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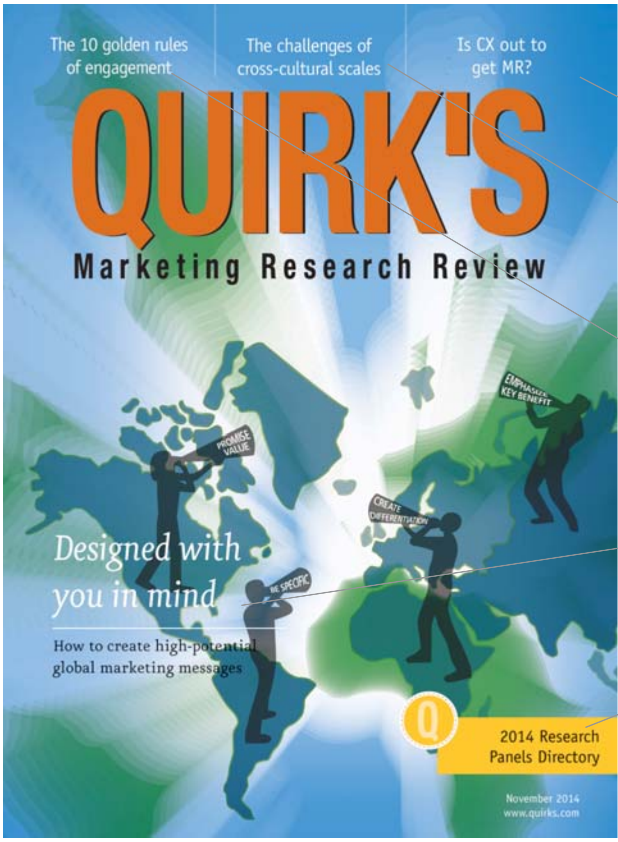

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Quirk's Research Industry Voices blog is the perfect place for you to submit op-ed style articles, blogs that have been previously published on your site or unique, time-sensitive content. Send magazine submissions to Quirk's Editor Joseph Rydholm at joe@quirks.com and any digital content (blogs, e-newsletter article submissions) to Quirk's Digital Content Editor Emily Koenig at emilyK@quirks.com. Submission guidelines are online at tinyurl.com/writeforquirks.

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••• health care research

Moms-to-be express satisfaction with group prenatal care

In a qualitative research study with women participating in group prenatal care (GPC), the women and the midwives who assisted them expressed a high level of satisfaction with their GPC experience. (In GPC, eight to 12 pregnant women of similar gestational age meet with a health care provider to receive their prenatal check-up and education in a group setting.)

The study, as reported by authors Sarah D. McDonald, Wendy Sword, Leyla E. Eryuzlu and Anne B. Biringer in the journal *BMC Pregnancy and Childbirth*, sought to gain insight into previously unexplored areas of the GPC experience, perceptions of processes that contribute to positive health outcomes, strategies to promote GPC and elements that enhance the feasibility of GPC.

Participants suggested benefits that contribute to positive health outcomes, such as learning from the group; normalizing the pregnancy experience; preparedness for labor and delivery; and improved relationships. They also cited concerns such as sufficient time with the midwife and other aspects which generally diminished with experience.

Suggestions for change focused on content, environment, partners and access to the midwives. Challenges to providing GPC included scheduling and systems-level issues such as funding and regulation.

In promoting GPC, women would emphasize the philosophy of care to other women and the midwives said they would promote the reduction in workload and women's independence to colleagues.

GPC offers significant health benefits in comparison to traditional, one-on-one prenatal care. Women in GPC actively engage in their health care and experience a supportive network with one another.

The study collected data through three focus group interviews – two with women who had completed GPC at a midwifery clinic in Ontario, Canada, and one with the midwives at the clinic. Data was analyzed through open coding to identify themes.

quirks.com/articles/2014/20141101

••• seniors/mature

Seniors offer ideas to help them volunteer their time

As reported by Audrey Tan of *The Straits Times*, a Singapore focus group with senior citizens on volunteerism netted some helpful ideas for non-profits and other organizations looking to tap into seniors as a resource for volunteer help. Around 50 senior citizens discussed the problems they face in giving their time to a good cause and how to solve them during the two-hour session at the Social Service Institute at TripleOne Somerset.

As might be expected, some seniors said that physically-taxing experiences requiring them to stand or walk for long hours may not be suitable. Others called for some form of compensation or recognition. Participants suggested letting volunteers try out the activity before committing to it, as a way to ensure a good fit between the cause and the volunteer. Additional ideas included matching seniors to volunteer work near their homes and offering volunteer opportunities with more flexible schedules. And, instead of tying volunteers down to an activity on a particular day for a certain length of time, the participants suggested a system through which non-profit groups would access a pool of volunteers, so that volunteers who were unable to make it could easily be filled in for.

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By Joseph Rydholm, Quirk's Editor

Et tu, customer experience professionals?

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Joe Rydholm can be reached at joe@quirks.com

The research function periodically comes under siege from various forces. Decades ago, online surveys – with their non-representative samples and other supposedly fatal biases – threatened to destroy research's methodological rigor. Then SurveyMonkey and other DIY forms of research caused fear and loathing. More recently, big data and the wizards who claim to be able to tame it seem to be infringing on MR's turf.

Harnessing big data is still very much on the industry's to-do list but Eric Whipkey's article in this issue ("Insights in their sights") sounds the alarm that there may be another army coming over the hill to eat research's lunch or move its cheese (pick the food-related metaphor of your liking): customer experience professionals.

In a nutshell, Whipkey compares some of his takeaways from attending recent research industry conferences and a Forrester conference on customer experience. The CX people, Whipkey says, have figured out this seat-at-the-table thing and are using insights gleaned from research and other data sources to effect change within their organizations.

As he writes, ". . . CX researchers are taking this research full-circle. They actually strive to create complete closed loops from the consumer insight through to improvements in employee engagement, easier-to-use Web site navigation, easier retail shopping experiences, etc. In other words, they do not stop with insights."

Now, when I start offering up advice for how researchers need to be doing this or doing that, I do so with the knowledge that every situation is different. In some organizations, the research and insights function is barely given the time of day or is viewed as an afterthought or a cost center. Many of you are one- or two-person "departments" doing the work of 10 and don't have the luxury of learning to be data scientists in your spare time or otherwise expanding your skill sets on the job, to fend off the attacks from forces seemingly seeking to usurp your function.

And when I call attention to these types of threats, I'm also mindful of all of the great work that marketing research and insights people are doing. They are functioning as change agents, as drivers of strategy, as integral parts of their organizations' daily operations (all of which, BTW, was in evidence in the presentations I listened to at the Corporate Researchers Conference in Chicago in September).

But with the implications of the Eric Whipkey article bouncing around my brain, I tried to come up with some realistic strategies for researchers who want to fend off the CX or big data hordes and realized that another article in this month's issue offers some guidance, albeit indirectly.

The golden rules that Clarke De Pastino explores in his piece ("We're in this together") are aimed at brands and their relationships with their research community members but I was struck by how many of them, with a little modification, could be applied to researchers who want to fend off the CX or big data hordes. After each rule I've offered my spin to make it applicable to researchers:

Golden Rule #1: Demonstrate and deliver value (*Make sure your work is in the service of specific business outcomes and strategies.*)

Golden Rule #2: Build relationships (*Hone your elevator pitch so you can pique the interest of others in your organization who may not know much about what you do.*)

Golden Rule #3: Be transparent (*Don't hide behind black boxes or too much methodological rigor; acknowledge the strengths and weaknesses of the research processes you've used and invite dialog.*)

Golden Rule #5: Show impact (*Trumpet your successes in an internal insights blog, newsletter or intranet.*)

Golden Rule #7: Be entertaining (*Don't bore them! Know your audiences and their needs: use infographics for the time-challenged; put the implications up front and the methodology in the appendix.*)

Golden Rule #8: Communicate regularly (*Related to #2 and #5, what are you working on? What's got you thinking? Might a project you did for one internal group have relevance to another?*)

Good luck on the battlefield!

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IN FOCUS

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

// Survey Monitor

••• leisure research

Americans love their libraries

Women more likely than men to have a library card

A Harris Poll found that 66 percent of American adults are either extremely (24 percent) or very (42 percent) satisfied with their public library. This number represents a seven percentage-point increase from the 59 percent of Americans who indicated the same in 2008. An additional 20 percent are "somewhat" satisfied.

Unsurprisingly, those who have their own library cards are much more likely to feel extremely or very satisfied with their public library than those who do not have library cards (78 percent vs. 44 percent). Parental status also appears to be a factor when determining satisfaction. Parents are more likely than adults without children to be extremely/very satisfied with their public libraries (71 percent parents of children 18+ and 69 percent parents of children <18 vs. 62 percent non-parents).

A majority of Americans (64 percent) have confirmed that they have a library card, down from 68 percent of adults in 2008. Looking across demographics, when it comes to the great gender divide, women are more likely than men to have a library card (71 percent vs. 57 percent). Higher levels of education coincide with higher likelihood to have a library card. Adults who have completed a postgraduate degree are the most likely to have a library card (79 percent), followed by a near-tie between college graduates (67 percent) and those who have completed some college (66 percent). Americans who have a high school education or less are the least likely to have a library card (58 percent). Parental status also coincides with differences in likelihood to have a library card. Parents are more likely to own library cards than adults without kids (70 percent of those with children <18 and 68 percent of those with children 18+ vs. 60 percent of those without children).

When asked how important it is that a child have one of his or her own, 89 percent of U.S. adults believe it is important, with 56 percent finding it to be very important. Once again, gender differences hold strong. Women are more likely than men to consider it very important that a child have their own library card (61 percent vs. 49 percent). When it comes to education levels, postgraduates are the most likely to feel it is very important for children to have their own library cards (71 percent, vs. 51 percent college graduates, 62 percent some college and 49 percent HS or less). It is perhaps unsurprising that those who have library cards themselves are more likely to feel it is very important for children to have their own library cards (68 percent) than those who do not have library cards (33 percent).

Nearly eight out of 10 adults with library cards (78 percent) have used the library in the past year, while 21 percent have not. More specifically, 28 percent have done so one to five times, 15 percent six to 10 times, 17 percent 11-25 times, and 18 percent have used the library 26 times or more.

Parents of children under 18 are the most likely to have used the library six or more times in the last year (61 percent, vs. 43 percent parents of children 18+ and 49 percent adults with no children).

When shown a list of possible

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library activities and asked which were the top reasons they had used their library over the last year, the majority of Americans list borrowing hardcover or paperback books (56 percent), followed by DVDs/videos (24 percent) and digital content (15 percent, with 13 percent specifying borrowing e-books). Breaking it down by gender, it appears that women are more likely than men to use the library for borrowing e-books (15 percent vs. 9 percent) and attending a kids' reading or storytime program (7 percent vs. 4 percent). However, women are less likely to use the library to borrow CDs/music (7 percent of women vs. 12 percent of men), use reference materials (7 percent vs. 12 percent), and check email (5 percent vs. 14 percent), among other things.

Nine in 10 Americans (89 percent) feel it is important that a library be a valuable education resource, with the majority of adults specifying they feel this is very important (59 percent). Meanwhile, just over three-fourths of adults consider it existing as a pillar of the community to be important (77 percent). In addition, roughly seven in 10 Americans agree that it is important for the library to be recognized as a community center (73 percent), a cultural center (70 percent), and a family destination (68 percent). Finally, 65 percent of American adults believe it is important that a library should exist as an entertainment resource.

This Harris Poll was conducted online within the United States between July 16 and 21 among 2,306 adults (aged 18 and over), 1,476 of whom have library cards. Figures for age, sex, race/ethnicity, education, region and household income were weighted where necessary to bring them into line with their actual proportions in the population. Propensity score weighting was also used to adjust for respondents' propensity to be online.

••• mobile research

Pinterest rules the mobile social network world

Highlights from the Adobe Mobile Benchmark Report

San Jose, Calif.-based Adobe released its 2014 Mobile Benchmark Report, which analyzes the latest mobile trends including Wi-Fi versus cellular usage, the correlation of screen size and browser market share, the role of social networks across smartphones and tablets, content sharing across devices and more.

Selected findings include:

Mobile browsers: Market share for Chrome Mobile increased by 5.7 percent to 34.6 percent while Safari Mobile fell by 2.6 percent to 59.1 percent. Apple iPhone and iPad still drive the most mobile Web visits with 54 percent and 80 percent market share respectively. Samsung placed second for both browsing on smartphones (24 percent) and tablets (7 percent). With a 5 percent share, Amazon came in third for mobile browsing on tablets.

Screen size and mobile browsing: The iPhone 6 Plus's larger screen option came just in time, as the report indicates that without a larger-screen phone, Apple's mobile browser share would be expected to further decline. Phones with larger screens drive more Web traffic than ever before. Web browsing on four-inch or larger phones grew by 132 percent year-over-year while browsing on smaller phones (four-inch or less) decreased by 11 percent year-over-year. In addition, tablet browsing flattened and only saw a minor increase of 1.8 percent year-over-year.

Social networks across devices: Thirty-six percent of all referral visits from social networks to retail sites come from tablets and smartphones. Pinterest is the most mobile social network, with 64 percent of its referrals triggered via mobile browsers. Tumblr referrals drive the highest revenue per visit from mobile devices, 39 percent more than Facebook. In addition, bounce rates for referrals from social networks are higher on mobile devices than desktops, 61 percent versus 53 percent, respectively.

Access and sharing of content across screens: More consumers choose to access the Web via Wi-Fi. Over 50 percent of smartphone browsing and 93 percent of tablet browsing now come from Wi-Fi rather than cellular networks. In addition, mobile users are sharing more digital magazine content via text messaging than ever before. The use of Apple iMessage saw the strongest increase, with 259 percent year-over-year. Sharing content via Facebook is down by 42.6 percent.

iBeacons and geotargeting: In an accompanying mobile survey, Adobe found that iBeacons and geotargeting are becoming mainstream. Eighteen percent of mobile marketers already use iBeacons and the number is expected to double in 2015. Almost half of marketers (49 percent) use GPS positioning to reach mobile users with their brands. Thirty-three percent of mobile users take advantage of mobile-assisted in-store shopping.

Adobe's Mobile Benchmark Report is based on aggregated Adobe Marketing Cloud and Adobe Digital Publishing Suite data from 18 billion visits to more than 10,000 Web sites and over 700 million mobile app sessions. The accompanying mobile survey is based on interviews with over 3,000 mobile users and over 100 marketers of major U.S. brands. www.adobe.com

••• financial services

Gens Z and Y open up about their financial fears

Whoa is me

Facing worries of unemployment, diminishing Social Security benefits and an average student loan debt of $29,000, those in Generation Z (ages 15-24) understand the importance of saving. TD Ameritrade's third-annual Generation Z survey looked at what this generation is doing right and where there is room for improvement. The survey also polled Generation Y (ages 25-37) this year, to see how these two generations differ.

When asked, in an open-ended question, their biggest concern with today's economy, members of Gen Z were most likely to say jobs/unemployment. This was their biggest worry in 2013 as well. However, it appears to have diminished, down to 25 percent from 34 percent, mirroring, perhaps, the improvement in employment rate for the class of 2014.

Kaci F., a Gen Z intern for TD Ameritrade, shares this sentiment, "It's very difficult to find a job right now but I think the economy has been getting better. I think we have a better chance now than a couple years ago finding employment."

One shift that Kaci and others in her generation are experiencing is securing post-college internships rather than full-time jobs. "I think that will become the new norm," she says.

Brenna L., a fellow intern at TD Ameritrade agrees. "Employment right now so heavily relies on experience," she says, "and for our generation getting that experience and getting our foot in the door is the hardest, so people like us are interning in our 20s because we need that experience."

Jobs may be today's worry, but members of Gen Z have some future concerns on their minds as well. An increased number of those in Gen Z – from 39 percent in 2013 to 44 percent this year – fear that Social Security and other similar government retirement programs will be depleted by the time they retire. And, as the average student loan debt has continued to climb, it's no surprise that nearly half (44 percent) of those in Gen Z say they worry about having a large student loan balance when they graduate.

Despite fears of accruing too much student loan debt, the majority of those in Gen Z (72 percent) have attended, are currently in or plan to attend college. Additionally, 53 percent say they plan to pursue an advanced degree. That's likely because they increasingly believe that a college education is key to their success (60 percent feel it's very important, up from 54 percent in 2013). The older members of Gen Y are less likely to see college as very important (47 percent). However, among those in Gen Y who went to college, 51 percent still feel their college education was worth every penny invested.

A few, like Demarcus J., a recent Gen Z graduate and former TD Ameritrade intern, feel that there is value in gaining an advanced degree. "The bachelor's today is like getting a high school degree," he says. "You have to have it in order to be competitive in the job market. I think that having a master's gives you a more competitive edge."

As the average cost of a four-year degree continues to rise, most (65 percent) high school-aged Gen Zers expect to pay tuition with assistance from scholarships and grants. The reality, however, may be a bit different: Only 54 percent of post-college Gen Zers and 50 percent of those in Gen Y actually benefited from scholarships and grants.

Members of Gen Z (51 percent) report that their parents are the No. 1 resource for learning about finances. According to the survey, 84 percent of those in Gen Z say their parents discussed the importance of saving, on average, by age 14.

However these financial lessons are being taught, it appears that good financial habits are being formed. A few highlights of Gen Z's fiscal responsibility from the survey include:

- Those in Gen Z increasingly feel that saving is very important (57 percent) at this point in their lives, up from 50 percent in 2013.
- If handed $500, nine of 10 Gen Zers say they would save at least some of it.
- And their budgeting skills are improving with age, as 36 percent say they have a budget and follow it (up from 27 percent in 2013).

While members of Gen Z appear to be taking some good steps toward their financial futures, there are some areas in which they could use a little guidance. For one, it appears credit card debt increases with age. The average debt for college-age Gen Z: $559; for post-college-age Gen Z: $975; for Gen Y: $1,946.

Furthermore, fewer members of Gen Z surveyed in 2014 (43 percent) say they pay off their credit card bills monthly compared to 2013 (59 percent).

So what does the future hold for Gen Z? Nearly half (49 percent) of those surveyed say they have moved out or plan to be out of the house by age 20, while only 40 percent of those in Gen Y say that they moved out by age 20.

Like last year, those in Gen Z say the age they'd be embarrassed to still be living at home with their parents is 28. But, Gen Y wouldn't feel so until age 31, on average. And what's more, 17 percent of Gen Y survey respondents say they wouldn't be embarrassed until age 40 or even older.

Whenever they leave the nest, Gen Z wants to find a job that inspires them with the vast majority (74 percent) saying that feeling inspired by their work is more important or equal to the salary they earn. They are also looking for a job that allows them to make a positive contribution to society (59 percent). Thirty-six percent of those in Gen Z would prefer to be self-employed/entrepreneur, rather than traditionally employed.

Whatever the future holds, most Gen Zers say they plan to start a job, buy a car, pay off student debt, get married, buy a home, THEN begin saving for retirement – in that order. On average, Gen Z believe the right age to start saving for retirement is 27. "I don't think my generation really thinks about savings like we should," says Caitlin N., an intern for TD Ameritrade. According to the survey, only one in five Generation Z respondents say they are currently saving for retirement.

And, how does Gen Z plan to go about saving for retirement? Just 17 percent believe that the best way to plan for retirement is to invest in the stock market. While that's up from 11 percent a year ago, many more (47 percent) believe that a savings account is the best way to prepare for retirement.

The survey found that only 10 percent of those in Gen Z report learning financial lessons from a teacher or course at school. Many Gen Z respondents (42 percent) report they have not taken a class about investing, largely because there were no classes available (40 percent).

An online survey was conducted among 1,000 U.S. residents born between 1990 and 1999 (Gen Z) and 500 U.S. residents born between 1977 and 1989 (Gen Y) from April 30 to May 12, by Head Research on behalf of TD Ameritrade Inc. Sample was drawn from major regions in proportion to the U.S. census. The statistical margin of error for the total Gen Z sample is +/- 3.1 percent (assumes responders are the same as non-responders and that panelists are the same as non-panelists).

••• sales research

Inertia rules among users of sales management programs

We've fallen and we can't get up

Findings from the 2014 Sales Compensation and Performance Management Report by Boulder, Colo., researcher CSO Insights show that even respondents who gave a B grade to their firm's current compensation/incentive management program cited major differences in rep quota attainment and the ability to deliver timely and accurate metrics to managers, among other factors.

This year's report asked survey respondents to grade their current compensation/incentive management program, explain the main reason for the grade given and, among those who gave it a lower grade, the main obstacle to changing. Of 850 firms responding to the survey, 37 percent gave their current plan a grade of C, D or F.

Tied for main reasons perpetuating the current systems – despite low grades – were a lack of staff expertise to introduce a more effective program and/or senior management having no interest in modifying the design philosophy.

"You might fear a rebellion by sales reps when changing the compensation plan design but only 6 percent of firms offered this as the most compelling reason to maintaining the status quo," says Barry Trailer, managing partner at CSO Insights. "Also of note, while 24 percent of respondents reported senior management had no interest in changing, less than half this figure [10 percent] said sales management had no interest in changing."

The report also found: the percentage of reps "actively engaged" in their jobs fell 10 percent; selling to new accounts continues to be the area compensation plans most emphasize; 90 percent of all firms consider providing managers with timely and accurate rep performance metrics mission critical/very important but only 5.5 percent of firms exceed expectations in doing so.

While 90 percent of firms report that providing their managers with timely/accurate performance metrics is very important or mission critical, 49 percent say they need improvement in doing so. The firms that exceed expectations in this regard also outdistance those needing improvement in vital areas, including the percentage of reps meeting/beating quota (59 percent versus 50 percent), lower total rep turnover (16 percent vs. 20 percent), and coaching with CRM data as opposed to data kept separately by managers.

The report details the shift from lagging to leading indicators and firms' ability to get performance metrics to sales managers. Fundamental to having this ability is moving off spreadsheets and leveraging systems now available, yet half of all companies and one-third of companies with annual revenues over $1 billion continue to rely on spreadsheets as the basis for managing territories and compensation.

Asking participants to rate their compensation plan was new to this year's survey and the performance measures support the grades people were giving. "A" players did better overall and in specific measures than others, "B" players did better than "Cs" and down the line. The data make clear that lower grades reflect lower performance, the likelihood of falling further behind competitors, and calls into question why firms recognizing their shortfall staunchly resist changing.
www.csoinsights.com/publications

••• consumer psychology

How to earn a second chance at making a first impression

Tie the experience to a different 'first'

Most people agree that first impressions are important. New research shows that you can turn a run-of-the-mill experience into an influential first impression, simply by making it seem like a first. For example, a person's seventeenth visit to a neighborhood coffee shop might normally be unlikely to alter her opinion of that shop much. However, the research finds that when that visit is linked to an unrelated "first" – maybe the first visit of the month, the first visit after starting a new job or the first visit during a special promotion – a mental "reset" button is pushed, leading that visit to have a larger impact on people's impressions, just like a true first visit would.

