Cielo Research**, Formia, Italy, have partnered to launch HQ24 Insight Research, a market research division of Gruppo 24 Ore.

■ Westminster, Colo., research company **Datalogix** has opened a Chicago office.

■ **SIS International Research**, New York, has opened an office in Berlin, Germany, managed by Christoph Bodden-BruX.

■ **SurveyHealthCare**, a New York research company, has opened an office in Pocatello, Idaho, at 1155 Yellowstone Ave., Suite D. Jason Freeman will manage the office.

■ **Accelerant Research**, Charlotte, N.C., has opened a new focus group facility in Charlotte.

Research company earnings/financial news

■ **Apmatrix**, San Diego, has secured financing from Analytics Ventures, La Costa Investment Group and KI Investment Holdings LLC to accelerate subscriber growth prior to a Series A round in 2014.

■ **Parse.ly**, New York, has raised \$5 million in a Series A funding round led by Grotech Ventures with participation from Blumberg Capital, ff Venture Capital and FundersClub. The financing will be used to expand the company's sales, marketing and engineering efforts.

■ **Clarabridge Inc.**, Reston, Va., has completed an \$80 million equity investment by General Catalyst Partners, Summit Partners and Unica-founder Yuchun Lee. As part of the transaction, Yuchun Lee will join as Clarabridge's chairman of the board and Larry Bohn of General Catalyst Partners and Tom Jennings of Summit Partners will join as board directors.

CALENDAR OF EVENTS

●●● can't-miss activities

The International Quality and Productivity Center will hold a conference, themed "Big Data Business Forum," on **November 13-15** in **San Francisco**. Visit www.bigdatabusinessforum.com.

The International Quality and Productivity Center will hold a conference focused on digital marketing mix and metrics, themed "Create the Right Marketing Mix to Optimize Your Return on Investment," on **November 13-15** in **Miami**. Visit www.digitalmarketingmixandmetrics.com/?MAC=DM_QUIRKS.

IIR will hold its annual conference focused on future trends on **November 13-15** in at the W Hollywood in **Los Angeles**. Save 20 percent on registration when you register through Quirk's. Visit www.iirusa.com/futuretrends/home.xml?registration=FT13QUIRKS.

ESOMAR will hold its qualitative research conference on **November 17-19** at the Westin Valencia in **Valencia, Spain**. Visit www.esomar.org.

The Mystery Shopping Providers Association will hold its annual Asia-Pacific conference on **November 18-20** in **Singapore**. Visit www.mysteryshop.org.

ESOMAR will hold a research forum, titled "The Future of Mobility," on **November 19-20** at the Westin Valencia in **Valencia, Spain**. Visit www.esomar.org.

Innovation Enterprise will hold the Chief Innovation Summit **December 5-6** at the **New York Marriott Downtown**. Visit <http://theinnovationenterprise.com/summits/CINO-summit-new-york-2013>.

Unicom will host a conference, themed "Big Data in the Context of Financial Analytics and Social Media Real-Time B2B and B2C Infonomics," on **December 5** in **London**. Visit <http://conferences.unicom.co.uk/bigdatainfonomics>.

Innovation Enterprise will hold the Chief Innovation Summit **December 5-6** at the **New York Marriott Downtown**. Visit <http://theinnovationenterprise.com/>

summits/CINO-summit-new-york-2013.

Corp Events will host its annual conference, themed "Data Marketing 2013: Unlocking the power of your customer information," on **December 9-10** at the Hyatt Regency Hotel in **Toronto**. Save 20 percent on registration when you register through Quirk's. Visit www.datamarketing.ca/uk-registration.php?promo=20&id=662.

The International Quality and Productivity Center will hold its Mobile Marketing Exchange on **January 22-24** in **Miami**. Visit www.mobilemarketingexchange-usa.com.

American Leaders will host a conference, themed "Customer Experience Management in Utilities: The Era of Empowered Customers," on **February 24-25** in **Baltimore**. Visit <http://bit.ly/1acx9dU>.

The Neuromarketing Science and Business Association will hold its annual world forum on **March 5-7** in **New York**. Visit www.neuromarketingworldforum.com.

Liveweek Business will hold a conference, themed "Market Research Week 2014: Research to Strategic Insight," on **March 20-21** at the Guragon Exhibition and Convention Center in **Guragon, Delhi, India**. Visit www.marketresearchweek.com.

ESOMAR will hold its annual Central and Eastern European research forum, themed "Research Remix," on **March 23-24** at the Novotel Bucharest City Centre Hotel in **Bucharest, Romania**. Visit www.esomar.org.

The Conference Board will hold its customer experience conference, themed "The Transformative Customer Experience," on **March 27-28** at the Ritz-Carlton **New York, Battery Park**. Visit www.conference-board.org.

ESOMAR will hold its annual Latin America conference, themed "Accelerating Growth," on **April 2-4** in **Buenos Aires, Argentina**. Visit www.esomar.org/latam.

The University of Texas at Arlington (UTA) will hold its annual conference, themed "A New Model for the Marketing Research Industry?," for alumni of its Master of Science in Marketing Research program on **April 3** at **UTA**. Visit <http://msmralumni.org>.