This research, by Robyn LeBoeuf, Elanor Williams and Lyle Brenner, which appeared in the *Journal of Marketing Research* ("Forceful phantom firsts: framing experiences as firsts amplifies their influence on judgment") suggests that you can turn an experience into a meaningful first impression in a variety of ways. In one study, people read descriptions of five visits to the dentist. The fifth visit had a greater impact on impressions of the dentist when that visit was the "first" one after the presidential election (versus when it happened "near" the election). In another study, people read six hotel reviews, similar to those on travel Web sites. The final review was more influential when it was the first review of the year versus just another review.

"By connecting an everyday experience to a first, even an unrelated first, you can turn that experience into a first experience," say the authors. "Customers may evaluate their old standby restaurant in a new light after the first dinner since they moved into a new house or if the manager welcomes them to 'the first dinner of the summer.' This may allow familiar products – and even people – a chance to make a fresh impression."

Thus, if your co-workers or customers have a poor impression of you or your product, all is not lost. Look for a positive experience, and when you find one, connect it to a first, by pointing out that it is, say, the first meeting after vacation or the first shopping trip of the season. This can give you a second chance at that first impression.

••• brand research

Video helps consumers bond with brands

They like to watch

In research from Brightcove, a Boston provider of cloud services for video, 76 percent of consumers cited video as their preferred content source when consuming brand information. The study, which questioned 2,000 consumers globally, highlights that 79 percent of consumers favor digital content over traditional, with 12 percent preferring to consume content from brands on their smartphone, tablet or mobile application.

Almost a quarter (24 percent) of the consumers surveyed said video is their "most trusted" source of brand content. Explaining their choice, 44 percent said video was more "appealing" to them, while engaging (28 percent), authentic (29 percent) and sharable (10 percent) were also cited as reasons for trusting video content over other forms of brand communication.

In addition, over a third of consumers (35 percent) cited brand video content as more memorable if it is of high quality. The research found that when consumers had a good video experience: almost four in 10 (39 percent) were more likely to research the brand or product further; a similar amount (36 percent) were more likely to tell friends and family about the brand; three in 10 (30 percent) said they were more likely to become brand loyal; and just under a fifth (19 percent) said they were more likely to share content from that brand on social media.

When asked how their branded video experience could be improved, three of the top four consumer responses related to video delivery – better quality streaming (32 percent), faster launch times (31 percent) and less buffering (30 percent) – showcasing that consumers are really now focused on the experience that is being delivered to them, end-to-end.

For the study, an online survey of 2,000 consumers was undertaken in August in the U.S., France, Germany and the U.K. The survey was set up and completed by Vanson Bourne.

••• e-commerce

Nielsen study profiles 30,000 Asian online shoppers

What's moving in Asia?

From computer software to travel-related services and products, the preferences of Asia's online shoppers are changing rapidly, a survey of 30,000 consumers by marketing research firm Nielsen showed.

As reported by CNBC's See Kit Tang, Asians are the most active online shoppers globally, according to the study; clothing, flight tickets and hotel bookings are their most popular purchases. This is compared to 2012, when mobile phones and computer and gaming software were the most popular purchases.

Singaporeans topped the list of consumers purchasing travel-related products and services globally; 70 percent plan to book flight tickets or hotel reservations online within the next six months. Malaysia ranked second globally for booking tours and hotel reservations online and third for booking airline tickets, subsets of travel-related products and services.

"The travel industry is one of the more advanced sectors when it comes to e-commerce platforms," said Connie Cheng, executive director, shopper in Southeast Asia, North Asia and Pacific at Nielsen in an e-mail to CNBC. "Within Southeast Asia, Singaporeans and Malaysians are among the most inclined to channel their spare cash toward holidays."

Non-durable goods are gaining traction in Asia's e-commerce space, with China and South Korea leading the way. Their intent to purchase cosmetics and groceries online exceeds the global average by 20 percentage points each.

Baby-related products are also popular online purchases in China, with diapers and infant formula constituting more than half of such purchases.

"The lightning-fast pace of change in the digital landscape has ushered in a consumer mind-set that is both adventurous and exploratory," said John Burbank, president of strategic initiatives at Nielsen in a note. "Consumers everywhere want a good product at a good price and the seemingly limitless options available in a virtual environment provide new opportunities."

Personal computers remain the preferred platform for Asia's online shoppers except in Thailand where mobile phones are preferred. Tablet usage is also gaining traction, with above-average usage for online purchases in all Southeast Asia markets except Singapore.

"Asia is the furthest down the e-commerce maturity curve," said Nielsen's Burbank. "In Asia-Pacific, tech-savvy consumers have already embraced the convenience of online shopping. Attracting new buyers using mobile could be an accelerator in the developing markets as it provides greater access to more people faster."

Asia's e-commerce market is expected to hit $1.47 trillion by year-end, up 20 percent from 2013, according to data from eMarketer. But credit card security could become an obstacle for growth, especially in Southeast Asia.

Concerns about providing credit card information run high in Asia; five of the six Southeast Asian markets Nielsen surveyed ranked above the global average on this front. Filipinos are the most cautious, with 67 percent indicating a lack of trust with online payment, followed by Thais (62 percent), Indonesians (60 percent), Vietnamese (55 percent) and Malaysians (52 percent). Globally, the average is 49 percent.

"Concern around providing credit card information online remains a barrier to purchase, however, and providing reassurances around online payment security is essential for online retailers in order to gain the trust of consumers," said Cheng.

IN FOCUS

Product and Service Update

••• health care research

Kantar creates panel of consumers with disabilities

Aims to uncover unmet needs, accessibility challenges

Research company Kantar is partnering with nonprofit research organization disABILITYincites to create a U.S. panel of consumers with disabilities and use results from it to produce a research study on the unmet needs of these consumers. Set up and run by Kantar-owned Lightspeed Research using a sample of 5,000 people with disabilities, the study has two aims: to examine the segment's consumption behaviors, unmet needs due to accessibility challenges and other areas of focus never measured before that depict the disability journey; and to yield insights that inspire manufacturers and other service providers to create new products and services that enable people with disabilities to live more independently while following their ambitions. At press time, preliminary study results were due to be released this fall. All study results will be made available by mid-2015 to commemorate the 25th anniversary of the passing of the Americans with Disabilities Act.
us.kantar.com

quirks.com/articles/2014/20141104

••• qualitative research

New book offers guide to Web-based interviews

Covers tool, costs, planning

Jennifer Dale of Inside Heads, a Virgin Islands research firm, and Susan Abbott of Toronto-based Abbott Research and Consulting have co-authored *Qual-Online, the Essential Guide*, designed to help marketers and researchers understand the processes of conducting and moderating Web-based interviews. From learning about the types of tools available to planning an online study, the book is designed to help readers understand the sequence of steps to follow, the timing and the costs involved. It will also help manage the insights gathered, to make the job of sharing information with clients easier and make reports more robust.
www.paramountbooks.com/qual-online-essential-guide

••• customer experience

Clarabridge adds speech analytics component

Analyzes variety of call-based material

Washington, D.C., software company Clarabridge, partnering with Pittsburgh firm Voci Technologies Inc., has expanded its Clarabridge Speech solution by adding a speech analytics component. The change is aimed to provide access to multiple sources of customer feedback, including surveys, agent notes, social media, chat, voice, e-mail and warranty notes. Clarabridge Speech transcribes and automatically analyzes customer call recordings, including service calls, phone-based marketing research or after-call surveys for a holistic view of the customer. The call data is combined with call center agents' notes and other customer data. The voice and meaning is interpreted and paired with other feedback. Collectively the customer feedback is processed using natural language processing, industry specific categorization and sentiment scoring to analyze the complete voice of the customer, find actionable insights and use them effectively.
www.clarabridge.com

••• hybrid research

AcuPOLL system mixes qual, quant

Uses iPads to enable mobility

Cincinnati research company AcuPOLL has launched AcuPOLL Live Qual/Quant on iPads, a customized system designed for use in moderated group sessions. The system aims to capture answers to closed-ended quantitative questions via the iPads. It is also designed to orally gather answers to open-ended qualitative questions along with ratings of the answers, allowing clients to understand the level of agreement across the group, eliminate group bias and know how everyone in the group feels. Researchers can: test in-context in restaurants, bars, laundromats, playgrounds, test kitchens and retail; get insights from Millennials and teens on the platform where they're comfortable and engaged; and have the flexibility and capacity to test more than a dozen campaign elements in one session.
www.acupoll.com

••• mobile research

Report charts mobile path to purchase

As age rises, tablet demand falls

Tucson, Ariz., researcher Communicus has published its report, The Mobile Device Path to Purchase: Parents & Children, which aims to examine how parents and children purchase and use mobile devices. The study showed that two-thirds of pre-kindergarten-age children use tablets, with one-third owning their own tablet. The report also revealed that demand for cell phones increases as the child gets older but tablet demand decreases once the child reaches tween-age, defined as ages 10 to 12. Between July 7 and July 17, Communicus interviewed over 2,000 adults and nearly 1,400 children ages 6-17 for the study. Children were grouped as pre-K (ages 2-5), kids (ages 6-9), tweens (ages 10-12) and teens (ages 13-17).
www.communicus.com

••• health care research

Advisory team will help researchers work with patients

Conditions include lupus, epilepsy and MS

PatientsLikeMe, a Boston health research firm, has formed its first patient-only advisory team comprised of volunteers from medical patients in its member forums. The team is designed to provide feedback to the PatientsLikeMe research team on research initiatives and will develop a guide outlining standards for researchers wanting to engage with patients. The current team members range in age from 32 to 67 years old and include veterans, nurses, social workers, academics and advocates. Their conditions include bipolar disease, epilepsy, fibromyalgia, lupus, depression, multiple sclerosis and Parkinson's disease.
www.patientslikeme.com

••• health and beauty research

Kline debuts report on the sexual wellness market

A market on the rise?

Kline & Company, a Parsippany, N.J., research firm is offering a new study, Sexual Wellness: U.S. Market Analysis and Opportunities, which assesses the market for personal intimacy and enhancement products. Once the domain of small, dark specialty shops and obscure Web sites, sexual wellness products can now be found in many drug stores and mass merchandisers. Reputable chains like CVS, Walgreens and Target boast larger and more complete intimate health sections which feature not only condoms and pregnancy kits but also playful lubricants, intimate massagers and sexual enhancement supplements from brands like Extenze and Zyrexin.

Multinational consumer goods company Reckitt Benckiser has taken a front seat in the sexual wellbeing category following its acquisitions of Durex condoms in 2010 and K-Y personal lubricants in 2014. The Durex product lineup has since exploded to now offer an array of intimate lubricants and massagers. "We believe that intimate well-being is an essential category that, although often burdened with some social stigmas, offers a lot of opportunities as well," says Aurore Trepo, a spokesperson from Reckitt Benckiser. "We are excited to see the results of this new study from Kline to help us better understand how to best respond to consumer and market needs."
www.klinegroup.com

••• shopper insights

20|20 adds virtual reality tool

Can change depending on user demographics, behaviors

20|20 Research, Nashville, Tenn., has launched its 20|20 virtual reality (VR) program, which is designed to allow respondents with VR headsets to experience a computer-simulated environment. The program aims to replicate a variety of in-store environments, locations or events and to use eye-tracking to determine which items attract the most attention. The tool is designed to change the store settings, conditions, pricing and product configurations instantly, depending on the user's demographics and behaviors.
www.2020research.com

••• data analysis

IBM offers help tackling big data

Watson wants to work for you

IBM, New York, has launched a B2B analytics tool, Watson Analytics, designed to provide a full range of self-service analytics, geared toward making the acquisition and preparation of data for analysis and visualization easier

for business users. The new service has been designed to automate areas such as data preparation, predictive analysis and visual storytelling. Available as free and premium services, Watson Analytics is a natural language-based cognitive service that offers access to predictive and visual analytic tools for companies. Companies can upload their data and start querying it and start discovering patterns, trends and perform predictive analytics on their data.
www.ibm.com

●●● Briefly

■ London research firm E-Tabs has launched a data visualization design blog, aimed at addressing good design examples, interactive dashboards, design theories and innovations, focusing on application within the market research industry. Both original and referenced content will be included.
www.e-tabs.com

■ Chennai, India, researcher Krea has launched a specialist diabetes panel, DIAB+, with opinion leaders, endocrinologists, diabetologists and clinicians as members. A second database includes nurses and patients.
http://krea.in/panels

■ McLean, Va., software firm Logi Analytics has updated its Vision data discovery software to Logi Vision 1.3, adding social activity streaming, mapping and binning capabilities.
www.logianalytics.com/vision

■ Pennington, N.J., researcher G&R has added Mobile Tip-In to its toolkit of in-context copy testing and pre-testing methodologies.
www.gandrllc.com

■ EyeSee, a Ghent, Belgium, researcher, has partnered with the Smurfit Kappa packaging company, Dublin, to create an online tool to allow brand owners to test the impact of packaging in a virtual store environment before the product is launched. The tool is designed to depict packages on a virtual supermarket shelf and to monitor eye-tracking results through a Webcam. Analysis of the results reports how the item stood out, was remembered and drew shopper interest in the product.
www.eyesee.be/about.php

■ NetBase, a Mountain View, Calif., researcher, has launched its targeting tool, Audience Marketing with micro@scale advertising. The tool is designed to create a detailed segmentation of an audience by examining customer gender, geography, lifestyle and interests. The micro@scale advertising component then aims to target the individuals who match the desired social profiles. The tool is now available as in beta mode to selected customers.
www.netbase.com

■ Boston technology firm BlueConic has launched a mobile app listening tool, designed to track customer behavior and purchases within a mobile app. The activity is then synced with the user's profile from prior e-mail, Web or in-store interactions with the brand.
www.blueconic.com

■ ComScore Inc. has expanded the release of its Media Metrix Multi-Platform and Mobile Metrix products to five additional countries including Canada. It was launched in the U.S. and U.K. last year.
www.comscore.com/products/audience-analytics

■ Krux, a Skelleftea, Sweden, marketing firm, has integrated the NetAcuity Edge ad targeting software of Digital Element, a Norcross, Ga., technology firm, into its services. The addition is designed to allow clients to segment audiences, geographically target advertising and localize Web site content.
www.digitalelement.com/netacuity

■ Bangalore, India, research firm Borderless Access has launched a proprietary community and panel management platform, Communisense, designed to ensure higher response rates and to help clients understand and predict panelist behavior across recruitment, engagement, sampling and incentive management.
communisense.borderlessaccess.com

■ In London, the Broadcasters' Audience Research Board (BARB) has added a measurement technique to include panelists using iPads and tablets. The addition, developed by Kantar Media, will first be used in BARB panel homes that currently have a software meter installed for tracking desktop and laptop computer viewing.
www.barb.co.uk

■ Adknowledge, Kansas City, Mo., is partnering with Realeyes, a London technology firm, to incorporate emotional analytics in its online video campaigns. The analytics platform uses Webcams on participant devices to measure how the audience members react to video content and is designed to provide advertisers feedback on how audiences respond emotionally to video campaigns.
www.adknowledge.com

■ Adaptive Insights, a Palo Alto, Calif., software company, has released its Suite 2014.2 software. The software includes an Adaptive Integration feature, designed to provide data integration, transformation, data staging and scheduling as a cloud service. Also released is the Adaptive OfficeConnect software, designed to blend cloud-based reports with Excel, PowerPoint and Word reporting sheets.
www.adaptiveinsights.com

■ Oslo, Norway, researcher Confirmit has launched its Confirmit Panel App, designed to allow researchers to provide an easy mobile experience to

their panel participants. The app provides participants with functionality for registration, profile management, tracking reward points and the ability to pause and resume surveys. It is available through the Apple App Store and Googleplay.
www.confirmit.com

■ New York researcher Gazelle Global has launched GoSample!, a standalone online sample solution designed to provide multiple engagement points to reach potential sample candidates. It is geared toward users with their own survey capability.
www.gazelleglobal.com

■ Philadelphia researcher Neustar has launched AK Media Insights Pro, a media intelligence service designed to allow marketers to experiment with custom marketing attribution models, using their existing business intelligence to test what-if scenarios.
www.neustar.biz

■ Passenger has integrated the social platform of LoginRadius, Edmonton, Canada, into the Passenger FUEL Community Engine. The move is designed to provide more power to brand managers and marketers working to create social media interest to support brand messaging, promotions or new products.
www.thinkpassenger.com/fuelcommunity

■ New York researcher Nielsen has launched the Nielsen Store – Europe, a Web site offering reports for purchase and immediate download. They include data reports on FMCG products as well as manufacturer reports.
http://store.nielsen.com

■ The designers at Palo Alto, Calif., technology firm Speaktoit, who created the virtual assistant Android app of the same name, have now launched Api.ai, a natural language-understanding software designed to allow developers to voice-enable apps and devices. The Api.ai handles requests in plain text as well as voice files and provides an iOS and Android SDK.
www.speaktoit.com

■ Montreal researcher iPerceptions has released the iPerceptions Marketing Effectiveness Solution, a digital research solution. It is designed to evaluate how paid search, display and social media and e-mail marketing influence attitudes toward the brand. The solution aims to leverage the iPerceptions Active Research Platform, which engages customers at the moment they interact with the brand.
www.iperceptions.com

■ Phoenix researcher iCrossing has introduced Responsive Audience Intelligence, an online tool designed to match online visitors with a marketer's targeted consumer segment by the visitor's age, gender, income, education and interests. The tool then aims to provide contextual site copy and landing page content in real time.
www.icrossing.com

■ Vancouver researcher Insights West has launched an online community, YourInsights Multicultural Panel, composed of 2,100 British Columbian residents of Chinese and South Asian ethnic descent. The panel is designed to handle online surveys in English, traditional and simplified Chinese and to accommodate specifications for various demographics, including length of time in Canada, country of origin and language.
www.insightswest.com

■ New York software company Neuromatters has released Cognitive Capture, a tool using electroencephalography to take a new measure, inter-subject correlation, which is designed to measure and predict audience attention. The technology is also geared to analyze peaks and valleys of attention within an ad.
www.neuromatters.com/cognitive-capture

■ New York researcher Nielsen will launch its Nielsen Social solutions in Mexico in the first half of 2015. Nielsen Social solutions include Nielsen Twitter TV Ratings and are designed to identify, capture and analyze Twitter conversations in real-time.
www.nielsensocial.com

■ Australian airline Qantas has launched a data marketing business, Red Planet, which will analyze data from its 10.1 million Frequent Flyer loyalty program members and offer targeted advertising and research to other companies. It will also utilize data from the Qantas Shop division, credit cards and employee rewards programs. Quantas will move its digital media spending to Red Planet, which will also handle media campaigns for some clients. The Red Planet staff includes members of the Frequent Flyer analytics team as well as new hires with media background.

■ Research Partnership, London, has launched an "innovation institute" program across its six offices, designed to encourage employees to examine its research methodologies, output delivery and internal processes and to create innovations and improvements.
www.researchpartnership.com

■ Detroit research firm Gongos Inc. has launched its third business unit, Arti|fact, aimed at providing "insight curation," described as preserving, sharing and positioning the knowledge inside an organization.
www.gongos.com

■ Netherlands-based software firm Nebu has launched a new Web site (nebu.com), designed to provide resources to clients, sales prospects and partners with case studies, articles and a single point access.

Inter-rater reliability and coding consistency

| By Katie Eddy and Natasha Elsner

snapshot

The authors outline their firm's efforts to check internal coding practices on a project involving a health care client.

quirks.com/articles/2014/20141105

In market research, time and budget figure heavily in establishing the research method. Efficiencies typically involve negotiating trade-offs between cost, quality and time.

Using multiple coders for open-ended survey responses is a fielding efficiency that our firm, the HSM Group, uses for large, ongoing health care research projects with semi-structured interviews. For our B2B research, in-house researchers conduct telephone interviews and then code open-ended comments, enabling analysis-ready data capture. And while all interviewers are trained in the subject area, we understand that discrepancies can occur among even the most intensively-trained coders due to the subjective nature of interpreting and classifying open-ended responses. We pay careful attention to the quality of verbatim coding and review coded responses on a regular basis. A more systematic way to assess the quality of response coding is by measuring inter-rater reliability, which we recently undertook to gauge the group's collective accuracy.

Inter-rater reliability (IRR) is a measure of the level of agreement between the independent coding choices of two (or more) coders (Hallgren, 2012). It determines consistency of coding and can be used to establish the deviation of a coder's choices from the ideal or "true" codes (where "true codes" are those that garner general consensus among multiple coders). There are a variety of statistics which can communicate a measure of inter-rater reliability but one of the most common (and most appropriate for the study in question) is Cohen's kappa coefficient. Cohen's kappa is considered one of the most robust measures of IRR and is used widely in scholastic work (Carletta, 1996). It is calculated based on the percent consistent between two or more coding collections and accounts for the possibility of chance consistency.

Possible kappa scores range from -1 to 1, where -1 establishes absolute and perfect disagreement, 0 indicates no discernible pattern in code agreement, and 1 indicates "perfect agreement," where there is no difference between the coding choices of two (or more) coders (Hallgren, 2012). Social scientists generally accept that in any given research undertaking, achieving a perfect score of 1 is highly unlikely in the first place and becomes even less likely as code choices and interview responses increase in complexity and variability. With this in mind, scholars have established several guidelines by which researchers can evaluate their coding consistency. According to Landis and Koch (1977), a kappa coefficient between 0.61 and 0.80 establishes substantial agreement, while any kappa of 0.81 or above can be viewed as "near perfect" agreement. And while 0.80 is viewed by many as a cutoff point for the viability of data (Hallgren, 2012), in practice, kappa coefficients below 0.80 are often still accepted in both academic and market research studies. J.L. Fleiss (1981) employs a guideline where a kappa of 0.75 indicates a proper cutoff point and where anything above 0.75 should be viewed as an "excellent" level of agreement.

HSM has kept these guidelines in mind when evaluating the quality of our verbatim coding. We felt that with our knowledge of the health care industry and our experience conducting research in this field, it should be possible to exceed industry standards.

HSM maintains many ongoing research

projects for a range of clients. In the spring of 2014, we felt it was time to analyze our own inter-rater reliability to make certain that an "excellent" or "near perfect" level of agreement was being maintained for a long-time client. For this exercise, we compared each of our individual coding choices with an ideal code: This code was determined in consultation with our client and, therefore, most accurately reflects the thought process and mind-set of that content expert. Factoring in the probability of agreement due to chance, we found that we had achieved a kappa coefficient of 0.92 for this particular project. This score reflects our measured accuracy across four possible response-code options for a single question. This analysis was performed on a sample size of 298 interviews, which represents three months or one-quarter of our annual data collection for this client.

Discrete and independent

Fundamentals of survey design dictate that for single-choice questions, response categories should be mutually exclusive and collectively exhaustive. Translating this principle to multiple-response questions and to codes for open-ended comments suggests that response categories should be discrete and independent of each other to the extent possible. Researchers are aware, though, that even discrete codes have unique relationships with each other.

In health care, complexities abound where issues are intimately related to and affected by other (seemingly disparate) phenomena. For example, one set of comments might present the idea of patient satisfaction separately from the idea of quality reporting and yet in other sections of text they may appear as embedded concepts, since patient satisfaction is included in CMS quality metrics.

Therefore, developing codes or response categories truly independent of one another without recognizing those inherent relationships would not do justice to the complexity of the issues at hand. Particularly in health care, where government regulations, payment structures and delivery systems all tend to inform each other, HSM has chosen NOT to create firm boundaries between these interlocking topics.

Rather, in recognizing that the complexity of these relationships has the potential to decrease coding consistency, we conducted further analysis of the 43 codes used for the open-ended question under review and identified 12 sets of codes where topics: relate as a function of part-versus-whole; relate as cause and effect; and contain related or similar concepts.

As issues discussed in the interviews continue to increase in complexity and code meanings shift in tune with changes in the health care landscape, creating new codes, revisiting existing codes and being mindful of the interconnectedness of topics should be an ongoing collaborative effort between the market research team and its clients. At the same time, in dealing with broad interview questions, which lend themselves to a wide array of coding options, we anticipate that discrepancies in coding will inevitably occur. This is not an anomaly but an expected component of qualitative data, especially where 20 or more codes are in play at a time, which is atypical of the standard market research open-ended question but was the case in this study.

As always, the interests and needs of the clients should be paramount. We value our clients' thoughts and opinions on code development and overall research strategy and want to involve them in the research process. Measuring and monitoring inter-rater reliability is just one way we as research suppliers can validate the quality of our work.

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MULTIMODAL DATA COLLECTION CAPABILITIES: IN-PERSON, INTERNET, MAIL, MOBILE, TELEPHONE global research

Designed with you in mind

How to create high-potential global marketing messages

| By Scott Garrison and Jet Kruithof

snapshot

A meta-analysis of marketing messages across the U.S., Europe, Asia and Latin America found that effective global campaigns share similarities but they also have crucial differences.

quirks.com/articles/2014/20141106

At the core of every effective marketing message is a truly resonant value proposition, one that is articulate and compelling. That tenet holds true no matter where in the world a message is propagated. But what resonates as a "true value proposition" can differ based on the geographic and cultural context in which it is being shared.

As part of a recent meta-analysis conducted by the marketing research consultancy SKIM, researchers set out to discover how four key characteristics of effective messaging perform in select global markets. Those characteristics are: promise value; emphasize the key benefit first; be specific; and create differentiation. It is generally understood that by writing messages that include these four characteristics, marketers can boost the likelihood of a message performing strongly in the market. However, with more brands and products acting on a global scale, it bears asking how these four common characteristics can be most effectively applied to messaging across differing markets.

Building on previous results of a meta-analysis of messages in Western Europe and the U.S., SKIM conducted a follow-up study of messages in Latin America (covering countries including Brazil, Argentina, Colombia and Mexico) and Asia (covering China, India, Thailand, Philippines, Indonesia, Vietnam and Japan). The results confirmed there are indeed similarities, providing the possibility for developing global messages that resonate in different countries around the world. However, the analysis also uncovered important differences among consumers in the regions. There are certain opportunities for creating effective marketing messages by specifically leveraging Latin American and Asian consumer preferences but there are potential pitfalls that need to be avoided as well. Global brands should be aware of these differences and similarities in order to create effective messages in these markets.

A winning messaging strategy

SKIM's meta-analysis examined more than 5,000 marketing claims in four categories including personal care, food, health care and laundry/household care. Through multivariate analysis techniques, researchers were able to uncover valuable insights into how to develop a winning messaging strategy.

SKIM created 41 codes representing hypothetical drivers of message effectiveness. In order to construct the codes, previous studies were examined to identify patterns, such as the fact that fluffy messages always seemed to be outperformed by those that include tangible benefits. Thousands of open-ended responses provided a vast amount of feedback that helped the researchers better understand how consumers react to certain characteristics. All of the messages were coded and analyzed to identify the key drivers of success. To ensure the validity of the results and to avoid any discrepancies in the coding and analysis process, every message was coded separately by at least two individuals. For all messages, inter-coder consistency was computed and inconsistencies were resolved by having the coders agree upon the interpretation of the code.

Tie value propositions to regionally-specific needs. The essence of a strong message is the promise of value by means of expressing benefits that help the consumer reach a desirable end state; thus is its defining point of difference. By including clear and tangible benefits, consumers are able to determine what value the product offers. Mentioning multiple benefits is a powerful way to further drive message appeal but it is crucial to be specific and not to over-promise on things that cannot be delivered.

The promise of value is the essence of a winning marketing message, so it is no surprise that this rule holds true across all regions and countries. However, one must evaluate which specific benefit to communicate in each region or country. Consumer needs and desires can differ and therefore a message in Asia may focus on a different benefit than a message in Latin America. For example a shampoo might promise smooth and shiny hair in messages targeted at Brazilian women, while the same shampoo may focus on "more volume" messages targeted at Chinese women simply due to differing needs:

Brazil: *To promote the growth of smoother and shinier hair*
China: *For thicker, more resilient hair*

Promising value to consumers is essential in creating effective messages, regardless of where in the world the messages are being utilized. However, as the needs and desires of consumers differ by region, the specific benefits that are addressed can, and often should, be customized for each set of consumers.

Emphasize the key benefit first. When there's only a split-second to capture attention, it is important to mention the key benefit first. By doing so, marketers grab the attention of consumers by ensuring consumers are focused on the main value promise. Claiming that a computer now offers "faster loading time, with our most advanced technology" is more effective, as it offers the key benefit of faster loading time first, instead of claiming that "Our most advanced technology now provides faster loading time."

Key benefit first: *Faster loading time, with our most advanced technology*
Key benefit last: *Our most advanced technology now provides faster loading time*

Some consumers may have already lost interest by the time they have finished reading about the most advanced technology in the latter claim and thus never realize it offers the benefit of faster loading time.

Be specific. Consumers prefer messages that are specific in the sense that the primary benefit is explained well and that it states exactly and unambiguously what the product delivers. One way to make a message specific is by including both words and numbers that enhance the promise. "98% less hair fall" or "2x damage repair" can be more powerful than simply claiming less hair fall or better damage repair, as it explicitly demonstrates how effective the product is. In addition, including descriptive adjectives that bring the benefit to life also has a positive impact in creating strong messages. The meta-analysis revealed that consumers across all countries prefer messages that specifically demonstrate what it will deliver. The mechanics of making messages specific (numbers, words, descriptive adjectives) are all equally valued across different regions, providing an opportunity for consistency in marketing.

Create differentiation. When considering the previous three characteristics of effective marketing messages, it may appear that there are more similarities than differences across countries and regions when developing global messages. However, SKIM uncovered important differences in the ways that marketers can create differentiation from competition.

In today's marketplace, every product is being measured against a set of alternatives. Rarely, if ever, is a product alone on the shelf. Therefore, it's important to position a brand or product by implying that it offers greater value than the competition. Claiming to be unique (e.g., promising unique benefits or unique technologies) is essential for brands globally. However, the methods for creating this differentiation must be adapted based on the region in order to resonate with consumers.

One of the most common methods of creating differentiation is through the use of comparative messages. These messages can create a comparison against an entire category, a key competitor or even against an older version of the same product. The research conducted by SKIM shows that comparative messages without a benchmark work better in Asia but not better or worse than non-comparative messages in Latin America, the U.S. or Europe. As an example, consider the following two messages about anti-dandruff shampoos:

Asia: *80 percent less dandruff in only two weeks*
U.S., Europe, Latin America: *Visible decrease of dandruff in half the time compared to regular shampoos*

Consumers in Asia have a preference for the first statement, which creates a comparison but neglects to benchmark it against anything specific. However, consumers from Western Europe and the U.S. would most likely reject the claim because its comparison is not defined and concrete; they might even consider this statement to be too fluffy and exaggerated. On the other hand, the second statement contains a defined and explicit comparison versus the category, which is valued by consumers in Western Europe, the U.S. and Latin America.

However, this type of claim represents a potential turnoff for Asian consumers, as Asian consumers might perceive such a message as being offensive toward other brands.

Therefore, in order to claim uniqueness, it is best to focus on comparative messages without a benchmark in Asia, whereas for the other regions there is the freedom to focus on either a comparison against the product category or to not include any comparisons at all. Nevertheless, for all regions the most important thing remains to stress the key benefit of the product, thereby promising value to the consumer. This will always be key and setting the brand apart is only of secondary importance.

Must meet certain standards

The findings of the meta-analysis revealed that every message must meet certain standards for style and tonality in order to succeed. While adhering to the message checklist below may not guarantee that a message is successful, it will ensure that the message does not fall short due to weak articulation. Style and tonality often are regionally specific, as language in one country does not necessarily translate into another. Perhaps it is not surprising then that researchers found differences between regions. Pitfalls in some regions represent potential opportunities to strengthen the message in others.

One of the first pitfalls to avoid when creating and implementing strong marketing messages in Western Europe and the U.S. is phrasing messages in a negative way. Although in some instances it is necessary to discuss overcoming a negative, consumers instinctively prefer those that offer to provide something positive: *For clean and spotless clothing* versus *Removes difficult stains, like grease and dirt*.

The first claim is often considered to be more motivating – as it offers to provide clean clothes – than the latter. Negative messaging, despite offering the ability to avoid or overcome the undesirable elements, can create negative connotations in the minds of the consumers.

Despite this, consumers in Asia and Latin America are often strongly motivated by messages that focus on avoiding something negative. Stating the ability to solve a problem or an issue that a consumer may currently experience can be very motivating in these regions, as it reassures consumers about what will not happen when they use the brand or product. Although the principle of staying positive often enhances message effectiveness, marketers in Asian and Latin American markets have more freedom to incorporate the prevention of negative elements. Of course, some product categories such as hair care and laundry are more suitable for prevention claims (prevention of hair fall, protection from damaged clothes, etc.) than other categories. But especially in categories such as these, in which prevention is a key benefit, focusing on this prevention can strengthen the appeal of the message in Asia and Latin America.

The benefits offered in a marketing message are often supported by reasons to believe, such as a new product formulation, a new technology or professional endorsements. These reasons to believe are provided to add credibility to the claim that the brand or product can deliver on its promise. There are different ways to incorporate these supporting elements, many of which are perceived in very different ways across regions.

References to technologies and formulations often run the risk of being perceived as jargon, which should be avoided in most countries, but the mention of technologies and formulations can substantially strengthen the effectiveness of a message in Asia. With this in mind, it is still important to use self-explanatory terms and avoid complex and abstract terms when mentioning technologies or formulations.

Asia: *With a triple action system that is scientifically proven to repair broken hair*

The message enables consumers to visualize what a triple-action system provides and therefore increases the effectiveness of the communication.

In Latin America, but also in Asia, endorsements from relevant experts and professional institutions are appreciated. Including a reference to a health institute, for example, can strengthen a message and the idea that the product can deliver on the promise. However, expert endorsements can only be effective if consumers perceive the expert or association to be relevant and credible as an expert judge of the topic. Utilizing endorsements from unknown entities, or those which may not be relevant to the topic, fail to strengthen a message and can sometimes breed distrust.

Latin America and Asia: *Gentle for the skin – approved by the Association of Dermatologists*

Finally, in Western Europe and the U.S., consumers prefer reasons to believe that refer to ingredients they know and possibly explain how those ingredients will help the product deliver on the key benefit.

Europe and the U.S.: *With proteins that strengthen your hair from root to tip*

This type of message can motivate consumers as it describes not only what the protein does but what it does for the consumer: create stronger hair. When mentioning ingredients it is important to ensure that consumers are aware of and knowledgeable about these ingredients and their function, otherwise they will be perceived as jargon and run the risk of losing the ability to enhance the value proposition.

With all of this in mind, there are several other pitfalls that need to be taken into account when crafting marketing messages globally:

- **Be respectful.** Know your audience; don't inadvertently be condescending or presumptuous.
- **Be clear.** Use simple and unambiguous language to ensure the message is understood.
- **Be coherent.** Connect the dots and ensure the proposed benefits and supporting reasons to believe are related to each other.
- **Be fluid.** Create sentences that flow naturally in the native language and do not sound contrived.
- **Avoid humor.** Be direct and focus on efficiently getting your value proposition across. Although humor can be effective in a marketing campaign, a message only has a split-second to grab and maintain interest. Therefore, it is recommended to focus on the value promise rather than making the consumer laugh.

Resonate all over the world

The results of the analysis by SKIM confirmed that there are indeed similarities that enable messages to resonate in different countries all over the world. However, the analysis also highlighted several important differences among global consumers that must be taken into account when developing communication messages. By leveraging the key global characteristics of strong messaging and making slight adjustments to match the preferences of local consumers, marketers can ensure that brand and product messages resonate with all consumers.

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health care/global research

Calling Dr. Diet, Dr. Quiet and Dr. Merryman

How to address cultural conceptions of illness, health and wellness

| By Jeremy Pincus

snapshot

The author explores factors in several countries that affect patients' and doctors' approaches to health and medicine and their implications for global health care marketing research.

Marketing researchers recognize that emerging markets will provide the engine of pharmaceutical revenue and profit growth in the coming decades. Because global markets vary dramatically in how consumers view illness, health and wellness (e.g., what illnesses mean, the remedies available, the best sources of advice, the best ways of treating), effective health marketing requires a deep understanding of local mind-sets. Fortunately, medical anthropology can inform global pharmaceutical marketing research studies by providing a deep understanding of local ethnophysiology (culturally-embedded beliefs about how the body works), cultural disease categories, beliefs about causes and vulnerability and beliefs about the interplay of Western medicines with traditional/herbal medicines.

Based on research conducted in a mix of established and emerging countries, we identified a set of

seven global truths and implications for global health care-focused marketing research:

1. Biological and medical concepts are converging

Global communication is standardizing disease categories and treatment concepts, particularly among urban, educated classes and physicians, many of whom are trained in the West. Pharmaceutical advertising and government-sponsored PSAs also drive standardization of concepts through widely available media and growing global Internet penetration. This convergence makes global pharmaceutical marketing research possible as it provides a baseline level of thinking about health.

2. Western medicine is being integrated into treatment regimens

Although traditional herbal approaches are generally preferred for minor ailments and prevention, Western medicine now plays a role in health care nearly everywhere, alongside traditional beliefs and practices. Western medications are commonly viewed as "strong," i.e., effective but prone to side effects; therefore, these medications tend to be viewed as most appropriate for "serious diseases." In many markets, physicians tend to view branded products as superior in avoiding side effects, yet side effects are often viewed by patients as a sign of efficacy, as suggested by the Swahili saying, "Bitter pills may have blessed effects."

From a research perspective, Western medicines are expected to be strong and effective (garnering high brand ratings on such attributes) but items assessing "too strong" and "interferes with the body's natural processes" may be just as important, as is the potential for mitigating side effects with traditional/natural remedies.

3. Skepticism reigns

Patients around the world share skepticism about doctors and medicine, as indicated by folk sayings such as "The best doctors are Dr. Diet, Dr. Quiet and Dr. Merryman" (China) and "A good laugh and a long sleep are the best cures in the doctor's book" (Ireland). Questioning should acknowledge that consumers generally try to avoid treating by use of more extreme phrasing to find differences among consumers, e.g., "I wait as long as physically possible before taking medicine."

4. Prevention is better than cure

In many cultures, folk wisdom extols the virtues of disease prevention, as conveyed by the proverb "A man too busy to take care of his health is like a mechanic too busy to take care of his tools" (Spain). Disease prevention is typically equated with healthier lifestyles (i.e., improved diet, exercise and smoking cessation), with the key demographic of urban, educated, upper-class females age 18-35 representing heavy adopters of natural products, herbal teas, vegan diets, alternative meds, yoga, Pilates and avoidance of artificial ingredients. This desire for healthy lifestyles can be taken to extremes, as in a new condition known as *vigorexia* (exercise mania) afflicting young urbanites in Spain. Conversely, emphasis on improved diet can be a reaction to the loss of indigenous cuisine and corresponding rising rates of obesity. For example, Italy, Southern France and Spain have always been known for the heart-healthy traditional Mediterranean diet of fresh fish, fruits and vegetables, pasta, olive oil and garlic, yet due to the proliferation of processed foods and fast-food outlets, Italy now has a childhood obesity rate of 25 percent.

When designing research, questioning needs to raise the bar on healthy lifestyle attitudes in order to find differences among consumers since there is near universal agreement that diet and exercise are good for you. More extreme statements can effectively differentiate consumers, e.g., "I follow a very strict diet" or "I am diligent about getting physical exercise regularly."

5. Illness is a family thing

In most cultures, illness is viewed as a disruption to the total family system. In addition to the financial impact associated with the loss of the patient's income and the loss of caregiver income, there is the emotional impact and physical stress of caregiving. In virtually all cultures, the family constitutes the major source of caregiving in response to the needs of the ill or elderly. When designing research for chronic conditions, it is often useful to include a sample of caregivers as an important source of influence on treatment, a window on patient status and to measure the indirect impact of the disease on others.

6. Mental illness can carry stigmas

In virtually all cultures, mental illness carries significant stigma, which is expressed in culture-specific ways. In individualistic cultures, the foremost threat is to one's identity, leading to feelings of shame, especially for men. Spain and Italy, the global hubs of machismo, share the lowest rate of seeking help for mental health problems, especially among men. In communalistic cultures, such as China and Japan, the primary threat is to one's (and one's family's) standing in the community. Because of the broader risk, mental illness is generally hidden as long as possible and doctors tend to label mental health conditions with remarkable vagueness: a very common diagnosis in China is neurasthenia (*shenjing shuaijo*), a diagnostic code that was abandoned by Western psychiatry 50 years ago. *Shenjing shuaijo* can include any of the following: anxiety, depression, bipolar disorder, sexual dysfunction, anemia, insomnia, attention deficit disorder, etc.; the ambiguity of this diagnosis serves an important protective function.

Similarly, in Central and South America, mental illnesses are often treated as spiritual crises that go by various names (e.g., *espanto* ("shock"), *susto* ("fright disease"), *mal de ojo* ("evil eye sickness"). Traditional healers called *curanderos* use religious rituals, ceremonial cleansing and prayers as treatments, which takes mental illness out of the realm of medicine and into the realm of religion, thereby preserving the self-esteem and social standing of the afflicted. In the West, too, there is a strong preference for treatment by general practitioners, psychologists or neurologists instead of psychiatrists, which tends to be stigmatized as appropriate for the most severe cases.

When conducting research on mental health conditions it is important to convey the procedures that ensure anonymity and confidentiality to reassure potential respondents. Additionally, in cultures that tend to categorize mental illness in different ways, symptom lists can be combined to identify conditions so that patients do not need to admit to the stigmatized condition directly.

7. Dermatological conditions can carry stigmas

In virtually all cultures, skin disorders carry significant stigma because dermatological problems are visible and may be interpreted as contagious or infectious. As a visible "defect," dermatological conditions affect marriageability in many cultures. In rural parts of Brazil, an outbreak of shingles is often treated by three days of prayer or "pranic healing." If more than one person has a visible dermatological condition simultaneously, it is considered a sign of bad luck for the whole community. Because of the fear of stigma, sufferers typically go to great lengths to hide affected skin. Similar to mental health research and STDs, care must be taken to reassure respondents of privacy and anonymity procedures when attempting to research dermatological conditions globally.

Sharply divergent

In contrast to the global truths, health practices can be sharply divergent between markets.

Cultural conception of disease. Different cultures can have vastly different ways of thinking about diseases. For example, some diseases are expected as a normal part of development (e.g., chicken pox) whereas others are unexpected (e.g., shingles). Some diseases are culturally stigmatized (e.g., STDs, lung cancer), whereas others are culturally supported (e.g., breast cancer, MS). Other cultural distinctions include minor vs. serious, acute vs. chronic, inherited vs. acquired, etc. Different cultures also can hold radically different notions about disease causation. In Western cultures, heredity, lifestyle (e.g., diet, stress) and the environment (e.g., germs, allergens) are prominent causes, yet in many parts of the world illness may be alternatively attributed to heat, cold, moisture, pollution and a host of supernatural causes including curses, possession, soul loss, etc.

The bundle of meanings attached to a disease is known as a semantic disease network; these networks matter because how disease is conceptualized determines how it's treated, as summarized in the Spanish proverb "The beginning of health is to know the disease." For example, in Western countries, diarrhea, skin rashes or a dry cough are recognized as distinct conditions with no clear correlation. However, in parts of Asia and Africa, the co-occurrence of these symptoms is recognized as "inside fever" – a fever that is undetectable to the touch or via thermometers and settles deep within the body. For those conducting a global research project on the GI tract, dermatological conditions, or upper respiratory conditions such as asthma or allergies, it may be important to address inside fever in questioning.

A variety of folk illnesses have been documented. *Susto* (fright sickness) and its more severe form *espanto* occurs in Central and South America, which are akin to PTSD or even schizophrenia in some cases, attributed to "soul loss" resulting from severe fright or trauma. Others include *empacho* (impacted stomach), *dhat* (semen loss anxiety) in India and Sri Lanka; *koro* (penis shrinkage delusion) in China and southeast Asia; *boufée délirante* (chronic hallucinatory psychosis) in France; *kreislaufstörungen* in Germany (i.e., dizzy, lightheaded, weak, anxious feeling attributed to poor blood circulation; akin to the Victorian British folk illness known as "the Vapors"); and bulimia nervosa and Type A behavior pattern in Western cultures. If research pertains to any of the symptoms associated with a folk illness, analysis should go beyond the individual symptoms and incorporate the cultural syndrome.

When designing research, it's important that disease descriptions fit local understandings. Fit can be improved by permitting multiple routes to qualification through various culturally-appropriate condition labels and through symptom lists; e.g., in China, seasonal allergies can alternately be called flower symptoms, wind pimples or allergic rhinitis. It can be important to capture culturally adjacent co-morbidities to align questioning with local understandings of conditions that naturally "go with" the condition of interest. For example, in traditional Chinese medicine, erectile dysfunction is associated with kidney problems. It also be important to include culture-specific condition triggers to capture align with local ideas regarding disease etiology. For example, in describing GI problems to southern Europeans, the notion of "eating too quickly" is relevant.

Access to physicians. Access to physicians is markedly different in various parts of the world, with structural factors determining the quality, quantity and duration of patient-physician interactions. For many countries with national health services, physician visits typically last a maximum of 10 minutes and may require four-hour wait times. Health care concepts need to adapt to fit radically different delivery systems, as illustrated with the following four examples:

- In China, patients tend to self-refer or are referred by nurses (not PCPs) to specialists at regional hospitals.
- In Italy, GPs play a strong gatekeeping function. In order to gain access to specialists or prescriptions, patients must build a case for referrals by exaggerating symptoms.
- In India, registered medical practitioners can be trained in either Western medicine or traditional Ayurveda, Yoga, Unani, Siddha, Homeopathy and/or Naturopathy (AYUSH). Any of these practitioners may practice as "qualified doctors" whether or not their knowledge is "supplemented by modern advances." Although AYUSH practitioners are prohibited from prescribing Rx treatments to patients, this practice is widespread.
- In Japan, because other forms of health care are not reimbursed, physicians have a monopoly on health care delivery including the ability to directly dispense medication to their own patients.

In each market, researchers need to have a firm understanding of what constitutes a doctor, with which type of health care professional patients have relationships, the presence of primary care physicians, gatekeeping functions, etc.