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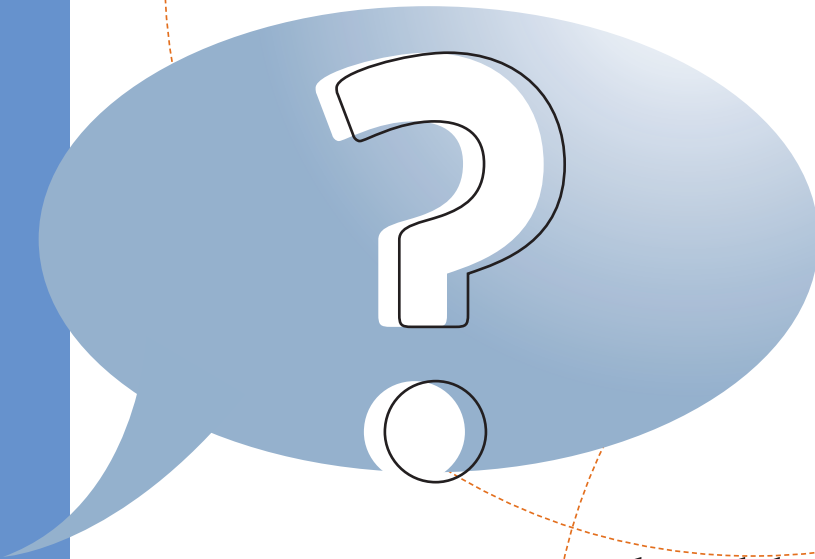
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Questions you should ask when selecting a panel provider

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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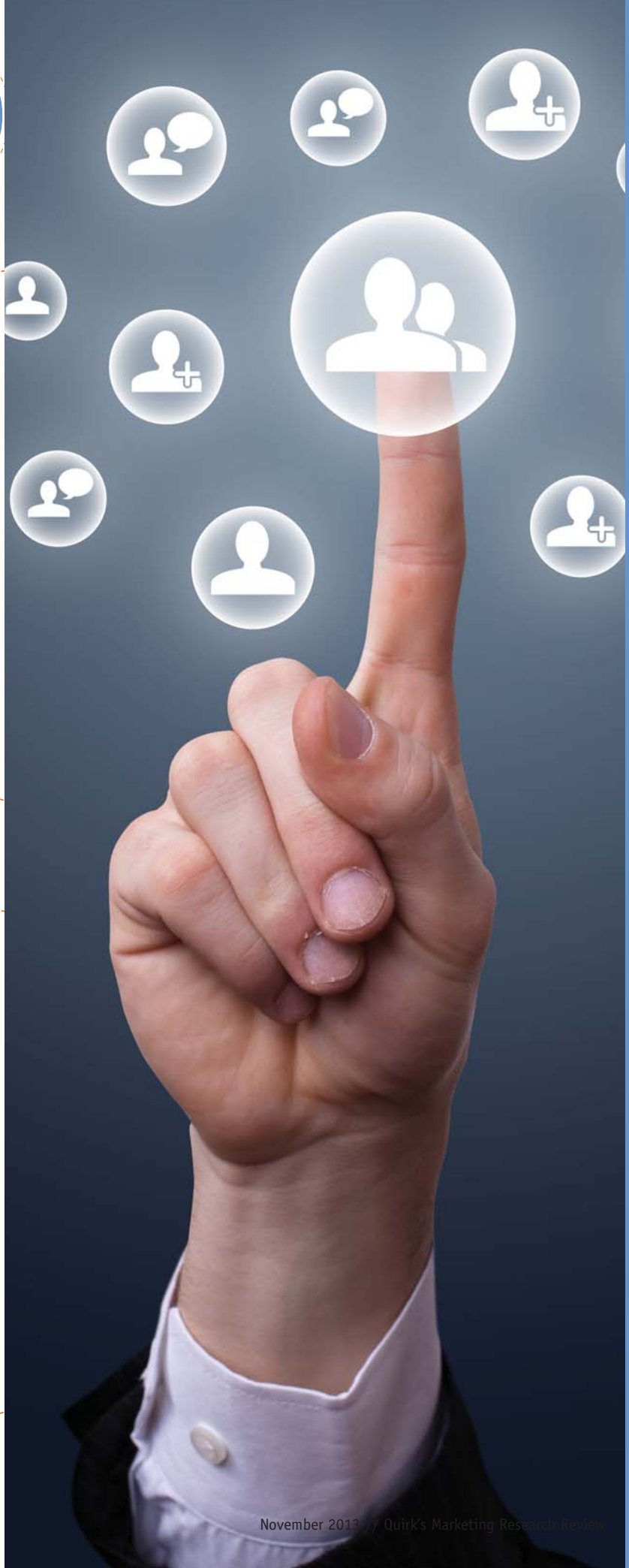


2013 Research Panels Directory

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 76, 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



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.
Stamford, 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. 52)



AIP Corporation
Tokyo Japan
Ph. 81-3-5464-8052
aip-sales@aip-global.com
www.aip-global.com/EN
Proprietary Panel Mgmt.: Yes

AIP is the Tokyo-based provider of proprietary online panels for market research data collection covering Japan, China, Korea, Taiwan, Hong Kong, Singapore, Thailand, Malaysia, Indonesia, Vietnam, India and the Philippines. We provide other products and services and recently introduced a twice-monthly omnibus service across the 12 markets we cover. We are experts at mixed methodology data collection and have an established network of offline partners we regularly work with. AIP has fully-staffed offices in New York, Tokyo, Seoul, Shanghai, Singapore, Hong Kong, London and New Delhi.