Access to pharmaceuticals. Similar to physician access, access to pharmaceuticals is highly variable and the structure of delivery systems determines pharmaceutical usage. Prescriptions are not required in many emerging markets, such as China, Mexico, Brazil and India. Western notions of pharmaceutical access must also adapt to fit different delivery systems when conducting research. This is illustrated with the following three examples:

- In India, patients are more likely to have a personal relationship with their local pharmacist than with a physician. Local pharmacists (chemists) make diagnoses and directly dispense medications.
- In Brazil, pharmacists are sometimes paid commissions by local manufacturers of generics to prescribe these over branded medications.
- In China, government cost-cutting has reduced physician reimbursements, motivating physicians to supplement their incomes by receiving commissions to prescribe certain drugs, with heavy reliance on drugs that are stocked within the physician's hospital pharmacy.

When conducting research in these markets it can be more important to discuss pharmacist relationships than to ask about doctor relationships and to be aware of the potential for conflicts of interest.

Beliefs about Western medicine. Western medicine's perceived strength is viewed in many cultures as disruptive of the body's natural balance. Consequently, it tends to be viewed as too strong for patients in states of weakness such as childhood, pregnancy and old age. The strength of Western medications is believed to cause habituation, such that larger doses of Western medication are needed over time to get the same effect. Alternately, Western medicines are viewed as artificial and "industrial" and their use changes the body such that traditional remedies no longer work; for example, in India there is a common notion that overuse of Western medicines makes the body "hot" – akin to overuse of fertilizers and pesticides in soil.

The physical characteristics of medications (form, color, taste, shape, pill size, etc.) can have surprisingly important connotations to patients in different markets. In India, white pills are considered mild and safe, whereas black pills are considered powerful and dangerous, which can affect patient compliance. Depending on the market, it can be very important to obtain consumer feedback on the physical characteristics of medications and the connotations of each.

Role of traditional treatments. In many regions, traditional herbal medicines tend to be preferred for health maintenance and disease prevention similar to the vitamin and supplements market in the U.S., as a first-line treatment, especially for milder ailments, to prepare the body for Western medicines or to restore the body after treatment, to boost the effectiveness of Western medicines and to mitigate side effects of Western medicines. In China, physicians receive training in traditional Chinese medicine in medical school and some doctors practice traditional Chinese medicine alongside Western medicine. Similarly, Mexican physicians prescribe traditional herbal medicines alongside prescription medicines as means to control negative side effects.

When conducting research in emerging markets it is important to resist the temptation to apply a Western lens in classifying patients as "pro-medication" or "anti-medication." In many countries, this dichotomy does not hold because nearly all patients accept both Western medications and traditional remedies; more useful distinctions can be drawn in ways that traditional remedies are used in conjunction with medications.

Lifestyle change. Despite government-sponsored attempts to promote a variety of healthy behaviors, culture-based traditions associated with alcohol consumption, driving under the influence, smoking, over-eating, lack of exercise, driving at high speed, failure to wear seat belts and/or drug use conspire to create barriers to behavior change. Culture-based resistance to lifestyle change is powerful in certain markets, as evidence by the Mexican saying "Graveyards are full of people that are too clean."

When conducting research, it can be important to measure not just attitudes that reflect aspirations to live a healthier lifestyle but to also include measures of social norms regarding lifestyle change. Measuring cultural barriers to lifestyle change should always include "permission statements," i.e., statements that suggest that such attitudes are widely held and perfectly understandable (e.g., "Like most people, I think you have to live for today and not worry about the future").

Skepticism of doctors. Doubting the skill and motives of physicians is a widespread and ancient tradition, as evidenced by the Chinese proverb "A young doctor makes a full graveyard." Unfortunately, there is sometimes more than a kernel of truth to these observations. In India's two-tiered system of private vs. public physicians/hospitals, the quality of care is markedly different. World Bank researchers studied public doctors' treatment of five common conditions and concluded that patients stand a 50-50 chance of receiving a harmful treatment. Corruption is also endemic: one-third of patients in government hospitals claimed that they had to pay bribes or use influence to get faster access to treatments or appointments with more experienced doctors and to get clean sheets and better food. Unsurprisingly, the Indian upper classes avoid public doctors and hospitals. These dramatic cases of poor quality associated with free or subsidized health care recall the African proverb "If you are too smart to pay the doctor, you had better be too smart to get ill." An implication for research design is that it may be important to measure perceptions of trust and quality associated with different tiers of health care professionals.

Cultivating confidence among patients is critical to the success of doctors, particularly in rural areas. In rural India, successful doctors are those who gain a reputation of having the "power of the (healing) hand." Similarly, in Mexico, the term *confianza* as applied to the relationship between patient and doctor goes beyond the literal translation of "confidence" to imply a deep and abiding trust and respect. Because reputation is critically important to the commercial viability of small practices, to mitigate this risk, doctors in some emerging markets actively seek to protect their reputations through a variety of means including "softening" diagnoses (providing patients with diagnostic labels that are inaccurate but more acceptable) and/or "softening" treatment (providing patients with treatment regimens that are less efficacious but more acceptable or affordable). Doctors in these markets fear that by immediately diagnosing the full extent of serious conditions or by prescribing uncomfortable or expensive treatments, patients will simply go elsewhere and will tell others of their experience, diminishing their reputation for healing ability. Some doctors may consider these practices to be less self-serving and more of an attempt to minimize patient fear and social disruption.

There are many examples of diagnostic softening: In south India, cholera and dysentery are often labeled as gastroenteritis. In the Philippines, tuberculosis is often labeled "weak lungs." Even "lung cancer" among Vietnamese may be a preferred label to avoid the stigma and social isolation associated with contagious tuberculosis. In addition to mislabeling of health conditions, asymptomatic stages of serious illnesses may be downplayed to patients.

Social and economic factors also play into diagnosis and treatment in many regions. Diagnosing the patient's ability to pay is an important part of medical practice in rural and emerging markets. Where patients are deemed to be unable to afford proper treatment, expensive medications may be delayed.

When conducting research in these markets, it can be important to use permission phrasing when asking doctors about diagnosis and prescribing to address issues around tendency to soften diagnosis and prescribe suboptimal but affordable treatments. For example, we might wish to ask physicians to what extent they agree that "Maintaining a patient's sense of hope is ultimately more important than making them accept a difficult diagnosis" or "Doctors need to consider patients' ability to pay for treatments when making recommendations."

Create clear challenges

There are many significant cross-cultural differences in the worldview of both patients and physicians that create clear challenges to cross-cultural marketing and research. These challenges may be summarized by posing a set of questions that marketing researchers might ask themselves as they design cross-cultural studies.

Disease. Are there local, in-country experts on the research team representing each major region, ethnicity and language? Is cognitive pre-testing of all research instruments conducted in all local languages and dialects? For any stigmatized conditions under study (e.g., mental health, dermatological conditions, etc.), is the data collection method discreet, with anonymity procedures explained to participants? Does the local semantic disease network guide disease language, including both formal and colloquial names for diseases of interest, as well as folk illness syndromes? Are symptom lists provided for non-self identified sufferers? Are culturally-adjacent co-morbidities included?

Health care provider. Is questioning appropriate to local HCP-patient relationships? Is the local pharmaceutical distribution system accurately reflected (e.g., directly dispensed by physician, dispensed by pharmacist without prescription, written to hospital pharmacy, retail pharmacy, etc.)? Is permission-language for physicians included for sensitive subjects (e.g., preserving a patient's position in their family and community is more important than the pace of recovery)?

Treatment. Are culturally-relevant treatment attributes included (e.g., Can be used even in states of weakness)? Is the prescription vs. non-prescription distinction locally relevant? Is the branded vs. generic distinction locally relevant? Are local side effect concepts included (e.g., heat, bloodlessness)? Are physical characteristics of treatment included? Are local treatments included?

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global research

When 8.5 is less than 6.2

Understanding the challenges of cross-cultural scaling

| By Pete Cape

snapshot

SSI's Pete Cape offers some guidance for approaching problems related to cultural differences in scale usage.

So you get your results back. The Japanese survey rates your client's hotel chain an 8.34 out of 10 on cleanliness. Your American survey reveals a 7.46. The difference is statistically significant. What do you tell your client? Are the Japanese employees better at keeping the hotel clean than the American ones? It seems so from the data but there is something nagging in the back of your mind: Do Japanese respondents always rate more highly?

If that were the case wouldn't it be great if there were some simple way of converting a Japanese rating into an American one? Well, it would be great but unfortunately it is neither simple nor easy. If it were, we would all be doing it!

This article outlines the challenges and suggests some direction to create practical solutions. Given the importance of scales in questionnaire design and the increase in multicountry research, we hope in this article to provide a clear understanding of the issues as a foundation for research which will result in more powerful and reliable solutions than we have today.

There are mathematical ways of dealing with the issue but they are not without their own problems. (We address some of them in the sidebar on normalization and standardization but you might want to read on first.) Why is it neither simple nor easy? Because it is a multifaceted problem, with even more facets than you might think.

If we look at the way the problem is presented there seems to be only one issue at stake: Do Japanese consistently rate the same thing more highly than Americans? And with two variables we have four possible outcomes:

1. Japanese and Americans rate the same way; the hotels are different.
2. Japanese and Americans rate the same way; the hotels are the same.
3. Japanese and Americans rate differently; the hotels are different.
4. Japanese and Americans rate differently; the hotels are the same.

quirks.com/articles/2014/20141108

Gaps not ratings. This problem of the expectation of service quality led to the development of alternative ways of measuring service quality. Best known among these perhaps is Zeithaml, Parasuraman and Berry's SERVQUAL model, which measures a whole series of gaps between expectations and delivery at all levels within an organization. For customer satisfaction the gap is between the expected level of service and the experienced level of service. The expected level is uncovered by asking the respondent to rate a fictitious company that would be deemed "excellent." Importance weighting is used to tease apart service dimensions that might otherwise look to be equally expected. Since within any single culture we might expect the scales to be used in the same way, the size of any gap between expected and delivered ought to be the same. This approach however ignores the issue of differences in perceived scale point distances. It can therefore make the situation in one culture look worse than in another when in fact they have the same "gap" in reality.

The data would seem to suggest that Option 2 cannot be true. But recall that when we perform a test of statistical significance, while we might find a 95 percent chance that the numbers are different (i.e., Option 1), this naturally means there is a 5 percent chance that they are not (i.e., Option 2).

Should either Option 3 or Option 4 be true, that may lead to different courses of action by the business. And therein lies our dilemma and our big unknown.

But is it our only unknown? There are other dimensions to consider.

Cultural meaning in scales. It is common in market research to use numeric scales to represent degrees of difference. It seems intuitively obvious that this type of scale does what we want a scale to do. The spaces between the points are equal (just as we would like a verbal scale to be) and the progression of the numbers from low to high suggests an improving picture from bad to good. To aid the respondent we often anchor a scale with words to convey what it means. Or rather, what it is supposed to mean, for numeric scales used in this way are not equivalent to centimeters or inches on a ruler. The meaning of numeric ratings is steeped in our cultures. For most of us it begins at school. In the U.S. the grade average is between 0 and 4, although of course children receive their actual grades in terms of A to F. This is by no means a universal. In France the scoring is 0-20, in Italy 1-10, in Russia 1-5. Now, put some pressure on someone to make decisions repeatedly and quickly and they will eventually revert to heuristics. This is the reality of data collection today. We ask people to respond to multiple items in a grid very quickly. So a 7 in Italy is good; in France it is not so good. Take this to another extreme and consider that in Germany scholars are rated from 6 to 1, with 1 being the highest! Education scoring also sheds light on the meaning of the space between the numbers. They are not equal. Take this example from France:

16-20: very good (*très bien*)
14-15.9: good (*bien*)
12-13.9: satisfactory (*assez bien*)
10-11.9: tolerable (*passable*)
0-9.9: fail (*insuffisant*)

Both the top and the bottom brackets are wider than the middle 3 and the "good" grades start at 70 percent of the scale (14 out of 20). In the U.S. one might expect good grades to be starting more around 80 percent.

Problems are fewer with verbal scales but there are, of course, issues in translation. Perhaps *assez bien* in French is better (or worse) than the translation "satisfactory" is in English? Note also that the French scale stops at "very good" where a market research scale may go to "extremely good" – Google Translate makes no distinction between these two phrases in translation into French – both are rendered as *très bien*.

Cultural meaning in items. We must also concern ourselves with the relative meaning of the items that are being rated, their meaning within the culture. While it is outside the scope of this article, it is worth thinking about the relative importance and resonance of "cleanliness" (in our example) in the two cultures. It is not only in the behavioral sciences that the risk of generalizing from WEIRD (Western, educated, industrialized, rich, democratic) samples to human populations exists.[1] Researchers (and marketers) also tend to be WEIRD and will happily write questionnaires from their own perspective. Importance and saliency are probably the two most valuable questions that are most often left out of surveys. If we have this data we can use it to up- or down-weight how much attention we pay to item differences we observe.

More problems

So, to our first two problems – Do they always rate more highly? Is the data the truth? – we can also add: Do the scales mean the same thing? And: Is the item being measured in any way meaningful? Just taking the scale meaning alone increases our set of possible outcomes from four to eight.

And there is one more issue that is often ignored: the question of expectations. These are also culturally-driven. If my expectation of cleanliness is low then a "somewhat good" level of cleanliness (from Culture A's perspective) is going to look "extremely good" from mine. So the precise same level of absolute cleanliness would be rated differently from the two cultures' perspectives. This issue is solved in part by considering service "gaps" rather than absolutes; that is, the gap between expectation and delivery. Couple this with a relative importance measure and you have a powerful tool to allocate resources and measure progress (see the sidebar "Gaps not ratings").

Adding in the issue for expectation or service delivery takes our set of pos-

Normalization and standardization. In this solution to the problem we examine the data relative to itself and all other items in the battery being tested – in order to see how the scale is actually being used. Once we understand the distribution, the data can be manipulated to, in effect, put it on the same scale. Normalizing to unity (i.e., getting a score between 0 and 1) can be a relatively simple data transformation: For each data point calculate the distance between it and the minimum of all the data points and divide this by the maximum range of the entire data set. Doing this separately for each culture's data set should, in theory, solve the problem. Doing this, however, presupposes that there is scale usage effect on the data and that your observations are not actually true. Like our concentration on statistical testing, in many ways these approaches have appeal because they have a paradigm and mathematics on their side.

sible real outcomes from eight to 16!

It is no wonder that the hard-pressed researcher falls back on considering only one problem – that of sample error. At least he has theory, formulae and a calculable probability of being correct; and is safe in the knowledge that the real truth, in opinion research, can never really be known.

Identify variables

Once we understand the dimensions of the issue it is obvious how the cultural effect of scale usage should be measured and that it cannot simply be done through observation of survey data. Firstly we need to identify some variables or dimensions that are culturally neutral. They should be something that we all, the world over, agree on as an essential human truth that we should all rate in the same way. Then we need to find some measuring stick (our scale) that we can agree has the same meaning at each of its points. Any observed difference between cultures on their ratings must then be due to cultural bias in response (plus sample error; and we have a paradigm for dealing with sample error). Applying the calibration factor to any given rating will adjust the scores, making them equivalent.

While easily stated, it is not a simple matter to find either the scale or the culturally-neutral items. One thing is for sure: With the plethora of scales in use today and the modern trend for questionnaire design without any pre-survey qualitative work, the chances that you hit on a culturally-neutral item and your scale is cross-culturally valid must be small. We need to look outside our own market research frame of reference to find these cross-cultural items that ought to be responded to equally. The worlds of social values and moral psychology may be fertile ground for us.

Be less sure

If researchers work with cross-culturally-validated scales and can take the time to ensure all their items are equally salient then the probabilities work in their favor that what they observe (given a confidence interval) is actually the truth. But they should be less sure than they think they are: Their possibility of being wrong is higher than their statistical test suggests.

If we knew for sure how to calibrate our scales for any cultural bias in usage then we would be in a better position to advise companies where to concentrate their scarce resources. And that would be good for market research the world over.

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research communities

We're in this together

The 10 golden rules of engagement

| By Clarke De Pastino

snapshot

Whether via social media or as part of an online marketing research community, the ways brands and companies engage with their consumers should be guided by these golden rules.

We are living in an age of technological revolution caused by the rapid and widespread adoption of online technologies and the active participation of virtually all members of the public in social media. Companies today understand that the effective integration of technology and social media in their research and marketing is critical to their ability to compete in the marketplace. Indeed, customers expect to be engaged by brands through a variety of media and devices. Companies therefore need to know how to harness the power of those mediums to best engage with their customers, whether they are interacting with their customers on social media or as part of an online marketing research community.

Engagement is such a hot topic that Mashable listed it among the "30 overused buzzwords in digital marketing." *Ad Age* and Google recently issued a joint report on brand engagement, stating that 90.8 percent of Generation C consumers regularly engage with brands online. In a recent Forrester Research report, David M. Cooperstein wrote "The only sustainable competitive advantage is knowledge of and engagement with customers." What is missing in the dialogue is a clear and simple idea of what engagement means in this new world order.

If you Google "engagement" you'll find definitions from several sources that touch on the truth at the heart of engagement but none of those definitions are particularly helpful when crafting an engagement strategy. Understanding engagement merely means understanding the hallmarks of basic human interaction and collective behavior – in this case, of like-minded members of online communities. If you want to engage customers, you need to use the universal skills required for positive and effective social interaction.

Throughout recorded history, cultures around the world have instructed children to obey the Golden Rule. The Golden Rule is a universal ethic and a default moral position for all cultures because it requires people to actively think about others, to try to imagine how they think and feel and to use that information in all aspects of social interaction. In other words, the Golden Rule requires us to empathize with others, including those who may be very different from us, to understand, respect and ultimately meet their expectations.

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The best practices for engagement are derived from the basic sociological truism embodied in the Golden Rule. Adherence to that fundamental code allows us to creatively engage with people, even though their wants and needs may not be identical to our own.

We therefore call the best practices for engagement the “10 golden rules of engagement.” Our team has developed these rules after more than 15 years of experience working with clients and their community members. These rules are the foundation for engaging with people online. To some, these rules are obvious; to others, they may be counterintuitive. And, standing alone, they are arguably not unique or innovative. But when consistently applied together, they become a platform for innovation and creativity from which the opportunities to launch tactics to drive participation in research or marketing and enhance brand affinity are limitless.

Golden Rule #1: Demonstrate and deliver value

Successfully motivating customer engagement requires you to appeal to the customer’s self-interest. Accordingly, in the very first moment of interaction with them, you must make a promise that you have something of value to offer them and deliver on that promise.

Creating that promise starts with an exercise in empathy, asking oneself: “If I were a research community member what could this message offer me that would make me want to open it, read this copy, click this link and participate?” It’s easy to define the value of members participating for the brand but your members need to be intrinsically motivated. To make a successful value proposition, you must understand why your customers would want to interact with your brand and appeal to what’s in it for them. You don’t need to promise a tangible or financial incentive or engage in obvious salesmanship. Indeed, as discussed below, intangibles can be strong motivators. The promise can be as subtle as funny content, exclusive information or a prize. Once you’ve defined the value proposition, you must deliver, because all people, particularly in the customer service context, expect it of you and will not necessarily forgive a failure. You will lose members quickly, and once you’ve lost them, it’s very difficult, if not impossible, to get them back.

Golden Rule #2: Build relationships

We are living in the Participation Age, in which more than 2 billion consumers interact in online venues daily. You are competing for their attention. To be one of the ones that reaches them, the Golden Rule teaches us that you must let them know that you value them enough to invest the time and energy to build a relationship. The goal is not merely to get their attention. The hallmark of a strong relationship is connection and investment in the bond. By developing a relationship with community members, you are instilling in them a vested interest in the brand. Hill Holliday and Lippincott in their recent paper “Welcome to the Human Era” surmised that “customer insight yields more intimate relationships, which in turn accelerates additional insight. Across industries, we see this leading to higher profitability, deeper share-of-wallet relationships and stronger market values." Given that fact, it's not surprising that savvy executives like Amazon CEO Jeff Bezos "see [. . .] customers as invited guests to a party, and we are the hosts." Marc Pritchard, the chief marketing officer for Procter & Gamble, shares a similarly ambitious vision "to build 1:1 relationships in real-time with every person in the world!"

Gone are the days of brands pushing out messages and conducting focus groups behind two-way mirrors. Technology and social media have created an expectation in today's customers that brands will engage in a personalized and nearly instantaneously responsive one-on-one, two-way dialogue to share ideas and experiences. The face of the brand – the research community manager – must therefore foster real relationships with customers by personalizing interactions with community members. Developing meaningful and strong relationships, as always, is a two-way street. Community managers must therefore be willing to connect with the members by 1) sharing real information about themselves, such as first names, photos and short videos; and (2) respectfully asking questions of community members that the community manager would be willing to answer, listening to the member's answers and replying, because that's what's expected in any relationship. The discourse should be natural and relaxed like that between friends. You wouldn't give a friend the hard sell – using multiple adjectives and exclamation points. Learn to communicate genuine excitement to community members without overdoing it because unbridled enthusiasm doesn't ring true. Ultimately, if you successfully build relationships with community members, the members will continue to engage because they enjoy the interaction and feel invested in the brand.

Golden Rule #3: Be transparent

Respect, which all people expect and deserve, requires transparency. Anything less in this Participation Age unduly risks a negative and potentially lasting backlash. Once you have established a relationship with your members, you must be honest about what you are asking them to do and why and how that action meets the value proposition in Golden Rule #1. A classic qualitative research question might ask you to "share a story of someone that influenced you when buying a new car." That approach is not effective in engaging community members. Instead, the request should be framed this way: "Our marketing department is working on a new commercial about the people that influence your purchasing decisions. Please share a story about someone that influenced you when you were buying a new car." Adding details in the interest of transparency changes the tone of the conversation to one that is more conducive to building a respectful relationship. As noted in Golden Rule #2, building a relationship based on mutual respect and trust is critical to extracting the valuable insights that drive profitability.

Golden Rule #4: Involve the brand

It's not enough to have a branded Facebook or Twitter page. Once you go branded, you have to go all in. Customers today assume that every brand does this already. They are judging your brand on how well you do it. To stand out and effectively use the brand, there must be top-down buy-in from company executives. Customers truly appreciate access to executives, who are usually absent from direct customer interactions. Challenge executives to get involved by hosting live chats and blogging and tweeting with consumers. Remember a conversation is a two-way proposition. It's not enough to just tweet; executives need to engage by asking questions, listening and replying, which will generate customer insight. As with opportunities created by mobile, technological advancement has allowed for purely text-based responses from members to evolve into the sharing images and videos, which creates new platforms for creativity and new opportunities to bring the community experience to life.

Golden Rule #5: Show impact

Reporting back to research community members the value of their participation is a universal best practice of community management because it is an expression of gratitude and a demonstration that you have been listening and not wasting your members' time. All people like to know that they are valued and are contributing. Reporting back to members means letting them know what insights you've learned or gained from their contributions. Certainly, you have filled out a survey or answered a questionnaire and wondered what became of the data you provided. In communities, we have


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the opportunity to generate member goodwill by letting them know. You need not produce a formal research summary or matrix for their review. A thank-you note format is enough. And if the statement comes from a brand executive, you are simultaneously applying Golden Rules 1, 2, 3 and 4.

Golden Rule #6: Recognize and reward

Intangible recognition and reward are critical to fostering intrinsic motivation among your audience. By recognizing individual contributions, you are again creating a more vested experience in your community. In essence, you are exploiting our human need for time in the spotlight. Make your members famous in your community by featuring quotations from their communications and their contributions. Always give them credit. Rewards are also a powerful tool to engage a larger group of members. Consider creating a mixture of contests and sweepstakes to continuously drive participation across different initiatives and objectives. After you hand out rewards, remember to recognize the people who won! In addition, be sure to harness available technology by utilizing gaming mechanics to encourage participation through badges, points and access.

Golden Rule #7: Be entertaining

While probably the most obvious of rules, this is also where many brands fall short. People want to be entertained with interesting content. To create engaging content, a community manager wears a lot of hats, among those being copywriter, photographer, videographer and curator. The first step is to determine what your brand voice is online, which might differ from your brand's personality offline. Once determined, use media to make your posts stand out. According to a recent report by SocialBakers that tracked 5,000 brand pages on Facebook, photos made up 93 percent of the most engaging content. To create engaging content, you must also embrace and foster co-creation. Our own research at Ipsos shows that 44 percent of social media users under age 35 post questions, ideas and photos on brand pages.

Golden Rule #8: Communicate regularly

People can have short attention spans, need direction and like the security of a consistent plan. A strong, consistent call to action is therefore essential to drive interest and participation. Community managers should determine a cadence so that members can anticipate when to expect something new. Communication with members should be short and clearly define expectations when there is a desired action. While this has long been a best practice of e-mail marketing, a recent study by Buffer concluded that online posts below 250 characters can get you 60 percent more engagement and posts under 80 characters garnered 66 percent more engagement.

Shorter is also better because more and more members are engaging through their mobile devices – a venue in which less is more. Catering to mobile also gives you more opportunities to communicate regularly with your members, even when they are on the go, improving response rates. The vice president of global insight for General Mills recently recognized the power of mobile to allow for regular and meaningful communication, stating in an interview with *Forbes* that General Mills has "placed a significant bet on mobile research" and is "now conduct[ing] well over half of [its] research on mobile devices" because "mobile research allows us to ask questions where and when we want to" and "provides the consumer with options in terms of how they communicate back to us. If they can't put it into words, they can take a picture or a video and send it instead."

Golden Rule #9: Refresh your member base

Do not let the number of your members lull you into a false sense of security and confidence. The existence of a thousand followers doesn't mean that they are actively engaged. Members who are not actively engaged have little to no value. You should always be recruiting new members by promoting your community and social channels in venues where you are likely to attract new followers through online and offline promotions, e-mail newsletters and other customer-facing initiatives. If your objective is having members perform a desired action, then you should be comfortable with your member base being in a constant cycle of natural attrition and proactive replenishment. Not to mention, you can increase involvement by creating the impression that the community itself or at least specific content is exclusively available to active participants (see Golden Rule #6).

Golden Rule #10: Moderate closely

In Rule 5 we discussed the importance of listening and providing feedback. There is nothing worse than a negative post that goes unanswered, or a missed opportunity to probe and learn more. Community managers need to read every post and take the time to respond frequently. Responses should always be courteous and empathetic regardless of if it is an apology, redirecting to the appropriate channels, probing for deeper insights or simply thanking them for their time. In addition, moderators should ensure that members are protected from each other's abuse.

Guided by empathy

Those are the 10 Golden Rules of engagement. Use them creatively, apply them consistently. While the ever-changing technological landscape requires companies to use creativity and innovation in their interactions with consumers, the rules demand that we always be guided by empathy. In other words, engage your research community members and customers the way you would want to be engaged.

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●●● the business of research

Insights in their sights

Does customer experience = market research insights + implementation?

| By Eric Whipkey

snapshot

After attending conferences in both the marketing research and customer experience realms this summer, Eric Whipkey wonders if researchers are in danger of having their roles usurped or co-opted by CX professionals.

Recently, while updating my LinkedIn profile, I read over an article that I had written for MRA's *Alert!* magazine back in 2010. I basically wrote about the age-old concern of most market researchers that their reports were ending up as doorstops or bookends instead of as valued sources of insight. It struck me how this has changed very little, within the market research industry or consulting in general. I have heard the idea of going "beyond insights" discussed at many industry conferences recently yet most of us remain insight deliverers or recommenders.

But at another conference I attended this summer – Forrester's Forum For Customer Experience Professionals East – I discovered (for me, at least) an entire group of like-minded people that has actually figured out how to drive implementation from their insights. These customer experience (CX) professionals go by titles like: customer experience officer; customer experience designer; vice president, customer experience; manager, customer experience; and member experience officer.

There were a select few large companies like Mercedes-Benz, USA Bank and TDBank, among others, who presented what they had done in both research and implementation. Consistent with these presentations, when Forrester talks about this role it sounds as though these CX professionals have co-opted marketing, marketing research, human resources and even parts of IT.

That is what it sounds like, at least. In reality these professionals are adept change agents and relationship managers with particular talents in marketing, market research and/or Web design. When it comes to human resources there is a big focus on conducting "linkage research" (tying customer satisfaction/brand equity, etc. to employee engagement), which is nothing new really. I was actually involved in some of the earlier research of this kind 20 years ago while working with Booz|Allen|Hamilton.

As is the consistent finding when doing this kind of research, happy employees make for

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Figure 1

Figure 2

happy customers and by extension increased revenues. These CX professionals are beginning to develop programs targeted on what drives both employee engagement and successful customer experience. To do this, they are marshaling all of these departments (HR, marketing, IT, etc.) to change things for the customer's better.

Again, CX researchers are taking this research full-circle. They actually strive to create complete closed loops from the consumer insight through to improvements in employee engagement, easier-to-use Web site navigation, easier retail shopping experiences, etc.

In other words, they do not stop with insights.

Visually, this looks something like Figure 1. When I first saw this type of chart displayed by a major player in the retail space, it was kind of a revelation. This is what every market researcher hopes their clients will do with their research. But these CX researchers and functional heads have it as their charge to do just this – at least those who actually have real authority. (Unfortunately, not all of them do – some are department heads or authorities in name only. But that is a discussion for another day.) Where this is being done right, the CX officer, manager, etc., really is expected to make the circle shown in Figure 1 complete. In market research, we usually only get to see about half of this circle (Figure 2) and then we wonder, hope and guess.

I also discovered that there is an entire, seemingly duplicative, supplier market for these CX professionals, many of which are doing full-service market research but focusing on this rather lucrative space filled with established CX departments (mostly large Fortune 500 companies, i.e., Forrester clients). Others, however, like Medallia, Allegiance, ClickFox, Clicktale, Thunderhead, Maxymiser and OpinionLab, are offering full, closed-loop systems that incorporate market research with consumer feedback and client/stakeholder alerts. Most, if not all, of these tools require extensive enterprise-level cooperation, similar to what is required to install new CRM technology. But for those companies that are able to manage these enterprise-level relationships and data integrations, the solutions can really support closed-loop solutions through to implementation as the virtuous CX circle above depicts.

I cannot think of two other industries that seem to be engaged in the same work but getting to such different/more defined objectives. The other thing that I found interesting was comparing the vendors present at recent research-industry conferences with those found exhibiting at the Forrester conference. There is certainly some crossover in these two market spaces but the conversation and offerings being sold are far different, even when you have the same companies exhibiting. At a research conference you would mainly hear references to finding shopper insights, insights in general and/or innovation. But at the Forrester event, everyone, including companies that I had just heard talking about insights, was touting the customer journey, closed-loop programs, Web usability or UX design (in the CX space UX design is a big part of the business). By way of example, Table 1 shows some of the offers touted at MR conferences compared to those likely to be seen at a conference like Forrester's.

Two market research markets

There are truly two market research markets at the moment. Forrester talks about the CXO (chief experience officer) soon to be eating the CMO's lunch but market research should be paying attention too. At the least, we may soon be reporting to a CXO. But would that really be so bad? The track record in many

Table 1

Market Research Conference	Customer Experience (i.e., Forrester) Conference
Shopper Insights	Customer Journeys/Mystery Shopping
Storytelling	Journey Maps/High Production-Value Journey Videos
Text Analytics/Voice Analytics	Enterprise Text Analysis and Feedback (Call Center, Chat, Voice Recognition)
Mobile Research/Ethnography	Mobile Research/Ethnography
Web/Mobile Communities	Ethnography/Co-Creation
Neuromarketing	
Customer Satisfaction	Customer Loyalty
Branding/Positioning	Brand Experience/Experience Design
Online Survey Tools	Online Survey Tools
Research Panels	Enterprise Research Engines with Built-in Panels

Table 2

Thrilling	Outside the Comfort Zone
The entire company becomes your client.	You likely report to or present to the CEO.
Every consumer touchpoint is a focus of your research.	Any and all departments may actually change what they do based on what you say or report.
Your role could expand to include research about employees, the Web site and other channels.	All of your research could impact the brand and how it is perceived.
You may have to begin working cross-functionally to bring your recommendations to life.	You will have to actually learn what those other departments do (i.e., understand their business).
PowerPoint may not be your go-to presentation tool anymore.	You will be presenting to various levels and functional areas within the organization and may need to use video, infographics and more engaging tools to explain your research to all of these disparate people so that they will understand and become motivated to act based on your strategies.
Yes, I said strategies. You will be doing more than identifying tactical insights. CX is about your company's strategies for relating to and serving your customers.	Yes, I said strategies. You will be asked to have a strategy and not just a research plan.

companies of marketing having significant transformative roles is not so good.

Let's think a bit about how our market research lives might change if we reported up to or became one of these CX researchers or leaders. If this imaginary company truly gave the CX role the authority to enact the changes that the research supported it might be thrilling – at first. But it could also be off-putting for some of us. It may be a little outside our comfort zone. Table 2 shows some of the pros and cons in terms of thrills and comfort.

If you look at the list in Table 2 and find yourself getting more excited than uncomfortable, then you may be ready to look into customer experience. If you find yourself feeling more uncomfortable than excited though, you might want to rethink your market research career choice. If you really think about it, all of these uncomfortable things have been complaints of market researchers for a long time. I cannot count the number of presenters I have heard who essentially whined about being pigeonholed to one client/subject area; having a limited focus; no one listening/acting on the research; the research being tactical rather than strategic; boring PowerPoints.

So, let's take a good long look at this CX thing. Even if your company is not ready to change its corporate structure to add a CX officer, you may be able to begin a movement. If you want to check this out, I would recommend checking out what Forrester is up to or even the Customer Experience Professionals Association. I do not work for either of these organizations nor am I currently personally affiliated but I am thinking about it.

All I know is that these CX people seem to have figured something out and some rather high-profile companies are drinking the CX Kool-Aid. If you go for a sip, let me know what you think.

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text analytics research

Scores aren't enough

Why open-ends hold the key to customer satisfaction and loyalty

| By Ian Cain, Eli Orkin and Jared Schrieber

snapshot

In this retailer and brand perception case study, the analysis of previously unexplored open-ended survey responses revealed drivers of customer satisfaction and loyalty ratings.

Market researchers seem to love scores. Whether they are in the form of ratings, satisfaction or sentiment scores, market researchers draw most of their conclusions about customer loyalty and satisfaction from these scores. But what are those numbers really saying? They never truly get to the heart of what a consumer is saying about a store or a particular product. These numbers are simply approximations of perception that don't provide a company with the information necessary to react or to make improvements that would benefit an organization's bottom line.

Quantitative ratings expose only shallow sentiment. They fail to surface underlying drivers of emotion, expression and behavior. It is in identifying these drivers within qualitative data or open-ended feedback – and pairing that data with quantitative ratings – that enables businesses to react and to make immediate improvements that get to the root cause of customer issues.

A score does not allow a retailer to understand common themes amongst respondents at varying rating levels or provide a brand with insight into the fact that it's their recognition, or lack thereof, which is most affecting its rating. What it takes is a healthy mix of quant data and qualitative feedback to get to the crux of any customer-perceived successes or missteps. Furthermore, this methodology allows any researcher to validate or invalidate a quantitative score.

In the industry today, too many market researchers are spending their time quantifying and qualifying products and ideas instead of using methods that help solve issues and gain deeper knowledge of the consumer.

In-the-moment surveys

InfoScout's mobile apps incentivize over 100,000 American consumers to take pictures of their everyday shopping receipts on a longitudinal basis. To support this study, in-

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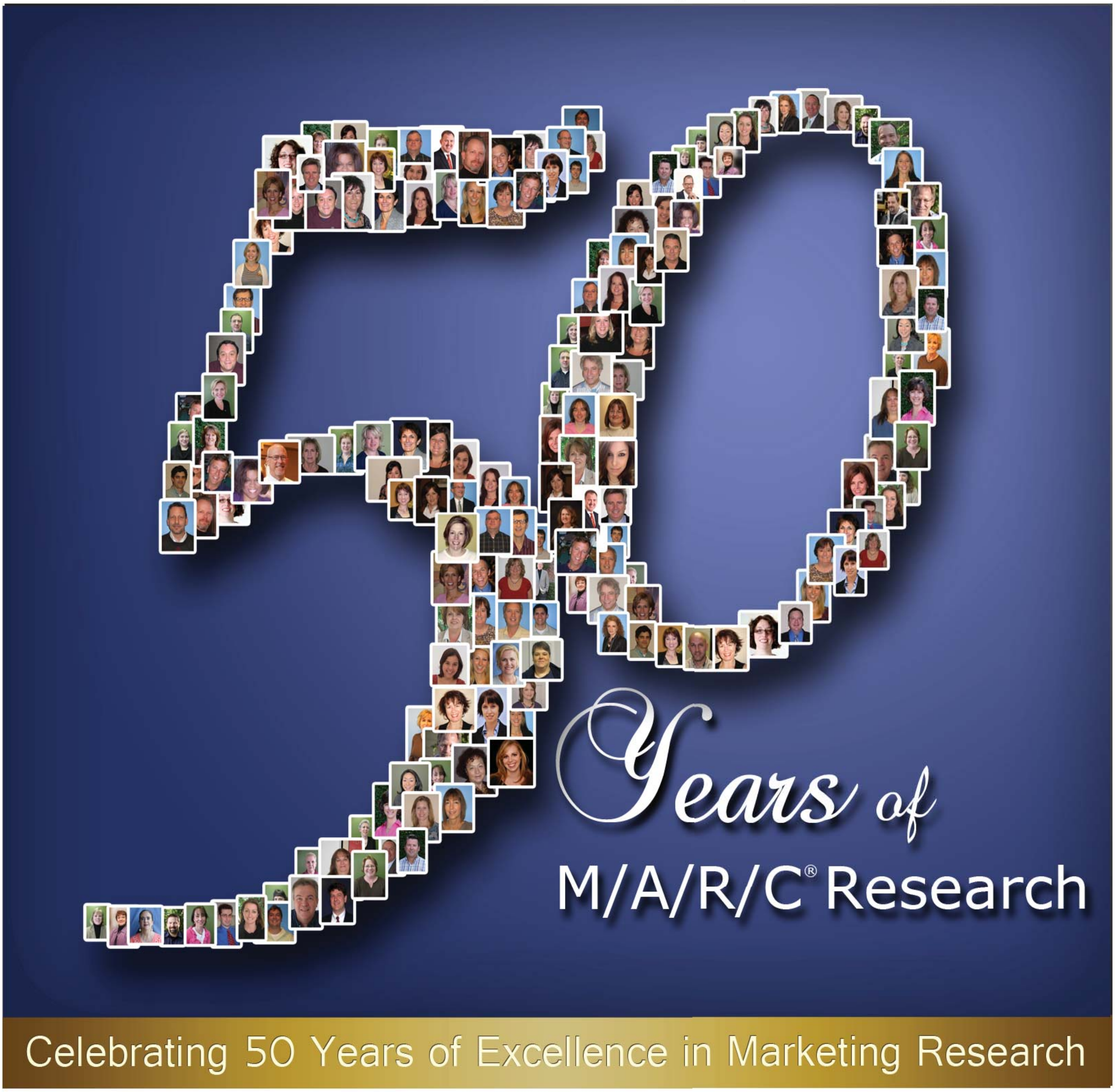
Tradition Leadership Loyalty Experience



50th Anniversary Celebration

marc

the-moment surveys were triggered to these panelists based upon where they shopped and the products they bought, with the goal of better understanding their decision-making along the path-to-purchase. A retailer trip survey asked shoppers to score their shopping trip and offer open-ended responses to why they chose that store along with their experience. A brand purchase survey asked consumers to rate and review the product while also exploring the extent to which its purchase was planned and/or other brands were considered.

Using Luminoso's market research software to analyze the hundreds of thousands of unstructured consumer responses revealed the driving themes and concepts behind quantitative ratings. The analysis provided insight into consumer behavior around purchasing habits and brand loyalty and uncovered consumer perception around retail stores, brands and specific brand categories. These are all things that would be unknown by relying only on a score.

Specifically, we looked at over 14,000 unstructured consumer responses regarding experiences at over 50 different retail stores and over 270,000 consumer responses to over 50 brands in order to understand what drove consumer sentiment and store selection across ratings of satisfaction and loyalty.

Figure 1

Figure 2

Most prominent themes

In the retailer trip surveys, when responding to questions about store selection, the most prominent themes were "location," "convenience," "price," "selection," "coupons," and "customer service," respectively.

Our analysis of open-ended responses also provided insight into how these major drivers of consumer sentiment fluctuated on the 1-to-5 scale. "Convenience" and "location" were the most important drivers of consumer responses at every level. However, those that rated their shopping experiences very low or very high tended to emphasize "convenience" and "location," coupled with "price" and "selection." At a neutral rating of 3, consumers emphasized "convenience" and "location" over other topics such as "selection" and "price."

Consumers who were less likely to recommend a specific retailer stressed "convenience" and "location" in their responses, while those who were more likely to recommend a specific store discussed "price," "selection," "location" and "convenience."

Consumer conversation changed dramatically around different stores and retailers (Figure 1). Responses regarding dollar and convenience stores were primarily driven by "convenience," "location" and "prices," while responses to discount and club stores like Costco and Sam's Club had virtually no association at all. According to our analysis, Whole Foods, Wegmans and Trader Joe's all ranked within the top five retailers for discussion about "selection," while drug stores like Walgreens, Rite Aid and CVS ranked in the bottom five.

Respondents overwhelmingly discussed "customer service" in feedback associated with Publix but there was hardly any discussion of "customer service" with large discount club stores (Figure 2). Availability of specific brand names and commentary around "loyalty" were most prominent in responses associated with Trader Joe's, Whole Foods and BJ's, all chains that are known for

Figure 3

Retailer Analysis: Competitive Analysis

Walmart	VS	TARGET
✓	Location	
✓	Convenience	
	Prices	✓
	Selection	✓
	Coupons	✓
	Service	✓
	Brands	✓

their private-label products as opposed to their selection of national brands. There was not very much association between those same themes and dollar and convenience stores.

When Walmart's qualitative data was compared to Target's (Figure 3), the difference between response themes was noticeable. Customers of Walmart stressed "convenience" and "location" when describing why they chose to shop at Walmart, while for Target they discussed "prices," "selection," "customer service," "coupons" and "brand selection."

In the brand purchase surveys, the most prominent themes among consumer responses were "positive taste," "positive price," "health," "quality," "brand recognition" and "negative taste," respectively.

On a scale of 1 to 5, respondents who gave lower ratings on their product purchases discussed a lack of "brand recognition" and "negative taste." Many consumers cited their reason for providing a low rating as not being familiar with the brand they had purchased. As ratings increased, themes such as "price," "quality," "taste" and "health" increased in prominence within consumer responses. When purchases were rated highly, consumers most often discussed the "quality" of their purchases, often emphasizing reliability, trust and familiarity with the brand.

Consumers were more likely to mention "price" and "quality" when describing shampoo products, diapers, and razors and less likely when describing candy and soda products. Chobani and Nature Valley (Figure 4) were the only brands that ranked within the top five for mentions of both taste and health benefits

Figure 4

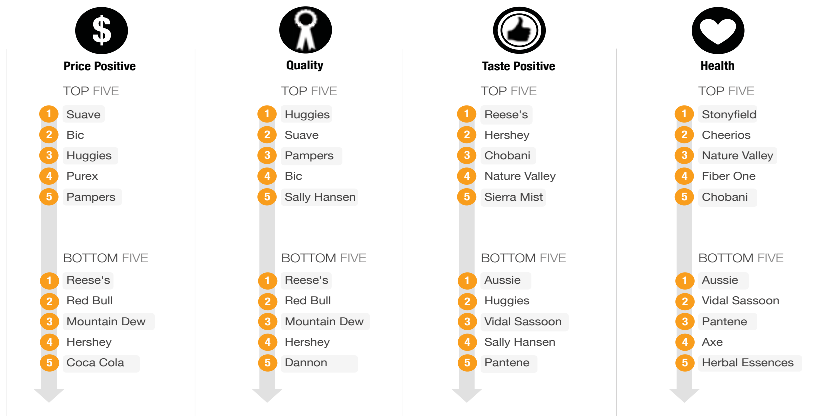
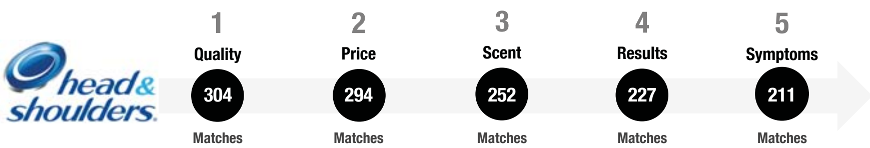


Figure 5



within open-ended responses.

The Head & Shoulders brand was isolated in order to discern the driving themes contained within the brand purchase survey responses (Figure 5). These driving themes were "quality," "price," "scent," "results" and "symptoms," respectively.