(See advertisement on p. 43)

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



American Consumer Opinion®
A Division of Decision Analyst
Arlington, TX
Ph. 817-640-6166
jthomas2@decisionanalyst.com
www.acop.com
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

American Consumer Opinion® is a set of worldwide online panels that reaches over eight million consumers in the United States, Canada, Latin America, Europe, and Asia. Consumers can sign up to become members in one of 11 languages. Complete demographic profiles are maintained for each household. These double opt-in panels are carefully recruited, rigorously managed, constantly cleaned, fairly compensated and continuously refreshed. Sophisticated sampling software balances the sample in each country to make it as representative as possible.

Amplitude Research, Inc.
Boca Raton, FL
Ph. 877-225-7950
sales@amplituderesearch.net
www.amplituderesearch.com
Stephen S. Birnkrant, CEO
Proprietary Panel Mgmt.: Yes
Panel Titles:
Census Balanced Omnibus Panel
Size: 1,000 Type: Online
Panelspeak Business and Consumer Panel
Size: 150,000 Type: Online
Panelspeak Technology Panel
Size: 20,000 Type: Online
SBO
Size: 8,000 Type: Online

Anderson Analytics, LLC
OdiText
Stamford, CT
Ph. 888-891-3115 or 203-912-7175
inquiries@andersonanalytics.com
www.OdiText.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
mhynd@annmichaelsltd.com
www.annmichaelsltd.com
Proprietary Panel Mgmt.: Yes

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



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. 49)

AutoPacfic, Inc.
Tustin, CA
Ph. 714-838-4234
dan.hall@autopacific.com
www.autopacific.com
Panel Titles:
AutoPacfic 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
gd isimile@betaresearch.com
www.BetaResearch.com
Proprietary Panel Mgmt.: Yes



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: 200,000 Type: Online
Borderless Access Panels - China - Consumer & B2B
Size: 225,000 Type: Online
Borderless Access Panels - India - Consumer & B2B
Size: 400,000 Type: Online
Borderless Access Panels - Indonesia Consumer/B2B
Size: 65,000 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: 75,000 Type: Online
Borderless Access Panels - South Korea Consum/B2B
Size: 15,000 Type: Online
Borderless Access Panels - Taiwan- Consumer & B2B
Size: 20,000 Type: Online
Borderless Access Panels - Turkey - Consumer & B2B
Size: 30,000 Type: Online

Borderless Access specializes in providing online panel services in emerging market nations. We have over 1.4 million proprietary panelists in 11 countries and

conduct almost half a million interviews across all our markets annually. We have also built over 50 custom panels across numerous industry verticals: health and wellness, IT, retail, finance, pharmaceuticals, travel and mobile. We have developed strong specialist panels in both B2B and various consumer niche groups such as IT and health care, while our global alliances let us reach over tens of millions more respondents across 65 countries.

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

C+R

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



Reliability and representation that is bar none.



Commitment to Service

- Dedicated project managers ensure your project is delivered on time and on budget.
- A full range of service offerings, including programming and hosting, to meet all your data collection needs.
- Experienced consultants work closely with your team to fine-tune approach and guarantee optimal panel participation and results.

Do you really know who you're talking to?

Ask us about our panelist verification process. It meets your needs for verification, reliability and representation.

As a **market research professional**, you want timely access to high-quality consumer and B2B opinion.

As a **client**, you want attentive and personal service.

Clear Voice Research delivers both!

Practice areas and industry experience in **CPG, Financial Markets, Healthcare, IT and Telecom**

Panel Stats

- Established 2006
- 10,000 online studies completed
- Global reach, with panelists in over 41 countries
- More than 10 million panelists vetted to ensure we find the respondents you need

1675 Larimer Street, Suite 640 · Denver, CO 80202 USA · sales@clearvoiceresearch.com · 303.895.3613

**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

Cido Research

Thornhill, ON Canada
Ph. 905-707-1300 or 999-707-3622
bids@cidoresearch.com
www.cidoresearch.com
Anton Nicolaidis, VP, Sales/Client Services
Panel Titles:
Ethnic Voice Accord (EVA)
Size: 20,000 Type: Online

**Cint USA**

Lawrenceville, NJ
Ph. 609-759-0790
learnmore@cint.com
www.cint.com
Proprietary Panel Mgmt.: Yes

Cint empowers access to opinions by innovating market research technology. Reach 10 million people in 57 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

myCLEAROpinion specializes in delivering the highest quality B-to-B industry sample to the market research community. Our areas of expertise include: Architecture/Construction/Maintenance; HVACR; Flooring/Floor Maintenance; Plumbing; Safety & Security; Manufacturing & Logistics; Food & Beverage; Food Retailing; Packaging; Specialty Food Markets; Casino Gaming. Our dedication to customer service and our robust levels of communication and responsiveness ensure that we can deliver the right sample when you need it. myCLEAROpinion is your CLEAR choice for industry sample!

(See advertisement on p. 11)

**Clear Voice Research.com, LLC**

Denver, CO
Ph. 303-895-3613
sales@clearvoiceresearch.com
www.clearvoiceresearch.com
Julian Lewis, Managing Director
Panel Titles:
Clear Voice Business
Type: Online
Clear Voice Consumer
Type: Online
Clear Voice Medical
Type: Online

Where does sample come from? We manage the sample supply chain from top to bottom. Clear Voice Research works with the world's largest market research and consulting companies on quant and qual research execution. We have delivered on thousands of projects with our online consumer, B2B and health care panels. We build and manage private research panels with our in-house panel management and e-mail platform. We also offer customized recruiting, programming, CATI, data processing, customer satisfaction and IHUTs. Contact us today to learn why Clear Voice is the clear choice for your project.

(See advertisement on p. 63)

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. 44-1372-270-041
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: 730 Type: Online
Veterinary professionals in Czech Republic
Size: 500 Type: Online
Veterinary professionals in Denmark
Size: 325 Type: Online
Veterinary professionals in Finland
Size: 220 Type: Online
Veterinary professionals in France
Size: 2,000 Type: Online
Veterinary professionals in Germany
Size: 2,100 Type: Online
Veterinary professionals in Italy
Size: 1,700 Type: Online
Veterinary professionals in Netherlands
Size: 560 Type: Online
Veterinary professionals in Poland
Size: 580 Type: Online
Veterinary professionals in Spain
Size: 1,400 Type: Online
Veterinary professionals in Sweden
Size: 330 Type: Online
Veterinary professionals in Switzerland
Size: 300 Type: Online
Veterinary professionals in the UK
Size: 1,750 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@ccresearch.com
www.ccresearch.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

**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. In addition, we offer clients in-house shipping, handling, and procurement of products for IHUT testing. 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.

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
First4Families (UK)
Size: 10,000 Type: Online
Mom365 momSpeaks (US)
Size: 10,000 Type: Online
WHSmith Surveys (UK)
Size: 12,000 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

EMI - Research Solutions

Cincinnati, OH
Ph. 513-871-1178
sales@emi-ors.com
www.emi-ors.com
Jason Scott, SVP, Client Services
Panel Titles:
Online Global B2B
Size: 10,000,000 Type: Online
Online Global B2C
Size: 65,000,000 Type: Online
Online Global Healthcare
Size: 9,000,000 Type: Online

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



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. 25)

FGI Research

Chapel Hill, NC
Ph. 919-929-7759
salesteam@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 Pointe Global - Philadelphia

Philadelphia, PA
Ph. 888-873-6287 or 215-701-1500
phila@focuspointeglobal.com
www.focuspointeglobal.com
Ileen Branderbit, EVP
Proprietary Panel Mgmt.: Yes
Panel Titles:
FPG Patient Panel
Size: 300,000 Type: Online
FPG QualPanel
Size: 802,000 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

The Gallup Organization - Omaha

Omaha, NE
Ph. 402-951-2003
Jerry_krueger@gallup.com
www.gallup.com
Jerry Krueger
Proprietary Panel Mgmt.: Yes
Panel Titles:
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. 49)

**GfK**

New York, NY
Ph. 212-240-5300
us@gfk.com
www.gfk.com/us
Chuck McCormick
Proprietary Panel Mgmt.: Yes
Panel Titles:
Cada CabezaSM
Size: 14,500 Type: Online
Consumer Access Panel
Size: 1,000,000 Type: Online
KnowledgePanel LatinoSM
Size: 11,000 Type: Online
KnowledgePanel[®]
Size: 60,000 Type: Online
National Shopper Lab
Size: 20,000,000
Physicians Consulting Network (PCN[®])
Type: Online

GfK is one of the world's leading full-service market research companies, with around 13,000 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.

Glocal Mind Inc.

Frisco, TX
Ph. 215-366-2787 or 646-290-6655
vrinda.d@glocalmind.com
www.glocalmind.com
Sandeep Sankhla, Managing Partner
Panel Titles:
Nurses Panel
Size: 35,000 Type: Telephone, Online
Pharmacists
Size: 25,000 Type: Telephone, Online
Physician Panel
Size: 700,000 Type: Telephone, Online

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

Bellevue, WA
Ph. 866-5-ASK GMI or 206-315-9300
info@gmi-mr.com
www.gmi-mr.com
Dan Fitzgerald, V.P., Americas
Proprietary Panel Mgmt.: Yes
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 and www.gmi-mrblog.com.
(See advertisement on p. 39)

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

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: 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 Australia (Canberra)

Canberra, ACT Australia
Ph. 61-8-9321-5415
enquires@ipsos.com.au
www.ipsos.com
Panel Titles:
The Buzz

Ipsos North America - USA Headquarters

Ipsos ASI / Ipsos Interactive Services / Ipsos Marketing / Ipsos Mendelsohn / Ipsos Public Affairs
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™ utilizes the most powerful and advanced market research panel software and offers comprehensive panel management services to empower clients and help them achieve their panel goals. Kinesis Panels facilitates the creation of dynamic communities that engage panelists and increase response rates, while continually assessing panel health, to sustain thriving panels. The managed panel services include full management for mobile, Web and dual-mode panels, initial panel setup, ongoing recruitment initiatives, list conversion services, incentive management, respondent support, survey programming and design.

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.

www.quirks.com



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

For more than 35 years, Luth Research has been advancing next-generation consumer intelligence with innovative market research approaches. Powered by our online research panel, SurveySavvy®, and crossplatform digital tracking capabilities, as well as traditional focus group and call center services, our innovative research methods help today's businesses thrive.



M3 Global Research
Fort Washington, PA
Ph. 202-293-2288 x203
Research@usa.m3.com
http://research.m3.com

Panel Titles:
MDLinx Online Physician Community China
Type: Online
MDLinx Online Physician Community Europe Plus
Type: Online
MDLinx Online Physician Community Japan
Type: Online
MDLinx Online Physician Community Korea
Type: Online
MDLinx Online Physician Community USA
Type: Online

M3 Global Research provides the most comprehensive and highest quality market research recruitment and support services available to the global healthcare industry with relationships with over 1.7 million physicians in more than 70 countries worldwide. We operate an ISO 26362 certified panel with the highest quality data collection and project management capabilities that cover the spectrum of quantitative and qualitative techniques utilized today. Our quantitative and qualitative research services incorporate all of the most advanced statistical and attitudinal methodologies. For RFQs please email research@usa.m3.com.