One of the more interesting findings was that consumers who rated the Head & Shoulders product within the middle of the scale discussed the "scent" of the product; as ratings increased, responses became increasingly driven by "symptoms," "quality" and "results." (Figure 6)

Open-ended feedback was also segmented and analyzed based on responses to a multiple-choice question about what the consumer would have done if their purchase had been out of stock. What were found were drivers of brand loyalty and detachment. Consumers who indicated they were loyal to the Head & Shoulders brand (Figure 7) tended to mention "results," "quality" and "symptoms." Consumers who indicated they were not loyal to the

Figure 6

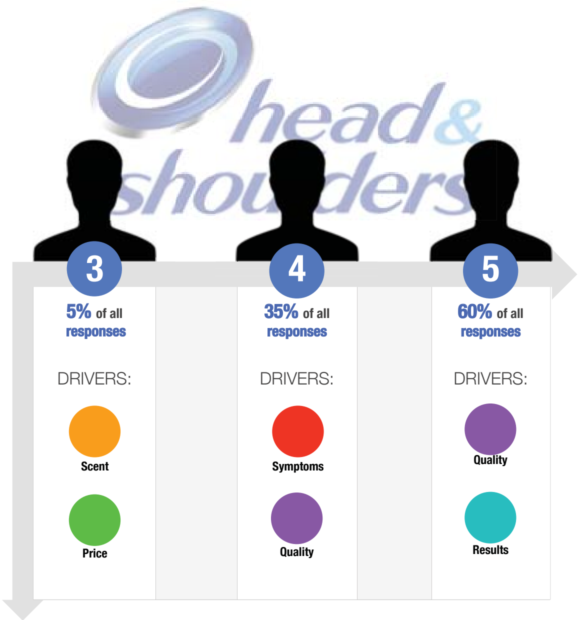


Figure 7

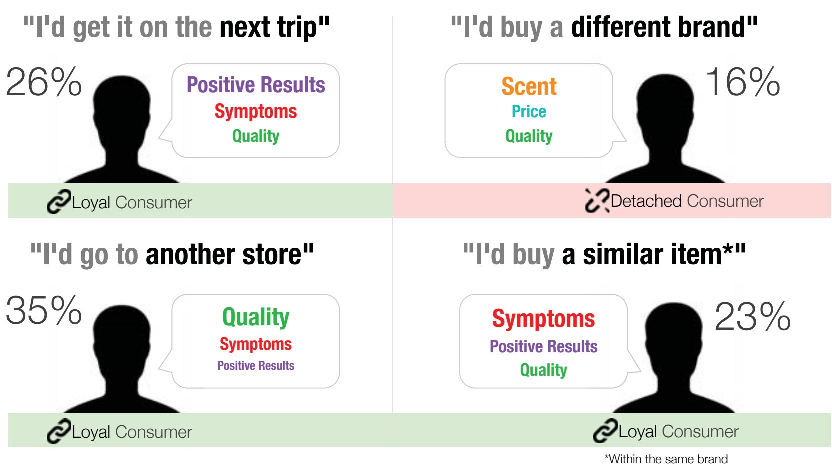
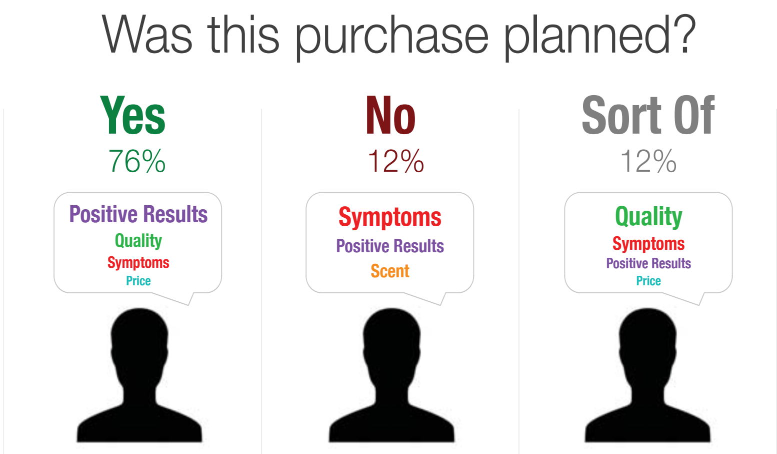


Figure 8



Head & Shoulders brand discussed product "scent," "price" and "quality." Potentially, hair care manufacturers looking to drive share growth should not only continue to drive quality and product results but also provide appealing scent options that capture more product switchers and differentiate their brands from any similarly competing brands.

Trends in purchasing behavior were revealed about the Head & Shoulders brand by segmenting and analyzing responses to a multiple-choice question regarding planned purchases (Figure 8). Those who planned the purchase of the product discussed "positive results" and "quality," while consumers who made an impulse purchase were much more likely to discuss "symptoms."

Quantify what drives variations

Scores alone are not the most accurate measurements of customer satisfaction, loyalty, experience or brand perception. In fact, scores are just the tip of the iceberg. A score is a perceived relative impression that provides limited insight into how or what a consumer is truly thinking. By incorporating qualitative data into research initiatives, it is possible not only to quantify what percentage of your customer base is pleased or displeased with your products and services but what drives variations in consumer sentiment.

Companies and market researchers should take careful consideration into how they go about deriving insight into consumers. Without a balanced methodology for taking the expressive open-ended survey responses against the structured components of a score, they might never discover the nuanced perception of their valuable consumer.

Ian Cain is the director of business development at Luminoso, a Cambridge, Mass., text analytics firm. He can be reached at icain@luminoso.com. Eli Orkin is a marketing associate at Luminoso. He can be reached at eorkin@luminoso.com. Jared Schrieber is CEO and co-founder of InfoScout, a San Francisco research firm. He can be reached at jared@infoscoutinc.com.

Names of Note

■ Columbia, Md., CRM firm *Merkle* has named **Yaakov Kimelfeld** as vice president, chief research officer, digital media; **Karima Zmerli** as vice president, digital data strategy, and **Zimm Zimmerman** as vice president, personalization solution leader.

■ **Suzanne Costa** has joined Toronto research firm *Verve North America* as senior vice president of operations.


Costa

■ Paris research company *Ipsos* has appointed **Diane Dickinson** as managing director of its New Zealand operations.

■ **Julia Godfrey** has been appointed research director of *Therapy Watch*, the market tracking service of Research Partnership. She had previously been a research manager for the company.

■ Paris research firm *Ipsos* has promoted **Alexandre Guerin** to president of Ipsos Loyalty in the U.S.

■ **Jim Sharples** has been named vice president at *Delta Marketing Dynamics*, a Syracuse, N.Y., researcher.

■ *Scientific Games Corporation*, New York, has appointed **Dan Savage** as vice president, corporate marketing.

quirks.com/articles/2014/20141112

■ Beijing marketing firm *Havas China* has named **Bryan Wang** as head of its social media unit, Socialyse.

■ *Federated Sample*, New Orleans, has added **Patrick Stokes** as executive director.


Stokes

■ *Competitive Edge Research*, San Diego, has hired **Neil Salunga** as research manager.

■ **Sarah Rossmann** has joined London research firm *Monkey See* as a research associate.

■ *Dun & Bradstreet*, New York, has appointed **Curtis Brown** as chief information officer.

■ Waltham, Mass., research firm *Affectiva* has named **Gabi Zijderveld** as its vice president of marketing.


Zijderveld

■ **Jackie Lorch**, *SSI's* vice president global knowledge management, has been named *ESOMAR* representative for the U.S.

■ The Singapore office of *Insight*, a London research firm, has hired **Preethi Gupta** as qualitative director and **Louisa Hills** as an associate.

■ *Norstat*, an Oslo, Norway, research company, has promoted **Matt Reynolds** to managing director for the U.K. market and also appointed **Elisabeth Sampaio** as senior project manager in the U.K.

■ *GlobalNR*, an international network of market research suppliers in 24 countries, has named **Alan Appelbaum** as chairman and **Douglas Ethe-Sayers** as president. Both are at *Market Probe International*, a New York research company.

■ **Ross Pinnegar** has joined the panel services department of London research firm *YouthSight*.

■ *Baidu*, the China-based search engine company, has hired **Ya-Qin Zhang** as president for new business.

■ London researcher *SPA Future Thinking* has promoted **Richard Barton** to group managing director and named four new divisional managing directors. **Steven King** and **Neil Aulton** will serve as managing director of the public sector and services division, **Chris Bland** will be managing director of media, marcomms, technology and retail, and **Claudia Strauss** will be managing director of FMCG and shopper.


Dobson

■ London researcher *BDRC Group* has named **Anthony Dobson** director at BDRC Asia in Singapore and **Shawn Roy** regional head of qualitative research at BDRC Asia.


Roy

■ **Linda Rebrovick**, CEO of Nashville, Tenn., research firm *Consensus Point*, has announced her bid for mayor of Nashville.

■ **Doreen Wang** has been promoted to global head of *BrandZ*, the brand

equity database of New York research firm Millward Brown.

■ **Mark Zahorik** has joined *Targetbase*, a Dallas research company.

■ **Matthew Froggatt** has joined London research company *Incite* as its new global head.

■ *IModerate Research Technologies*, Denver, has hired **Julia Eisenberg** as senior vice president of client services.

■ **Larry Solomon**, president of *Strategic Resources Inc.*, a research firm in Union, Ky., is a candidate for mayor of Union.

■ Horsham, Pa., research company *TNS* has appointed **Sarah Morris** as head of TNS qualitative in the U.K. In addition, **Jo Storry** will serve as head of TNS qualitative, China, and **William O'Connor** will be head of TNS qualitative, Canada.

■ New York researcher *Nielsen* has hired **Benjamin Hayes** as chief privacy officer.

■ **Mike Mansbach** has been named CEO at *PunchTab*, a Palo Alto, Calif., SaaS firm.

■ New York researcher *GfK MRI* has hired **Christie Kawada** as executive vice president, product management and innovation.

■ Washington, D.C., polling firm *Greenberg Quinlan Rosner* has promoted **James Morris** to partner in its London office.

■ *Charterhouse Research*, London, has hired **Kathy Ellison** as a director along with **Philippa Whitham** as an associate director.

■ Chicago research firm *Cogensia* has hired **Mindi Barber** as an account manager and **Ina Rajewski** as an account coordinator. Also, **Thomas Schar** has joined the company as IT director and **Bryan Endres**, **Shan Jiang** and **Angus Yang** have joined as senior analysts.

■ **Karen Chaudhari** has joined West Yorkshire, U.K., research agency *Platypus* as associate director.

■ London researcher *Populus Data Solutions* has hired **Chris Atkins** as head of business development.

■ **Melinda Smith Borrero** has joined *in4mation insights*, a Boston research firm, as managing director of client services and solution strategy.

■ **Shannon Smith** has joined *Jibunu*, a Leominster, Mass., research firm, as vice president of operations. In addition, **Elizabeth Lepisto** has joined as director of marketing and **Ken Berry** has assumed the role of president.

■ *BritainThinks*, a London research company, has hired **Saul Parker** as research director.

■ *Verve*, a London researcher, has hired **Rich Preedy** and **Olly Robinson** for international service positions; **Ben Kume-Davy** as research manager; and **Katalin Kekesi**, **Sumana Pernot**, **Hernan Farinas** and **Laura Martin-Carrera** as international community managers.

■ Denver technology company *Mobile Accord* has hired **John Muthee** as vice president of business development, Africa. He will be based in the recently-opened Nairobi office.

■ **Lindsay McEwan** has joined San Diego Internet firm *Tealium* in the newly created position of general manager EMEA.

■ **Ray Fischer** has been named CEO of *Aha! The DIY Platform for Online Qualitative Research*, Detroit.

■ **Doug Schorr** has rejoined Los Angeles research firm *Schorr Creative Solutions* as chief insight officer.

■ *Voccii*, a Charlotte, N.C., research firm, has hired **Mary G. Johnson** as research analyst and client support.

■ New York researcher *Repucom* has appointed **Jon Stainer** as managing director of U.K. and Ireland. He will be based in the London office.

■ *RMS Healthcare*, a division of Research and Marketing Strategies Inc., Baldwinsville, N.Y., has promoted **Al Tripodi** to quality auditor associate.

■ In London, the *Internet Advertising Bureau UK* has hired **Simon Hampton** as psychologist in residence for a three-month period to provide members with insights on mobile and digital behavior.

■ **Kristin Luck**, president and CMO of *Decipher*, a Fresno, Calif., research firm, received the gold award in the woman executive of the year category at the 2014 Golden Bridge Awards and also won an executive of the year Stevie Award at the 12th annual American Business Awards.

■ Norcross, Ga., researcher *Marketing Workshop* has hired **Vivian Harris** as vice president, client services.

■ **Andy Wardlaw** has joined *MMR Research Worldwide*, Oxfordshire, U.K., in the new role of insight director. Also joining the firm are **Lucy Brown** as sensory qualitative research manager; **Richard Goldsby-West** as survey programming team manager; **Kimberly Klerx** and **Matthew Browne** as senior research executives along with four research executives, **Jenna Spence**, **Claudia Fox**, **Dan Purchase** and **Valerie Palfi**.

■ *The Marketing Store*, Chicago, has hired **Rob Morgan** as senior vice president, global consumer data analytics practice.

■ **Christelle Fraysse** has joined London software company *Questback* as group director, marketing.

■ *NatCen Social Research*, London, has appointed **Sophie Ainsby** as director of field and **Donna Cullen** as director of finance.

■ West Sussex, U.K., research firm *Product Perceptions* has hired **Andy Grout** as a consultant.

■ **Charles Kennedy** was named to the newly created position of chief research innovation officer at the *Advertising Research Foundation*, New York.

■ Victoria, British Columbia, Internet firm *FunctionFox* has hired **Alfonso Estevez** to lead the design of user interfaces for its TimeFox time and project tracking software.

■ *EMI Research Solutions*, Cincinnati, has hired **Janet Miller** as sales and business development consultant.

■ At North Canton, Ohio-based *Sanctuary Marketing Group*, **Denise Bellis** has been promoted to director of client strategy, which includes marketing research and analysis and psychographics and social engagement.

■ **Pat McDonough**, senior vice president, planning policy and analysis at New York researcher *Nielsen*, plans to retire at the end of 2014.

■ Corvallis, Ore., researcher *InsightsNow* has hired **Dolores Oreskovich** as vice president, sensory and consumer insights.

■ *EMI Research Solutions*, Cincinnati, has appointed **Janet Miller** as business development consultant.

■ **Vidya Sen** has been promoted to head of innovation and forecasting business at *Ipsos InnoQuest* in Mumbai, India.

■ *In4mation insights*, Boston, has added **Melinda Smith Borrero** as managing director of client services and solution strategy.

■ Cincinnati-based *MarketVision Research* has hired **Sandy Leeson** as research manager on the data processing team; **Collier Devlin** as research associate on the information services team; **Lauren Yates** as research associate on the quantitative client services team; and **Lanie Ross** as human resource assistant. Also, **Elizabeth Woerly** and **Chad Moore** were promoted to research director of the client service team.

■ *CX Act Inc.*, a Rosslyn, Va., customer experience firm, has added **Gavin Winter** to its senior leadership team as vice president, strategic solutions.

Research Industry News

News notes

■ After 20 years as its editor, **Larry Gold** has discontinued publication of the monthly *Inside Research* newsletter. The publication was founded in 1990 by Jack Honomichl, who passed away late last year, to report on industry events, company business activities, personnel changes and financial news. Gold will continue to publish the AMA Gold Top 50.

■ **ESOMAR's Global Market Research Report 2014** revealed that European market research revenues declined to $16 billion in 2013, a net loss of 1.4 percent. This was the third consecutive year of declining revenues. The 2013 North American research total had a net growth of 2.9 percent, with $15.7 billion of revenue. The markets showing the greatest increases were Myanmar (an increase of 50 percent), Lebanon (38.4 percent) and Bangladesh (28.4 percent), while markets in Iraq, Cyprus and Portugal showed the greatest declines. However, 82 percent of the countries providing forecasts of 2014 markets expected their local market to grow.

■ Reston, Va.-based **comScore** will terminate its partnership with the **GSMA** mobile operators' trade association at the end of 2014. ComScore, GSMA and five U.K. operators have compiled the GSMA Mobile Media Metrics audience measurement service since 2009 and comScore has confirmed that all data through 2014 will continue to be available. ComScore will begin working with WKOM to launch a new service, Mobile Metrix.

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■ The board of the **Media Rating Council**, New York, has voted to remove accreditation for the National Consumer Study of Deerfield Beach, Fla.-based **Simmons Research**.

■ **The Cornell University School of Hotel Administration** featured several employees of Philadelphia researcher **LRA Worldwide**, including CEO Rob Rush, in its video on career opportunities for students.

■ Atlanta-based **CMI**, also known as ConsumerMetrics Inc., is celebrating 25 years as a research firm. It was founded by Chet Zalesky in 1989.

Acquisitions/transactions

■ **Metrostudy**, a Houston research firm, has acquired **New Home Trends**, a Bothell, Wash., research firm. New Home Trends will operate under the Metrostudy name and its president, Todd Britsch, will continue his executive role as regional director for the Seattle and Oregon region.

■ **Adelphi Worldwide**, Manchester, U.K., has acquired London-based health care brand and research agency the **Planning Shop international** for an undisclosed sum.

■ **Gap Intelligence** has acquired fellow San Diego market intelligence firm **Quixel Research**, which will now be re-branded as Quixel Research - a Gap Intelligence company. Terms were not disclosed.

■ New York researcher **Nielsen** has acquired New Delhi analytics and forecasting services firm **Indicus Analytics**. Terms were not disclosed.

■ **M-Brain** has purchased fellow Helsinki, Finland, research firm, **Global Intelligence Alliance**. The company will have offices in 12 countries with approximately 450 employees.

■ New York researcher **GroupM**, a division of WPP, has acquired **Keyade**, a Paris marketing firm. The three Keyade founders will continue operational control. Also, **Aqua**, a digital marketing division of WPP, has purchased fellow Johannesburg, South Africa, company **Applogix**, a technology firm.

■ **Netquest**, a Barcelona, Spain, research firm, has agreed to join with **Wakoopa**, an Amsterdam technology firm, which will become a fully-owned subsidiary of Netquest. The companies will remain separate entities with their own core projects but will explore ways of jointly providing better services to respondents and clients.

■ London-based **WPP** has invested $25 million in New York-based ad technology firm **AppNexus**. AppNexus will acquire the Open AdStream ad serving platform from Xaxis, the audience profiling and targeting division of WPP. WPP is also in talks regarding the acquisition of some divisions of Sao Paulo, Brazil, research agency **IBOPE Group**.

■ **Google**, San Francisco, has acquired software company **Polar**, San Francisco, for an undisclosed sum. The Polar team will be merged with the Google+ social network division

■ **Evalueserve**, a Gurgaon, India, researcher, has acquired **Beyond Data**, a Rheinbach, Germany, business intelligence firm.

■ **Teradata**, Dayton, Ohio, has acquired fellow technology company **Think Big Analytics**. Terms were not disclosed. The Think Big main office will remain in Mountain View, Calif., and will be renamed Think Big, a Teradata Company.

■ **Aimpoint Research**, Columbus, Ohio, has acquired the Rome offices of **CIELO**

Research as part of its expansion in the global market.

■ **Fluendo**, a Barcelona, Spain, software company, has acquired **LongoMatch**, a London software firm. Terms were not disclosed. The LongoMatch platform will be integrated into Fluendo's suite of products.

■ **Kantar Health** has acquired Brazilian health care research company **Evidencias**, which consists of two units, **Focus Assistencia Médica** and **Classe Assistencia Médica**.

■ San Jose, Calif.-based **1World Online** has purchased Monterrey, Mexico, polling firm **Flipter**. Current customers of Flipter will be transitioned to 1World's platform.

■ The management team of **QRS Market Research**, Hertford, U.K., has completed a company buyout from retiring director Sam Adby. Kathy Tomlin will replace Adby as managing director with Lee Tomlin and Sarah Hobley as senior directors.

■ Washington, D.C., **Optimity Advisors** has bought fellow management consulting firm **Matrix Knowledge**, London, now rebranded as Optimity Matrix. It will run the public policy arm of Optimity Advisors' global operations.

■ **Y&R Advertising**, New York, has acquired the creative and research agency of **MCS Holding**, Ulaanbaatar, Mongolia. Also, Kansas City, Mo., marketing firm **VML** has agreed to acquire Shanghai-based social media specialist **Teein**. Both Y&R Advertising and VML are owned by London-based WPP.

Alliances/strategic partnerships

■ Research advisory company **Cambiar** has merged with **Transition Strategies Corporation**, Pennington, N.J. It will continue to operate under the Cambiar name. Simon Chadwick and Michael Mitrano will serve as co-managing partners.

■ **MarketResearch.com**, Rockville, Md., has partnered with **BIS Research**, Bloomington, Minn.; **MPO Research Group**, Washington, D.C.; and **MarketSizeInfo.com**, Lahti, Finland, to market and distribute their proprietary market analyses through the MarketResearch.com site.

■ **Unity Marketing**, Stevens, Pa., and **American Affluence Research Center**, Atlanta, are partnering to conduct a study, the Millionaire Market Monitor, which will examine the mind-set and lifestyle of millionaires, high-net-worth and ultra-high-net-worth consumers.

■ Shelton, Conn., research firm **SSI** is partnering with **Air France-KLM** airlines to enable members of its loyalty program, Flying Blue, to join SSI's business research panel, Opinion Rewards Club.

■ **Market Publishers Ltd.**, London, and **Reevolv Advisory Services Private Limited**, Mumbai, India, are partnering to allow the Reevolv research reports to be distributed and sold on the Market Publishers Web site.

■ **Information Services Group** (ISG), a Stuart, Fla., research company, has partnered with Seattle software provider **Apptio**. The move will allow users of the Apptio technology business management applications to access ISG's database of operational metrics. ISG will open a practice dedicated to joint solutions for business management applications and the two companies will collaborate on marketing.

■ **MRSS India**, a Mumbai, India, researcher and Berlin technology company **SensoMotoric Instruments** (SMI) will partner to integrate the SMI eye-tracking software with MRSS services. The addition is designed to help clients understand consumer purchase decisions, Web site use and customer response to advertising.

■ Germany-based **GfK Enigma** and **Media Markt Analysen**, Frankfurt, Germany, will merge and take the name GfK Media and Communication Research. Its managing directors will be Bettina Klumpe and Armin Müller-Schroth and the company's offices will remain in Wiesbaden and Frankfurt.

Association/organization news

■ **The Council of American Survey Research Organizations**, Port Jefferson, N.Y., has enacted its revised Code of Standards and Ethics following its review and approval by more than two-thirds of the 325 member companies. The revised code is designed to address several significant changes in research techniques and practices, including transparency, work with children and youth and standards for e-mail and text message solicitation.

Awards/rankings

■ **ESOMAR** has named Germany-based **GfK** and **Viacom International Media Networks**, New York, as winners of the Best Methodological Paper award. Their joint paper, called Comedy Central Power of Laughter, was judged to show the greatest technical and innovative interest.

■ **NGDATA**, a Gent, Belgium, software company, has been selected as the **Ventana Research Technology Innovation** award winner within the Service and Supply Chain category.

■ **RTi Research**, Stamford, Conn., was named a 2014 Connecticut Top Workplace by **Hearst Connecticut Newspapers**. The awards were based upon an employee survey completed in April by Workplace Dynamics.

■ London research software company **E-Tabs** was presented with the Best Exhibitor Award at the 2014 **ESOMAR Congress**.

■ **Research Now**, Plano, Texas, received the **ESOMAR Excellence Award** for Best Paper of the Year for its publication Multimode, Global Scale Usage: Understanding Respondent Scale Usage across Borders and Devices. **BVA**, a Boulogne, France, researcher won the ESOMAR Best Case History Award for its paper French Government: Nudge Me Tender. The awards were made at the 2014 ESOMAR Congress.

■ London researcher **Cobalt Sky** received the MRS award for Operational Excellence at the **MRS Operations Awards 2014**.

New accounts/projects

■ **Research & Marketing Strategies, Inc.**, Baldwinsville, N.Y., received conditional approval to administer the **Hospice Consumer Assessment of Healthcare Providers and Systems** survey beginning in 2014-2015. Final approval was contingent on attendance at an early October training session.

■ Portland, Ore., researcher **Rentrak** has reached an agreement with IndiaCast of **Viacom 18 Media Pvt. Ltd.** to provide ratings for its two networks, Aapka Colors and MTV India.

New companies/new divisions/relocations/expansions

■ Chicago researcher **watchLAB Field** has changed its name to **FUEL Global**.

■ Netherlands researcher **MetrixLab** has opened an office in Sao Paulo, Brazil. Rebeca Dreicon will head the office

■ Little Rock, Ark., technology company **Acxiom** is opening a new office in Austin, Texas.

■ In Cincinnati, **c2b** solutions has opened as a researcher focused on health care insights and strategy.

■ Tim Mahaffey has launched **Retail Passage**, a brand strategy firm, in McKinney, Texas.

■ **BDRC Group** has announced the opening of an office in Jakarta, Indonesia, which will be led by Piers Lee, who also heads up the Singapore office.

■ Paris technology firm **Capgemini** has opened a digital innovation lab in Melbourne, Australia.

■ Chicago-based researcher **InContext Solutions** has opened a London office, led by Alki Manias.

■ New York researcher **Millward Brown** has launched Millward Brown Vermeer Australia, Sydney, bringing its number of worldwide offices to 10. It will be led by Caspar Wright.

■ Paris software firm **Askia** has opened a new office in Los Angeles, to be headed by Jamey Corriveau, director of U.S. operations.

■ Seattle Internet firm **AudienceScience** has opened an office in Pune, India.

■ London researcher **Carnegie Orr** has repositioned itself with a new name, **Gather**, and has hired Nigel Forsyth as a non-executive chairman.

■ Los Angeles researcher **uSamp** has expanded its office in Frankfurt, Germany, and has added Susanne Minneker and Catherine Gibbon to the staff. The office was previously a sales-only facility.

■ Tiffany St. James and Charlie Southwell have launched **Transmute**, a London marketing firm.

■ Steve Wolf has opened **Wisdom, Insight and Mojo**, a New York research firm.

Research company earnings/financial news

■ San Francisco researcher **Radius** has raised $54.7 million in Series C funding.

■ London research company **Cello** reported a 9.4 percent increase in revenues, resulting in revenues of £78.3 million for the first half of the year. Cello Health, which is comprised of Cello Health Insight, Cello Health Consulting, Cello Health Communications and Cello Health Consumer, saw its profits grow by 13.4 percent to £19.7 million.

■ Tokyo-based **GMO Research** has been approved for listing on Mothers (market of the high-growth and emerging stocks), part of the Tokyo Stock Exchange, effective October 21.

■ London researcher **BrainJuicer** reported revenue growth up 4 percent to £11.2 million for the first half of 2014 with operating profits rising 18 percent to reach £1.5 million.

■ In Spain, consumer analytics company **Conzoom** has closed a €600,000 funding round.

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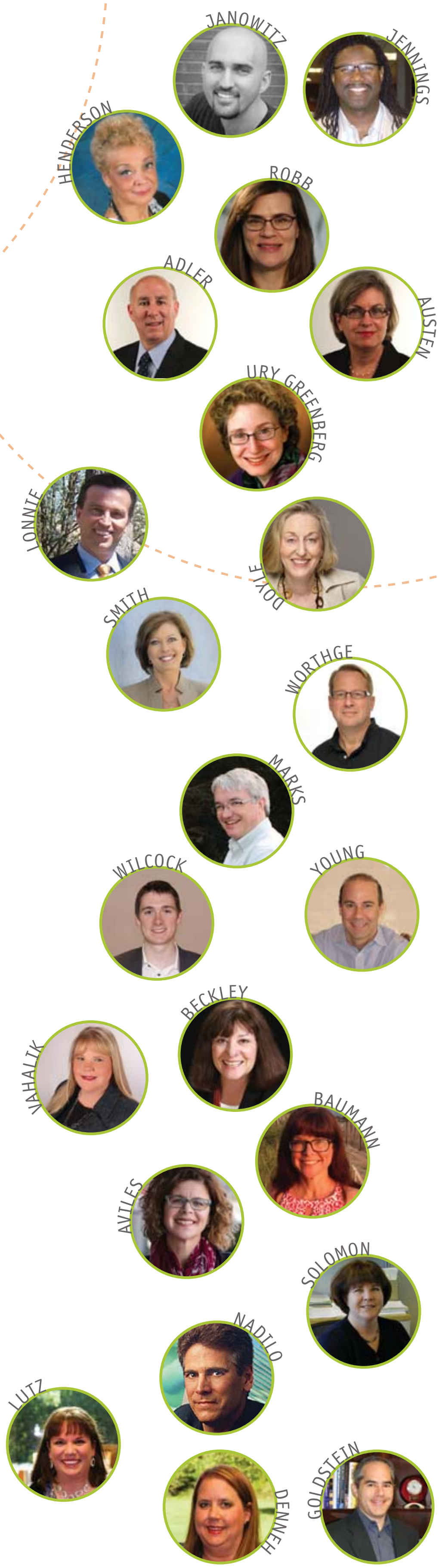


Here are just a few of the workshops to be held:

Breaking Barriers – Combining Innovation, Research and Customer Communities
Paul Janowitz, *CEO, icanmakeitbetter*
Barry Jennings, *Head of Market Research & Competitive Intelligence, BlackBerry*

How Clients and Vendors Can Get the Most Out of Working with Each Other
Naomi Henderson, *CEO, RIVA Market Research & Training Institute*

Making Healthy Marketing Research and Food Decisions
Karen Robb, *Manager, Customer and Marketing Research, American Heart Association*
Jeff Adler, *Managing Director - Primary Market Research Practice Lead, Centrac - A Division of Veris Consulting*
Maureen Austen, *Senior Manager, Primary Research Group, Centrac - A Division of Veris Consulting*

Fostering Creativity Through Co-Creation
Linda Ury Greenberg, *Director for Marketing Research, Columbia University*
Kevin Lonnie, *CEO & Founder, KL Communications*

Fire the Moderator! Why You Don't 'Have to be There.' Tech-Driven Self-Ethnography
Kathy Doyle, *President, Doyle Research Associates Inc.*

Young, Mobile & Powerful: How Apple's Competitors Can Win Market Share by Wooing the Youth Market
Jeri Smith, *President & CEO, Communicus*

Stories from the Leading Edge of Mobile: What's Working (and not!) for Advanced Mobile Research
Scott Worthge, *Vice President, uSamp*

Getting Comfortable with Mobile Games for Market Research: A Case Study Involving Movies
Joe Marks, *Founder, Upfront Analytics*

Bringing Eye-Tracking to the Store, the Web & the Smartphone: Understanding the Mobile Shopping Experience
Scott Young, *President, Perception Research Services*

Comparing Apples to Pommes: Understanding and Accounting For Cultural Bias in Global Research
Conor Wilcock, *Research Director, B2B International*

Mouth Behavior – a New Discovery That Changes Product Communication Strategy
Jacqueline Beckley, *CEO, The Understanding & Insight Group LLC*
Jennifer Vahalik, *Director, Products Research Technologies, U&I Collaboration LLC*

Leveraging Metaphor to Determine What Women Really Want from Health Care Using Revelation's Digital Immersion Platform
Sandra Bauman, *Principal & Founder, Bauman Research & Consulting*
Mary Aviles, *Consultant, Bauman Research & Consulting*

Mindmatch: Using Research and Big Data to Optimize Digital
Debbie Solomon, *Managing Director, Marketing Science, Mindshare*

StoryTelling - Clearly Communicate Complex Data
Rudy Nadilo, *President North America, Dapresy*

New iPad Qual/Quant System Propels Innovation Success
Jeff Goldstein, *President, AcuPOLL Precision Research, Inc.*
Ericca Denneh, *Vice President, Account Management, AcuPOLL Precision Research, Inc.*
Beth Lutz, *Director of Account Management and Innovation, AcuPOLL Precision Research, Inc.*

CALENDAR OF EVENTS

••• can't-miss activities

The 13th Annual Text Analytics Summit West conference will be held on November 4-5 at the Hotel Kabuki in San Francisco. Visit http://textanalyticsnews.com/west/

The Market Research Society will hold an event, themed "Harnessing open data for business advantage: Examples of value extracted from the Census and other open sources," on **November 5** at the Hallam Conference Centre in **London**. Visit www.mrs.org.uk/event/course/2436.

Market Research in the Mobile World will hold its inaugural Africa conference on **November 5-6** in Cape Town. Visit www.mrmw.net/africa.

The Research Club will host a networking event on **November 6** in **Cologne, Germany**. Visit https://www.theresearchclub.compage/108/?event=12527005611.

IIR will hold its annual conference focused on future trends on November 11-12 at the SLS Hotel in Beverly Hills, Calif. Visit http://www.iirusa.com/futuretrends/home.xml.

Worldwide Business Research will hold a conference, themed "ProcureCon for Digital and Marketing Services," on November 15-17 in Dallas. Visit www.procurecondm.com.

ESOMAR will hold its Qualitative Research Conference on November 16-18 in Venice, Italy. Visit http://www.esomar.org.

The New England Chapter of the Marketing Research Association will hold an event, themed "Advancing market research – challenging the norm," on **November 18** in **Waltham, Mass**. Visit http://newenglandmra.com/nemra-event/fall2014/.

Predictive Analytics & Business Insights 2014 will be held on November 19-20 in San Francisco, Calif. Visit http://www.predictiveanalytics2014.com.

Unicom will host a conference, themed "Real-Time Analytics & Operational BI" on November 27 in London. Visit http://conferences.unicom.co.uk/real-time-analytics/index.php.

The Neuromarketing Theory and Practice Conference will hold its Market Research Exchange conference on December 2-3 in London. Visit http://www.neuromarketingtheorypractice.com/events.

The International Quality and Productivity Center (IQPC) will hold its Market Research Exchange conference on December 3-5 at the Ritz Carlton, Amelia Island, Fla. Visit www.marketresearch-exchange.com.

The International Quality and Productivity Center will hold its annual customer experience summit on December 8-10 in New Orleans. Visit http://bit.ly/1qMguqT.

The Strategy Institute will hold its Digital Marketing for Financial Services Summit on December 9-10 in New York. Visit www.financialdigitalmarketingus.com.

Corp Events will host its annual conference, themed "Data Marketing 2014: Unlocking the Power of Your Customer Information," on December 10-11 at the Eaton Chelsea Hotel in Toronto. Visit www.datamarketing.ca.

Toluna will host a Webinar, titled "Coupling a branded community approach with social media data to deepen insight – a case study with Discovery Channel," on December 11 at 1 p.m. EDT. Visit http://bit.ly/1pMorPI.

The Neuromarketing Science and Business Administration (NMSBA) will hold a conference titled, "Neuromarketing Theory and Practice" on January 26-27 in San Francisco.

IIR will hold the Media Insights and Engagement Conference on February 3-5 at the Westin San Diego, San Diego, Calif. Visit http://www.iirusa.com/mediainsights/home.xml.

The 2015 Pharma Market Research Conference (U.S.) will be held on February 4-5 at the Hilton Parsippany Hotel, Parsippany, New Jersey. Visit http://pharmamarketresearchconference.com.

The Council of American Survey Research Organizations will hold its digital research conference on February 11-12 in Nashville. Visit http://www.casro.org/?15drp.

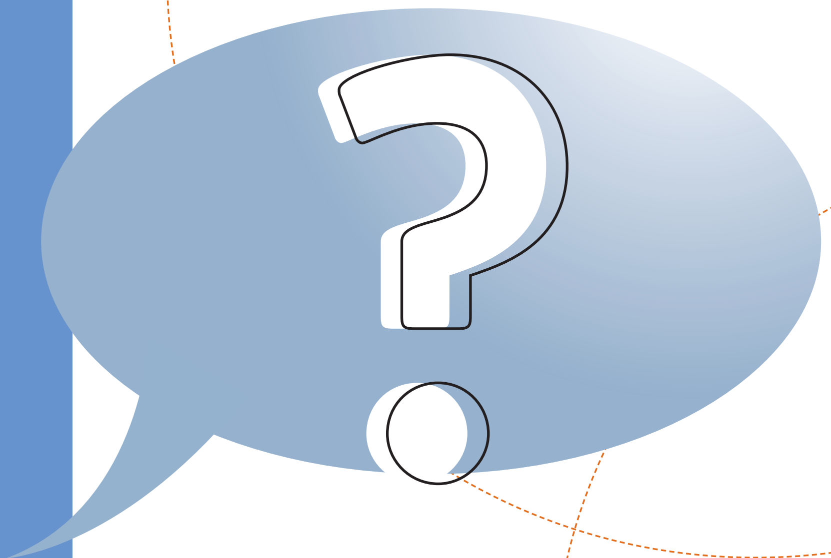
Worldwide Business Research will hold its 2015 mobile shopping conference on **February 11-12** at the American Square Conference Centre, **London**. Visit http://wbresear.ch/qud.

Worldwide Business Research will hold its flagship conference, "eTail West" on **February 17-20** at the JW Marriott Palm Desert Resort and Spa in **Palm Desert, Calif**. Visit http://www.etailwest.com.

The Quirk's Event 2015 will be held on February 23-24 at the New York Marirott at the Brooklyn Bridge in Brooklyn. Visit quirks.com/theevent.

The Sawtooth Software Conference 2015 will be held on **March 25-27** at the Loews Portofino Bay Hotel in Universal Orlando, **Orlando Fla**. Visit http://bit.ly/1vT1dIb.

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



Questions you should ask when selecting a panel provider

Recruitment

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

Opting in

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

Sources

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

quirks.com/articles
ID 20091116

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.

2014 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 91, 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.
The Other Sampling Company™

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 Consumer Panel
Size: 4,000,000
Affordable Samples Online Business Panel
Size: 1,500,000

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. 54)

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

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

AMERICAN CONSUMER OPINION®

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
Executive Advisory Board
Size: 100,000
Contractor Advisory Board
Size: 20,000
Medical Advisory Board
Size: 35,000
Technology Advisory Board
Size: 125,000
Physician's Advisory Council
Size: 25,000

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:
Panelspeak Business and Consumer Panel
Size: 150,000
SBO
Size: 8,000
Panelspeak Technology Panel
Size: 20,000
Census Balanced Omnibus Panel
Size: 1,000

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

Ann Michaels & Associates Ltd.
Naperville, IL
Ph. 866-703-8238
mhynd@annmichaelsltd.com
www.ishopforyou.com/
Proprietary Panel Mgmt.: Yes

ARCS

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. 13)

Ashcraft Research, Inc.
Chicago, IL
Ph. 312-553-0034
AshResInc@aol.com
www.ashresinc.com
Laurie Ashcraft,

Ashcraft Research, Inc. is a full service marketing research firm specializing in branding, new product development, category A&U's, and segmentation studies in consumer and business categories. With Ashcraft Research, Inc. as your marketing research partner, you'll open doors (and your project) to innovative design, thoughtful questionnaire development, tabulation, statistical planning, actionable analysis, reporting and presentation. Contact Laurie Ashcraft today for a thoughtful proposal.

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

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

Beta Research Corporation
Syosset, NY
Ph. 516-935-3800
gdisimile@betaresearch.com
www.BetaResearch.com
Proprietary Panel Mgmt.: Yes

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 - Russia - Consumer & B2B
Size: 150,000
Borderless Access Panels - India - Consumer & B2B
Size: 400,000
Borderless Access Panels - South Africa Consum/B2B
Size: 75,000
Borderless Access Panels - Taiwan- Consumer & B2B
Size: 20,000
Borderless Access Panels - Indonesia Consumer/B2B
Size: 65,000
Borderless Access Panels - China - Consumer & B2B
Size: 225,000
Borderless Access Panels - Mexico - Consumer & B2B
Size: 150,000
Borderless Access Panels - Turkey - Consumer & B2B
Size: 30,000
Borderless Access Panels - Brazil - Consumer & B2B
Size: 200,000
Borderless Access Panels - South Korea Consum/B2B
Size: 15,000
Borderless Access Panels - Argentina Consumer/B2B
Size: 60,000

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

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

C+R Research
Chicago, IL
Ph. 312-828-9200
info@crresearch.com
www.crresearch.com
Robbin Jaklin, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
ParentSpeak
Size: 7,800
KidzEyes.com
Size: 10,000
TeensEyes.com
Size: 13,600
LatinoEyes.com
Size: 2,600

At C+R Research, a full-service marketing insights agency, we've been helping brands grow for over 50 years by delivering great research, deep perspective and committed client service. We're known for best-in-class methodologies, high-quality analytical insights and delivering senior-level attention throughout every phase of our clients' projects. We offer an array of customizable techniques, and have focused areas of knowledge and expertise in youth and family, Latinos and shopper insights. Our goal is to equip our clients with the insights to confidently develop successful brand strategies and grow their business.

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 and Fulfillment
Proprietary Panel Mgmt.: Yes
Panel Titles:
VO!CE of the Region
Size: 13,000

Canadian Viewpoint, Inc.
Richmond Hill, ON
Canada
Ph. 905-770-1770 or 888-770-1770
jason@canview.com
www.canview.com
Jason Zweig, VP of Online Operations
Panel Titles:
Canadian Viewpoint Consumer Panel
Size: 260,000+
Canadian Viewpoint Physician Panel
Size: 11,000

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+

CatalystMR delivers industry-renowned panels made up of consumers, B2B, heath 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
www.touchstoneresearch.com/child_research
Steve Burch, President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Childresearch.com Panel

Cido Research
Mississauga, ON
Canada
Ph. 416-503-4343
Roland.Klassen@cidoresearch.com
www.cidoresearch.com
Lisa Wright, VP, Sales/Client Services
Panel Titles:
Ethnic Voice Accord (EVA)
Size: 30000

Cint USA Inc.
Lawrenceville, NJ
Ph. 609-557-7021
learnmore@cint.com
www.cint.com
Proprietary Panel Mgmt.: Yes
Panel Titles:

Cint Engage is a panel management solution that allows you to create, build, analyze and monetize your audience. Like all Cint solutions, Cint Engage connects to OpinionHUB. All panels hosted by Engage are part of this ecosystem. So, in addition of using your panel to conduct your own research, you can also earn money by allowing others to access your group/s to conduct market research studies and keep your audience engaged. Because of this unique business model you will be able to use Cint Engage at no cost as long as you choose to have your panel available to receive market research studies.

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
CRS Families ePanel
Size: 1,500

Clear Seas Research
myCLEARopinion Panel
Troy, MI
Ph. 248-633-4930
info@mcopanel.com
www.myclearopnionpanel.com
Ariane Claire,
Proprietary Panel Mgmt.: Yes
Panel Titles:
myCLEAROpinion
Size: 500,000+

myCLEARopinion specializes in high-quality B-to-B industry sample, providing access to a unique and powerful audience of decision-makers for your research projects. Our responsive and active panel members form a carefully nurtured online community. Areas of expertise include: architecture/construction/maintenance; HVACR; flooring/floor maintenance; plumbing; safety and security; manufacturing and logistics; food and 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.
(See advertisement on pp. 30-31)

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 Consumer
Clear Voice Business
Clear Voice Medical

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.

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

CM Research
Epsom
United Kingdom
Ph. 44-1372-270-041
contact@cm-research.com
www.cm-research.com
Carlos Michelsen,
Panel Titles:
Veterinary professionals in the UK
Size: 1750
Veterinary professionals in Sweden
Size: 330
Veterinary professionals in Finland
Size: 220
Veterinarian nurses in the UK
Size: 750
Veterinary professionals in Germany
Size: 2100
Veterinary professionals in Czech Republic
Size: 500
Veterinary professionals in Poland
Size: 580
Veterinary professionals in Denmark
Size: 325
Veterinary professionals in Spain
Size: 1400
Veterinary professionals in France
Size: 2000
Veterinary professionals in Italy
Size: 1700
Veterinary professionals in Belgium
Size: 730
Veterinary professionals in Netherlands
Size: 560
Veterinary professionals in Switzerland
Size: 300

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

CRC Research
Vancouver, BC
Canada
Ph. 604-714-5900 or 866-455-9311
info@crcresearch.com
www.crcresearch.com
Jessica Gibson,
Proprietary Panel Mgmt.: Yes
Panel Titles:
CRC Health
Size: 125,000
CRC Consumer and B2B
Size: 90,000

CRG Global, Inc.
Administrative/Focus Facility
Ormond Beach, FL
Ph. 866-209-2553 or 386-677-5644
crgsales@crgglobalinc.com
www.crgglobalinc.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Datatelligence Online
Size: 400,000

Critical Mix
United entity of reInvention, Authentic Response and Critical Mix
Westport, CT
Ph. 203-635-0260
simplify@criticalmix.com
www.criticalmix.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
My View
Zoom Panel
Live Mind
One Opinion

CSS/datatelligence
Ormond Beach, FL
Ph. 866-209-2553 or 386-677-5644
csssales@crgglobalinc.com
www.cssdatatelligence.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Datatelligence Online
Size: 400,000

Datatelligence Online
Ormond Beach, FL
Ph. 866-209-2553 or 386-677-5644
sales@datatelligence.com
www.datatelligence.com
Jeffrey Fiesta,
Proprietary Panel Mgmt.: Yes
Panel Titles:
Datatelligence Online
Size: 400,000

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 OpinionÂ®
Size: 8,000,000
Technology Advisory Board
Size: 125,000
Executive Advisory Board
Size: 100,000
Physician's Advisory Council
Size: 25,000
Medical Advisory Board
Size: 35,000
Contractor Advisory Board
Size: 20,000

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 Johnasen, VP Sales and Marketing
Proprietary Panel Mgmt.: Yes
Panel Titles:
DoctorDirectory Prescriber and other HCP Panel
Size: 700,000

eCGlobal Solutions
Miami Beach, FL
Ph. 786-269-0377
contact@ecglobalsolutions.com
www.ecglobalsolutions.com/
Proprietary Panel Mgmt.: Yes
Panel Titles:
eCGlobal.com
Size: 1,100,000

EMI - Research Solutions
Cincinnati, OH
Ph. 513-871-1178
sales@emi-rs.com
www.emi-rs.com
Jason Scott, EVP, Global Accounts
Panel Titles:
Online Global B2B
Size: 10,000,000
Online Global B2C
Size: 65,000,000
Online Global Healthcare
Size: 9,000,000

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

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: 318,000

Esearch.com, Inc.
Palos Verdes Peninsula, CA
Ph. 310-265-4608
esearch@esearch.com
www.esearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Esearch Consumer Panel (U.S.)
Esearch Business/IT Panel
Esearch Children/Teens Panel

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. 59)

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 Growing Families
Size: 35,000
SmartPanel of Consumers
Size: 850,000

Focus Pointe Global - Online
Philadelphia, PA
Ph. 215-561-5500 or 888-873-6287
OneCall@FocusPointeGlobal.com
www.focuspointeglobal.com
Ileen Branderbit, Executive VP
Proprietary Panel Mgmt.: Yes
Panel Titles:
FPG Patient Panel
Size: 900,000
FPG QualPanel
Size: 1,500,000

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: 3,651,211
Focus World Ethnic Panel
Size: 1,001,003
Focus World Consumers Nationwide Panel
Size: 6,831,226

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

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

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
Panel Titles:

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. 13)

GfK
New York, NY
Ph. 212-240-5300
us@gfk.com
www.gfk.com
Pat Graham,
Proprietary Panel Mgmt.: Yes
Panel Titles:
National Shopper Lab
Size: 17,000,000
Physicians Consulting Network (PCN®)
Cada Cabeza℠
Size: 9,000
KnowledgePanel Latino ℠
Size: 9,000
Consumer Access Panel
Size: 1,000,000
KnowledgePanel®
Size: 60,000

GfK is one of the world's leading full-service market research companies, with 13,000 experts discovering new insights into the way people live, think and shop, in over 100 countries. Several of our country-specific panels track online Web behavior and also include mobile capabilities through GfK's leading-edge .dx capabilities, device agnostic approaches and mobile app based solutions. We offer access to gen pop, consumer, Hispanic, physician and loyalty card panels, as well as to several of the world's largest databases. In the US, KnowledgePanel offers the only large scale probability-based online panel in the industry for clients most critical research.