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

Macromillembrian
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: 1.5 million Type: Online

Market Reader Pro
Fogelsville, PA
Ph. 610-737-0116
cdahlin@marketreaderpro.com
www.marketreaderpro.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Market Reader Pro™ Consumers (worldwide mostly US)
Size: 160,000 Type: Online



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. 49)

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. 954-654-7888 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

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

MERCURY Research

Bucharest Romania
Ph. 40-21-224-6600
contact@mercury.ro
www.mercury.ro
Proprietary Panel Mgmt.: Yes
Panel Titles:
Online Consumer Panel
Size: 43,000 Type: 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 Medical: Physician and Patient Panels
Type: Telephone, Online
MindField Mothers - Children Panel
Type: Online
MindField Pet Owner Panel
Type: Online
MindField Technology
Type: Online
MindField Teen Panel
Type: Online
MindField Travel and Leisure Panel
Type: Online
MindField Vision Care Panel
Type: Online

MindField is your dependable, high-quality source for online research with no minimum panel fees. Using the most sophisticated combination of software and hardware and the latest in fiber technology, put the power of MindField behind your projects. We provide 24/7 project management and monitoring, online reporting and our programmers are dedicated to your needs throughout all phases of your research. (See advertisement on p. 9)

Minter Research

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: 12,000 Type: Telephone, Online

Murphy Marketing Research/TrendTown

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

MyPoints.com, Inc.

San Francisco, CA
Ph. 415-200-4271
brin.moore@mypointscorp.com
www.mypointscorp.com
Brin Moore, SVP 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

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Quality Data Collection | Recruitment | Analysis

Pennsylvania: 267.487.5500 California: 650.450.9700

www.olsonresearchgroup.com

Netquest

New York, NY
Ph. 323-812-1967
cenriquez@netquest.com
www.netquest.com

Panel Titles:

- Automotive Panel
Size: 84,154 Type: Online
- B2B Panel
Size: 118,556 Type: Online
- Consumers Panel
Size: 118,271 Type: Online
- Healthcare Panel
Size: 167,831 Type: Online
- Mums Panel
Size: 23,214 Type: Online
- Sports Panel
Size: 108,227 Type: Online

NovaTest

Paris France
Ph. 33-1-43-55-29-29
vterradot@novatest.fr
www.novatest.fr

Panel Titles:

- Global Test Market
Size: 1,400,000 Type: Online
- Pharmacare
Size: 2,000



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. 68)



OMI Online Market Intelligence

Moscow Russia
Ph. 7-495-660-94-15
rfp@omirussia.ru
www.omirussia.ru/en/
Dr. Alexander Shashkin, CEO
Proprietary Panel Mgmt.: Yes
Panel Titles:
B2B IT Panel Russia
Size: 18,000 Type: Online
B2C Automotive Panel Russia
Size: 180,000 Type: Online
B2C Panel Baltic States (Lithuania, Latvia, Estonia)

- Size: 8,000 Type: Online
- B2C Panel Belarus
Size: 46,000 Type: Online
- B2C Panel Kazakhstan
Size: 18,000 Type: Online
- B2C Panel Russia
Size: 450,000 Type: Online
- B2C Panel Ukraine
Size: 127,000 Type: Online
- Patient Panel Russia
Size: 290,000 Type: Online
- Physician Panel Russia
Size: 95,000 Type: Online

OMI is a leading Russian online panel provider for marketing research. With OMI online panels you can access over 550,000 consumers, 180,000 vehicle owners, 18,000 IT professionals and 95,000 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. 69)

OnCampus Research

Oberlin, OH
Ph. 440-775-7777 or 800-622-7498
info@oncampusresearch.org
www.oncampusresearch.com
Elizabeth Riddle, Director
Panel Titles:
OnCampus Research Student Panel
Size: 18,000 Type: Online



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

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Consumers 550k+	Automotive 150k+	Mobile 35k+
B2B IT 18k+	Patients 200k+	Physicians 95k+

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The ONLY PANEL IN RUSSIA awarded with the Mktg, Inc. **Gold Certificate** for data quality and consistency

Also covering Ukraine, Kazakhstan and the Baltic States

OMI – Russia
GOLD CERTIFICATE

Grand Mean = \bar{x}

Consistent Track Excellence

$\bar{x} = \sum x_j / n$

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Mktg.
Incorporated

Opinion Search Inc.

Ottawa, ON Canada
Ph. 800-363-4229 or 613-230-9100
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 (Focus Forward) 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

Paradigm

Port Washington, NY
Ph. 877-277-8009 x100
bids@paradigmsample.com
www.paradigmsample.com
Panel Titles:
Convenience Consumer Insights Panel (cciPanel)
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,

Precision Research Inc.

Phoenix, AZ
Ph. 888-997-9711
madams@precisionresearchinc.com
www.precisionresearchinc.com
Maureen Adams, Sr. VP, Sales/Business Develop
Proprietary Panel Mgmt.: Yes
Panel Titles:
Precision Research Custom Panels
Size: 500,000+ Type: Mail, Telephone, Online

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. 603-2201-5156
info@pulse-group.com
www.pulse-group.com
Bob Chua, CEO
Panel Titles:
www.planet-pulse.com
Size: 1,500,000 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
jill.ransome@questback.com
www.questback.com
Proprietary Panel Mgmt.: Yes

Every survey consists of two fixed points: the response and the person giving the response. Our panel database compiles information on feedback providers. The focus is on responses that a person has given. Additionally, mobile device location information, tracking data (e.g., log files), or company database transaction data can be appended to obtain an even better overall view. We store personal data and survey data separately of course. Our panel database is used to select a specific sample group out of a large number of people for surveys; for longitudinal studies and to initiate event-based feedback.
(See advertisement on p. 45)

**Radius Global Market Research**

New York, NY
Ph. 212-633-1100
info@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

Radius' proprietary Know More™ Internet panel represents over 3.4 million households, with over 6 million consumers in the U.S. and over 1.5 million consumers in Canada, the U.K. and Europe, Australia and Scandinavia. This size and reach allow Radius Global Market Research to support both ad hoc and ongoing tracking studies that require detailed quotas across gender, age, ethnicity and geography. Know More™ is a multi-sourced panel, using 15 to 25 different sources and a variety of methodologies. This allows us to provide a composition that reaches beyond the panelists to include other household members, including children, teenagers and seniors — groups that can be difficult to reach online.
(See advertisement on p. 7)

Rare Patient Voice, LLC

Towson, MD
Ph. 410-218-0527
wes.michael@rarepatientvoice.com
www.rarepatientvoice.com
Wes Michael, President
Panel Titles:
Hemophilia Patients and Caregivers
Size: 1,000 Type Mail, Telephone, Online
Rare and Orphan Disease Patients and Caregivers
Size: 1,000 Type Mail, Telephone, Online

**Reckner Healthcare**

Chalfont, PA
Ph. 215-822-6220
sphillippe@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 specializes in online panel research with access to over 40 million online panelists worldwide (over 53 countries), including consumer, B2B and health care. In addition we offer solutions for your low-incidence studies, decision makers, IT, management-level, physicians (national and international), hard-to-target ailments and Hispanics, with well over 400 segmentation variables. We specialize in Internet surveys, online panels, virtual focus groups and IVR. Small studies or large, if your need is simply programming, online real-time reporting or just panel research, you can count on us.

Research & Marketing Strategies, Inc.
 Baldwinsville, NY
 Ph. 315-635-9802 or 866-567-5422
 info@RMSResults.com
 www.RMSresults.com
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 RMS Consumer Panel
 Size: 1,800 Type: Telephone, Online

Research Connections Pty Ltd
 Lindfield NSW Australia
 Ph. 612-9416-0300
 terri@researchconnections.com.au
 www.researchconnections.com.au
 Panel Titles:
 Qual Recruitment and Online Survey
 Size: 70,000 Type: Telephone, Online

Research For Good Inc.
 Seattle, WA
 Ph. 425-610-7294
 sayhi@researchforgood.com
 www.researchforgood.com
 Panel Titles:
 SaySo for Good - Canada
 Size: 200,000 Type: Online
 SaySo for Good - France
 Size: 50,000 Type: Online
 SaySo for Good - Germany
 Size: 50,000 Type: Online
 SaySo for Good - UK
 Size: 50,000 Type: Online
 SaySo for Good - US
 Size: 1,000,000 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 Panel
 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. (See advertisement on wrap)

Research Panel Asia
 Culver City, CA
 Ph. 818-742-7025
 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 Results, Inc.
 Fitchburg, MA
 Ph. 978-345-5510
 info@researchresults.com
 www.researchresults.com
 John Zarella
 Proprietary Panel Mgmt.: Yes

ResearchCenter Ltd.
 Budapest Hungary
 Ph. 36-1-373-0936
 request@researchcenter.hu
 www.researchcenter.hu
 Eniko Barcza, General Manager
 Proprietary Panel Mgmt.: Yes
 Panel Titles:
 ResearchCenter Consumer Panel Hungary
 Size: 160,000 Type: Online

Resolution Research *
 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
 Manchester, 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 Efid
 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

**ROI Rocket**

Denver, CO
Ph. 303-895-3572
bids@roirocketcorp.com
www.roirocket.com

Tim Wilson
Proprietary Panel Mgmt.: Yes
Panel Titles:
ROI Rocket
Size: 800,000 Type: Telephone, Online

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(See advertisement on p. 73)

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

Shifrin-Hayworth

Southfield, MI
Ph. 248-223-0020
research@shifrin-hayworth.com
www.shifrin-hayworth.com
Arlene Hayworth-Speiser, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
National Database - USA
Size: 200,000 Type: Mail, Telephone, Online

Signet Research, Inc.

Cliffside Park, NJ
Ph. 201-945-6903 or 201-945-6904
joanna@signetresearch.com
www.signetresearch.com
Joanna Zanolou, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Custom/Proprietary Panels and Community Panels

SoapBox Sample

Van Nuys, CA
Ph. 1-855-SOAPBOX (762-7269)
info@soapboxsample.com
www.soapboxsample.com
Panel Titles:
MySoapBox
Type: Online

Specpan

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



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SSI

Shelton, CT
Ph. 203-567-7200
info@surveysampling.com
www.surveysampling.com/
Proprietary Panel Mgmt.: Yes
Panel Titles:
Asiktstorget (Sweden)
Type: Online
BlauwNL (Netherlands)
Type: Online
Cafe d'Opinion (Canada)
Type: Online
Centro de Opinion (Spain)
Type: Online
Centro de Opinion (United States)
Type: Online
Centro di Opinione (Italy)
Type: Online
Choozz (Belgium)
Type: Online
Choozz (Netherlands)
Type: Online
Choozz (Sweden)
Type: Online
Choozz (United Kingdom)
Type: Online
Danmarkspanelet (Denmark)
Type: Online
IT Influencers (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
Mundodeopinões (Brazil)
Type: Online
Mundodeopinões (Portugal)
Type: Online
My Voice (South Korea)
Type: Online
Nectar Canvass (United Kingdom)
Type: Online
Opinieland (Belgium)
Type: Online
Opinieland (Netherlands)
Type: Online
Opiniolandia (Argentina)
Type: Online
Opiniolandia (Mexico)
Type: Online
Opiniolandia (Spain)
Type: Online
Opinion Miles Club (United States of America)
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
PCHonline surveys (United States of America)
Type: Online
Placedesopinions (Belgium)
Type: Online
PlacedesOpinions (Canada)
Type: Online
Placedesopinions (France)
Type: Online
Placedesopinions (Switzerland)
Type: Online
Pro Opinion (United States of America)
Type: Online
QuickThoughts (Australia)
Type: Online
QuickThoughts (France)
Type: Online
QuickThoughts (Germany)
Type: Online
QuickThoughts (Japan)
Type: Online

QuickThoughts (The Netherlands)
Type: Online

QuickThoughts (United Kingdom)
Type: Online

QuickThoughts (United Kingdom)
Type: Online

QuickThoughts (United States of America)
Type: Online

Research Opinion Poll Panel (United Kingdom)
Type: Online

SurveySpot (United States of America)
Type: Online

Swiatopinii (Poland)
Type: Online

Tell Tom's (United States of America)
Type: Online

Vakantiepunten:Onderzoekspunten Panel(Netherlands)
Type: Online

webmiles SSI Partner Panel (Austria)
Type: Online

webmiles SSI Partner Panel (Germany)
Type: Online

webmiles SSI Partner Panel (Switzerland)
Type: Online

Your Opinion (Japan)
Type: Online

Your Voice (Australia)
Type: Online

Your Voice (China)
Type: Online

Your Voice (Denmark)
Type: Online

Your Voice (Hong Kong)
Type: Online

Your Voice (India)
Type: Online

Your Voice (Malaysia)
Type: Online

Your Voice (New Zealand)
Type: Online

Your Voice (Norway)
Type: Online

Your Voice (Singapore)
Type: Online

Your Voice (Sweden)
Type: Online

Your Voice (Taiwan)
Type: Online

Your Voice (Thailand)
Type: Online

Your Voice (United Arab Emirates)
Type: Online

SSI is the world's leading provider of sampling, data collection and data analytic solutions for survey research. SSI reaches respondents across 78 nations through online, landline phone, mobile/wireless and mixed access. With 26 offices spanning every time zone and staff fluent in 34 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 insert)

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 is a full-service health care data collection company specializing in interviewing physicians, nurses, pharmacists, payers, hospitalists, allied HCP professionals working in physician offices, hospitals and clinics, dentists, vets, ophthalmologists, optometrists and other health care professionals. We have access to over two million health care professionals, sufferers and patients. At SurveyHealthCare we have the advantage of being able to supplement our e-mail panel with our in-house 500+ CATI interviewing stations. Our unique panel-plus sampling technique and SHC Hub enables us to reach more physicians, match a higher percent of a client's list and provide more representative samples.

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



www.roirocket.com



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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

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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

Tillion

Panel Marketing Interactive CO., LTD.
Seocho-gu Seoul South Korea
Ph. 82-2-2055-1028
mimikim@tillion.co.kr
www.tillion.co.kr
Mi Mi Kim, Project Manager
Panel Titles:
Tillion Panel
Size: 500,000 Type: Online

TNS Hong Kong

Causeway Bay 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
Toluna@toluna.com
www.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

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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. 720-458-8501 x801
ted@thetriplescoop.biz
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. 818-524-1218 or 877-217-9800
sales@usamp.com
www.usamp.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
uSamp™
Size: 12,000,000 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 12 million member 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 pp. 20, 21)

User Insight

Atlanta, GA
Ph. 770-391-1099
contact@userinsight.com
www.ufacilities.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
Linda Kuster, Vice President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Vernon Research Opinion Panel
Size: 20,000 Type: Online

Video Chat Network

Scarsdale, NY
Ph. 914-722-8385
rgeltman@videochatnetwork.net
http://videochatnetwork.net
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

VuPoint Research

Portland, OR
Ph. 800-344-8725
info@mdcresearch.com
www.mdcresearch.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: 37,456 Type: Online
WorldOne's Global Eye Care Panel
Size: 18,434 Type: Online
WorldOne's Global Nurse Panel
Size: 372,021 Type: Online
WorldOne's Global Pharmacists Panel
Size: 77,244 Type: Online
WorldOne's Global Physician Panel
Size: 732,497 Type: Online
WorldOne's Global Veterinarian Panel
Size: 34,779 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.

YouGov Zapera

København Ø Denmark
Ph. 45-7027-2224
info@yougov.dk
www.yougov.dk
Proprietary Panel Mgmt.: Yes
Panel Titles:
AELdresagen (DaneAge Association)
Size: 1,700 Type: Online
Dansk Metal (The Danish Metal Workers' Union)
Size: 1,000 Type: Online
Mandag Morgen (Mondag Morning Weekly)
Size: 300 Type: Online
Zapera.com Denmark Panel
Size: 38,000 Type: Online
Zapera.com Estonia Panel
Size: 4,000 Type: Online
Zapera.com Finland Panel
Size: 16,000 Type: Online
Zapera.com Medical Panel Denmark & Sweden
Size: 1,100 Type: Online
Zapera.com Norway Panel
Size: 17,000 Type: Online
Zapera.com Poland Panel
Size: 5,500 Type: Online

YouGovPolimetrix

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

Ypulse, Inc.

New York, NY
Ph. 888-292-8855
sales@ypulse.com
www.ypulse.com
Panel Titles:
SurveyU.com
Size: 160,000 Type: Online
Thumb.it
Size: 2,250,000 Type: Online

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Asians

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 Embrain Panel, Macromillembrian p. 67
 E-Poll Consumer Panel, E-Poll Market Research p. 65
e-Rewards Opinion Panel, Research Now p. 71
Esearch Children/Teens Panel, Esearch.com, Inc. p. 65
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 Focus World B-2-B Medical Panels, Focus World International, Inc. p. 65
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Children

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 Concept Development, Insight Counts p. 66
 Consumer Directions, KL Communications, Inc. p. 67
 Consumer Research, Insight Counts p. 66
 Custom/Proprietary Panels and Community Panels, Signet Research, Inc. p. 72
 Customer Satisfaction, Insight Counts p. 66
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Esearch Children/Teens Panel, Esearch.com, Inc. p. 65
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 65
 Ethnographic Research, Insight Counts p. 66
 Focus Groups, Insight Counts p. 66
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 French Panel, Netetude UK Ltd. p. 68
 German Panel, Netetude UK Ltd. p. 68
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MindField Health & Beauty Aids Brand Panel, MindField Online Internet Panels p. 68
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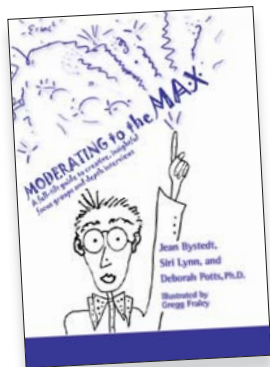
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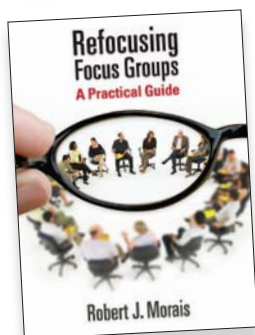
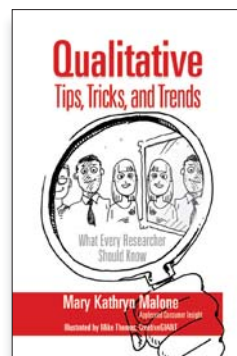
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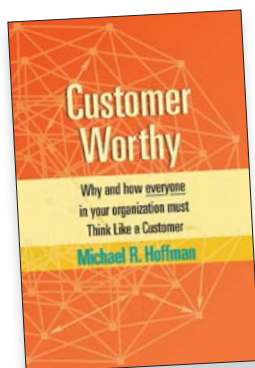
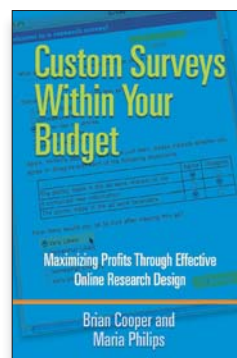
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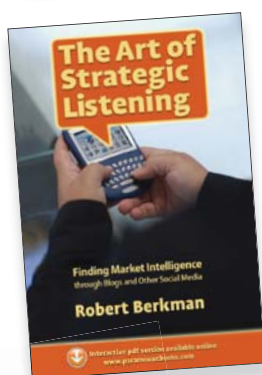
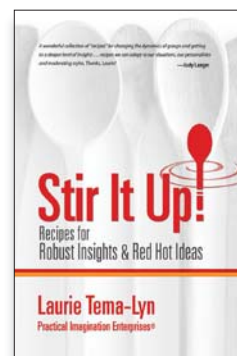
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Marketing research might not be the most glamorous but it still ranks among the top five most underrated jobs of 2013.

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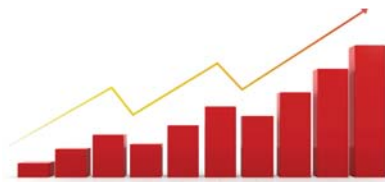
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The multi-topic omnibus format also provides a sort of natural survey terrain in which to camouflage research-on-research questions.

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Facial coding, crowdsourcing and gamification drew the highest number of "fad or little potential" votes from our customers.



Still growing strong

At press time, Quirk's hit a record high of 43,230 subscribers in 114 countries! That is growth of almost 300 percent in just five years! In fact, our distribution outside the U.S. will soon exceed our total number of subscribers in 2008.

No matter how far our reach, our mission remains unchanged: to promote the use, value and understanding of marketing research and insights. Thanks for being part of our endeavor!



Like our research on researchers? There's more!

This issue features a report on the findings of our first corporate research survey (p. X) but that's not all! Quirk's actually has a lot more data that we've collected from various sources over the past two decades!

For more than 20 years, we've been collecting responses from our subscribers each time they renew. In fact, every year we gather data on the marketing research purchase habits of 6,000+ client-side researchers. We also conduct the largest salary annual survey in the industry, with more than 3,000 responses.

All said and done, the size and longevity of this study make it the most comprehensive and thorough report our industry has ever seen. Copies of the report will be available on Quirks.com by December 1.

Coming in the December Quirk's

••• qualitative research

Kathy Carroll explores the process of using Google+ Hangouts On Air for focus groups.

••• qualitative research

Bernadette DeLamar shows how to use technology to improve your laddering exercises.

••• qualitative research

Believe it or not, conjoint-based methodologies can be successfully applied in the qualitative setting, as Mike Heasley demonstrates.



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