GLocal Mind Inc.
Frisco, TX
Ph. 215-366-2787 or 646-290-6655
vrinda.d@glocalmind.com
www.glocalmind.com
Sandeep Sankhla, Managing Partner
Proprietary Panel Mgmt.: Yes
Panel Titles:
Pharmacists
Size: 25,000
Nurses Panel
Size: 35,000
Physician Panel
Size: 700,000

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 Teen Panel
Harris Poll Online
Harris Interactive Chronic Illness Panel
Harris Interactive Physician Panel
Harris Interactive Technology Decision Makers
Harris Interactive Gay, Lesbian & Bisexual

InsightLab.hu Market Research Ltd.
Budapest
Hungary
Ph. 36-1-269-0394
info@insightlab.hu
www.insightlab.hu
Panel Titles:
InsightLab.hu
Size: 100,000

IntelliQ Research
State College, PA
Ph. 814-234-2344
infoB2B@intelliQresearch.com
www.intelliqresearch.com
Panel Titles:
Diagnostics Plus Healthcare Panels
Size: 7,000

Inter@ctive Market Research srl
80127 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

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: 1,261,000
InterfaceAsia B2B / IT
Size: 347,000
InterfaceAsia Medical (Physician)
Size: 237,000
InterfaceAsia Medical (Patients)
Size: 118,000

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

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 (USA HQ) / Ipsos ASI / Ipsos Interactive Services / Ipsos Marketing / Ipsos Mendelsohn / Ipsos
New York, NY
Ph. 212-265-3200
info@ipsos-na.com
www.ipsos-na.com
Panel Titles:
Asia Pacific Panel
Size: 1,507,700
Ipsos North America Online Panel
Size: 680,000
Ipsos U.S. HTI Panel
Size: 350,000
European Online Panel
Size: 1,660,500
Latin American Online Panels
Size: 995,500
Ipsos CDN CPC Access Panel
Size: 80,000

itracks
Saskatoon, SK
Canada
Ph. 306-665-5026 or 888-525-5026
sales@itracks.com
www.itracks.com
Dan Weber, CEO
Panel Titles:
Itracks USA Talk Now
Itracks Canada Talk Now

Kinesis Survey Technologies, LLC
Austin, TX
Ph. 512-590-8300
sales@kinesissurvey.com
www.kinesissurvey.com
Proprietary Panel Mgmt.: Yes

Kinesis Panel offers the most intuitive, drag and drop query tool with state-of-the-art sampling capabilities. Kinesis Panel facilitates the creation of communities that offer minipolls, social media, real-time incentive redemptions and much more to keep members responsive, and on any device they choose.Whether you use existing data to build a panel, or start from scratch, Kinesis has you covered with real-time reporting, state of the art security, and even monetization options for excess panelists. Combine with the incredible programming and management services offered by Kinesis, and you have the industry's best Panel Management service provider.

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

KL Communications are experts in online co-creation communities. These are communities that have all the functionality of traditional MROCs (e.g. surveys, forum discussions) but also features CrowdWeaving, our integrated ideation module that powers true collaboration. KLC provides our clients with a full-service, strategic partnership that is supported and enabled by technology and ensures insight, value, and innovation. Start creating with customers, not just for them!

L & E Research
Cincinnati, OH
Ph. 877-344-1574
bidrequest@leresearch.com
www.leresearch.com
Lindsay Marsden, Account Manager
Proprietary Panel Mgmt.: Yes

Lightspeed GMI
Warren, NJ
Ph. 908-605-4500
info@lightspeedresearch.com
www.lightspeedGMI.com
Bonnie Breslauer, EVP, Client Relations
Proprietary Panel Mgmt.: Yes
Panel Titles:
Lightspeed Consumer Panel
Lightspeed Health and Wellness Specialty Panel
Lightspeed Finance Specialty Panel
Lightspeed Mobile Phone Specialty Panel
Lightspeed Beauty & Personal Care Specialty Panel
Lightspeed Sports and Hobbies Specialty Panel
Lightspeed Travel and Leisure Specialty Panel
Lightspeed B2B ELITEOpinion Specialty Panel
Lightspeed Media Consumption Specialty Panel
Lightspeed Automotive Specialty Panel
Lightspeed Beverages Specialty Panel
Lightspeed Family & Household Specialty Panel

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

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

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 x9203 or 202-441-5522
MarketResearch@usa.m3.com
www.research.m3.com
Panel Titles:
MDLinx Online Physician Community Japan
MDLinx Online Physician Community Korea
MDLinx Online Physician Community Europe Plus
MDLinx Online Physician Community China
MDLinx Online Physician Community USA

M3 Global Research offers an ISO 26362 Certified panel of more than 2.5 million verified, worldwide physicians differentiated into more than 700 subspecialties to deliver accurate and cost effective medical market research studies. We utilize the highest quality data collection and project management capabilities that cover the spectrum of quantitative, qualitative and mobile. For RFQs please email marketresearch@usa.m3.com.
(See advertisement on p. 45)

Macromill China, Inc.
Shanghai
China
Ph. 86-21-6355-0303
sales@cn.macromill.com
www.macromill.com/global/
Tetsuya Shinoda, General Manager
Panel Titles:
China Panel
Size: 5,288,200

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
Macromill Japan Panel
Size: 1,071,511
Macromill South Korea Panel
Size: 270,938

Macromillembrain
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

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

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. 13)

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

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

Mars Research
Ft. Lauderdale, FL
Ph. 954-654-7888 or 877-755-2805
joyceg@marsresearch.com
www.marsresearch.com
Joyce Gutfreund, SR VP
Proprietary Panel Mgmt.: Yes
Panel Titles:
Market Research Online Community
Size: 100,000
Mars General Consumer Panel
Size: 250,000

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

The Medical Panel™
Denver, CO
Ph. 303-830-2345
info@themedicalpanel.com
www.TheMedicalPanel.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
TheMedicalPanel.com
Size: 500,000

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

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

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 Health Ailment & Condition
MindField General Consumer Panel
MindField Homeowner and Lawncare Panel
MindField Mothers - Children Panel
MindField Electronics and Gaming Panel
MindField Health and Beauty Aids Brand Panel
MindField Medical: Physician and Patient Panels
MindField Pet Owner Panel
MindField Travel and Leisure Panel
MindField Vision Care Panel
MindField Technology
MindField Teen Panel

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. 27)

Minter Research
Mona Vale, NSW
Australia
gminter@minter.com.au
www.minter.com.au
Geoff Minter, Managing Director
Panel Titles:
Minter Group Panel - Consumer
Size: 7,500
Minter Group Panel - Health Care
Size: 25, 500

The Minter Group is independently owned with Customer Service Monitors and Minter Research as full service agencies, delivering quality research from different countries using trained, native born, multilingual interviewers across the region. Over 50,000 interviews in Australia and Asia since 2000 partnering global clients (including Fortune 500) and agencies since 1981 - both qualitative ie TDIs (across Asia), IDIs & FGDs (across Australia) and quantitative (telephone, Web-based) research. Minter merges the skills of its principals' backgrounds in marketing, psychology, advertising, finance and IT to provide solutions to marketing issues.

mo'web GmbH
Dusseldorf
Germany
Ph. 49-211-8-28-28-00
info@mo-web.net
www.mo-web.net
Proprietary Panel Mgmt.: Yes
Panel Titles:
Consumer Panel
Size: 800,000
B2B Panel
Size: 340,000

mo'web research is one of the very first German market research institutes specialized in online research. We cater to all your market research requirements - from a simple needs assessment through to full service research. With over 800.000 private consumers and just above 340.000 business decision makers in our proprietary panels you can explore even the most exotic target groups. Take advantage of our global reach and contact your respondents in Europe, Africa and Latin America. All through an independent company which is still managed by the founders.

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
MyPoints Consumer Panel
MyPoints B2B/IT Panel

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:
UK Panel
Size: 100,000
French Panel
Size: 400,000
German Panel
Size: 75,000

Netquest
New York, NY
Ph. 323-812-1967
americas@netquest.com
www.netquest.com
Bruno Paro, Managing Director USA & Canada
Proprietary Panel Mgmt.: Yes
Panel Titles:
Bank Panel
Size: 107,339
B2B Panel
Size: 108,420
Healthcare Panel
Size: 70,199
Mums/Family
Size: 32,678
Consumers Panel
Size: 157,874
Automotive Panel
Size: 110,366

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

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

Olson Research Group has been supporting the life sciences sector for nearly 2 decades by providing both qualitative and quantitative market research services and harnessing the latest technological offerings. What drives our deliverables is our proprietary database of HEALTHCARE PROFESSIONALS, PAYERS and PATIENTS who represent all corners of the healthcare space. The database is continually refreshed with new participants and thus differs from static panels that reach out to the same respondents repeatedly. The industry-experienced professionals housed in both our East Coast and West Coast offices proudly provide a full spectrum of services, from pure fieldwork/recruitment to the full execution of projects; from survey design to analytical outputs, using qualitative and quantitative research methods.
(See advertisement on p. 50)

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:
B2C Automotive Panel Russia
Size: 140,000
B2C Panel Kazakhstan
Size: 22,000
B2C Panel Baltic States (Lithuania,Latvia,Estonia)
Size: 5,000
B2C Panel Belarus
Size: 50,000
B2C Panel Russia
Size: 600,000
Patient Panel Russia
Size: 450,000
Physician Panel Russia
Size: 95,000
User-Centric Panel
Size: 25,000
B2C Panel Ukraine
Size: 175,000
B2B IT Panel Russia
Size: 10,000

OMI is the only ISO 20252 & 26362 certified online panel provider in Russia. It holds the Gold Certificate for quality and consistency awarded by the U.S.-based online panel auditor Mktg, Inc. Since 2007 the company provides online survey programming, data collection through proprietary B2B and B2C online panels in Russia, Ukraine, Kazakhstan, Belarus and the Baltic states and real-time data visualization. With OMI online panels you can access more than 800,000 consumers, 140,000 vehicle owners, 10,000 IT professionals and 95,000 physicians. OMI also provides an opportunity for mobile research and has over 40,000 participants in its mobile panel in Russia and has more than 25,000 panelists in Internet-behavioral panel, which combines data of the real behavior in the Internet with panel profile data.
(See advertisement on p. 43)

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

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

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
msurdenas@paneldirectonline.com
www.paneldirectonline.com
Meghan Surdenas, Business Development Director
Proprietary Panel Mgmt.: Yes
Panel Titles:
Panel Direct (Focus Forward) Online Panel
Size: 400,000

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

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

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

Public Opinions Inc.
Ottawa, ON
Canada
Ph. 613-695-6370
info@publicopinions.com
www.publicopinions.biz
Panel Titles:
Opinions Publiques-Canadian Consumer Panel(French)
Size: 85,000
Public Opinions-Canadian Consumer Panel (English)
Size: 175,000

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

QuestBack Group, Inc.
Bridgeport, CT
Ph. 203-690-1052
darren.bosick@questback.com
www.questback.com
Proprietary Panel Mgmt.: Yes
Panel Titles:

Quick Test/Heakin
Jupiter, FL
Ph. 561-748-0931 or 800-523-1288
bid@quicktest.com
www.quicktest.com
Heather Hyland,
Proprietary Panel Mgmt.: Yes
Panel Titles:
Quick Test/Heakin Panel

Quick Test, Inc., since 1965, continues to build a database of respondents throughout the US. This is not your typical sample. We are not a virtual company. Our authenticated panel was born from our owned and operated mall facilities. We allow you to access our consumers, business professionals and hard to reach audiences, with our complete set of services. Typical studies for our respondents range from traditional and online methodologies - concept studies, virtual shelves, home use test, sensory evaluation and focus groups. Our sample offers you a new approach to qualitative and quantitative research.

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

Rare Patient Voice, LLC
Towson, MD
Ph. 410-218-0527
wes.michael@rarepatientvoice.com
https://www.rarepatientvoice.com
Panel Titles:
Rare and Orphan Disease Patients and Caregivers
Size: 1,000+
Hemophilia Patients and Caregivers
Size: 1,000

Reckner Healthcare
Chalfont, PA
Ph. 215-822-6220
sphillippe@reckner.com
www.recknerhealthcare.com
Susan Phillippe, Director
Proprietary Panel Mgmt.: Yes
Panel Titles:
MCO/PBM Payer Panel
Size: 100+
Reckner Physicians Panel
Size: 300,000+
Reckner Healthcare Allied Professionals Panel
Size: 200,000+

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 Consumer Panel
ReRez B2B Panel
ReRez Physicians Panel
ReRez Hispanics Panel

ReRez specializes in online panel research (50+ million panelists worldwide) and mixed mode capabilities, including consumer, B2B, and healthcare. 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 quantitative surveys online and by phone with the ability to show visuals via phone interviewing. 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

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

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

Research Now
Plano, TX
Ph. 888-203-6245 or 214-365-5000
info@researchnow.com
www.researchnow.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
e-Rewards Opinion Panel
Valued Opinions Panel

Research Now® has been serving the market research industry with high quality, proprietary, research-only online panels since 2001. We recruit validated, highly sought after individuals to join our By-Invitation-Only® consumer and business panels, and run a multitude of recruitment campaigns with hundreds of diverse online affiliate partners and targeted websites. Our panels can deliver sample representative of the general population and hard-to-reach specialist groups, like B2B decision makers and healthcare professionals. Additionally, our Research Now Mobile™ platform reaches mobile respondents complete with full survey functionality.

Research Panel Asia
Culver City, CA
Ph. 818-742-7025
contact@researchpanelasia.com
www.researchpanelasia.com
Panel Titles:
Survey On - Hong Kong Panel
Size: 5000
91wenwen.com - China Panel
Size: 270000
Survey On - Taiwan Panel
Size: 20000
Research Panel - Japan Panel
Size: 600000
Panelnow.co.kr - South Korea Panel
Size: 100000

Research Panel Asia was founded in 2009 with its HQ in Tokyo, Japan. We also have offices in Seoul, Singapore, Shanghai, Manila and Los Angeles. RPA is a fully-owned subsidiary of Voyage Group, a major online service company, operating one of the biggest online price comparison websites in Japan. We are a full-service provider of high-quality survey panels for the Asian region with over 2 million active panelists offering proprietary coverage in Japan, China, South Korea, as well as countries across Southeast Asia. The firm specializes in providing B2C and B2B studies and provides innovative, 24/7 access to over 200 freshly profiled, premium, online Asian panels.

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

Resolution Research®
Denver, CO
Ph. 303-830-2345
info@re-search.com
www.ResolutionResearch.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
ResolutionPanel.com
Size: 1,000,000+
TheMedicalPanel.com
Size: 500,000
Resolution Research IT/B2B
Resolution Research College
Resolution Research Consumers
Resolution Research Medical

Resonance Insights
Manchester, MA
Ph. 978-740-4474
information@resonanceinsights.com
www.resonanceinsights.com
Panel Titles:
iPhone/iPad Respondents
Resonance Online Household Panel (U.S/Canada)

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

RNB Research
RNB House
Noida 201305 (U.P.)
India
Ph. 91-120-4-246-246
info@rnbresearch.com
www.rnbresearch.com
James Gomes, Project Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
RNB Healthcare Panel
Size: 12,640
RNB HR Decision Makers Panel
Size: 7,612
RNB Youth Panel
Size: 57,682
RNB Consumer Ailment Panel
Size: 9,368
RNB Europe Consumer & B2B
Size: 203,859
RNB South America Consumer & B2B
Size: 112,185
RNB Nurses Panel
Size: 24,235
RNB Research Consumer Panel
Size: 122,608
RMB Small Business Panel
Size: 29,734
RNB IT Decision Makers Panel
Size: 8,947
RNB Asia Pacific Consumer & B2B
Size: 1,135,434
RNB Middle East Consumer & B2B
Size: 245,702
RNB North America Consumer & B2B
Size: 87,188
RNB Research B2B Panel
Size: 59,431
RNB Research Physicians Panel
Size: 36,128
RNB Africa Consumer & B2B
Size: 68,365

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

ROI Rocket's exceptional attention to detail and expansive reach has proved a successful formula recruiting panelists for some of the world's largest brands and companies. Our recruitment solution enables us to provide quality, responsive panelists within hard to reach groups, such as C level executives, ITDMs, doctors, and disease sufferers to ensure low attrition. Whether you are recruiting a large, national research panel or a smaller community, ROI Rocket's team of professionals can help you build, host, and recruit your panel, community, focus group, or clinical trial.

RONIN Corporation
London
United Kingdom
Ph. 44-20-7091-1400
ronin_bid@ronin.com
www.ronin.com/dc
Jess Maddison, Bus. Dev. Manager
Proprietary Panel Mgmt.: Yes
Panel Titles:
RONIN IT International Panel
Size: 250,000
RONIN Healthcare International Panel
Size: 350,000

Sample Czar, Inc.
Los Angeles, CA
Ph. 323-717-8117
info@sampleczar.com
www.sampleczar.com
Douglas Lowell, President
Panel Titles:
Sample Czar Consumer
Sample Czar Business
Sample Czar Patients / Find A Cure Panel
Sample Czar Hispanic

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:
General
Size: 35,000

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

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

As part of the ISA family, SoapBoxSample combines three decades of data collection and research experience with new techniques and technology, offering a fresh solution to online sample fulfillment. Using a blended sample delivery methodology, SoapBoxSample combines panel, real-time sampling and routed sample sources to offer clients greater reach, diversity and flexibility for their research projects. At the core of SoapBoxSample is MySoapBox, a proprietary panel leveraging multi-modal recruiting methodologies, built and managed to provide recruiting for high-touch and specialty engagement studies.

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

SSI
Shelton, CT
Ph. 203-567-7200
info@surveysampling.com
www.surveysampling.com/
Proprietary Panel Mgmt.: Yes
Panel Titles:
Asiktstorget (Sweden)
BlauwNL (Netherlands)
Cafe d'Opinion (Canada)
Centro de Opinion (Spain)
Centro de Opinion (United States)
Centro di Opinione (Italy)
Choozz (Belgium)
Choozz (Netherlands)
Danmarkspanelet (Denmark)
FikirPazari (Turkey)
IT Influencers (United States of America)
MeinungsOrt (Germany)
Meinungswelt (Austria)
Meinungswelt (Germany)
Meinungswelt (Switzerland)
Meningstorget (Norway)
Mielipidemaailma (Finland)
Miles for Thoughts (United States)
Milhas de Opiniões (Brazil)
Mirmnenij (Russia)
mitpanel.dk (Denmark)
Mon Opinion Compte (France)
Mondodiopinione (Italy)
Mondodiopinione (Switzerland)
Mundodeopiniões (Brazil)
Mundodeopiniões (Portugal)
My Voice (South Korea)
Nectar Canvass (United Kingdom)
OpinieLand (Belgium)
OpinieLand (Netherlands)
Opiniolandia (Argentina)
Opiniolandia (Mexico)
Opiniolandia (Spain)
Opinion Miles Club (Australia)
Opinion Miles Club (Japan)
Opinion Miles Club (United States of America)
Opinion Outpost (Canada)
Opinion Outpost (United Kingdom)
Opinion Outpost (United States of America)
Opinion Rewards Club (United States of America)
Opinionsland (Denmark)
OpinionWorld (Australia)
OpinionWorld (Canada)
OpinionWorld (China)
OpinionWorld (Hong Kong)
OpinionWorld (India)
OpinionWorld (Ireland)
OpinionWorld (Japan)
OpinionWorld (Korea, South)
OpinionWorld (New Zealand)
OpinionWorld (Singapore)
OpinionWorld (Taiwan)
OpinionWorld (United Kingdom)
OpinionWorld (United States of America)
PCHonlinesurveys (United States of America)
Placedesopinions (Belgium)
PlacedesOpinions (Canada)
Placedesopinions (France)
Placedesopinions (Switzerland)
Points for Surveys (United States of America)
Pro Opinion (United States of America)
QuickThoughts (Australia)
QuickThoughts (Austria)
QuickThoughts (Belgium)
QuickThoughts (Brazil)
QuickThoughts (Canada)
QuickThoughts (China)
QuickThoughts (Denmark)
QuickThoughts (France)
QuickThoughts (Germany)
QuickThoughts (Japan)
QuickThoughts (New Zealand)
QuickThoughts (Norway)
QuickThoughts (South Korea)
QuickThoughts (Spain)
QuickThoughts (Sweden)
QuickThoughts (Switzerland)
QuickThoughts (The Netherlands)
QuickThoughts (United Kingdom)
QuickThoughts (United States of America)
Research Opinion Poll Panel (United Kingdom)
SurveySpot (United States of America)
Swiatopinii (Poland)
Vakantiepunten:Onderzoekspunten Panel (Netherlands)
webmiles SSI Partner Panel (Austria)
webmiles SSI Partner Panel (Germany)
webmiles SSI Partner Panel (Switzerland)
Your Opinion (Japan)
Your Voice (Australia)
Your Voice (China)
Your Voice (Denmark)
Your Voice (Hong Kong)
Your Voice (India)
Your Voice (Malaysia)
Your Voice (New Zealand)
Your Voice (Norway)
Your Voice (Singapore)
Your Voice (Sweden)
Your Voice (Taiwan)
Your Voice (Thailand)

SSI is the premier global provider of sampling, data collection and data analytic solutions for consumer and business-to-business survey research. SSI reaches respondents across 86 nations through online, landline phone, mobile/wireless and mixed access. With 25 offices spanning every time zone and staff fluent in 42 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. SSI's 3,300 employees serve more than 3,000 clients worldwide. Visit SSI at www.surveysampling.com.
(See advertisement on Insert, Back Cover)

Stackpole & Associates Inc.
Newport, RI
Ph. 617-739-5900 x11
istackpole@stackpoleassociates.com
www.stackpoleassociates.com

Survey.com
San Jose, CA
Ph. 408-850-1227
panos@survey.com
www.survey.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Consumer ePanel
Size: 5,000,000+
Business ePanel
Size: 250,000+
IT Decision Maker ePanel
Size: 50,000+
Global Consumer Panel
Size: 2,000,000+

SurveyHealthCare
New York, NY
Ph. 646-464-1392
larry.schneider@surveyhealthcare.com
www.surveyhealthcare.com
Larry Schneider, Chief Marketing Officer
Panel Titles:
Global Healthcare Panel
Size: 2 million

SurveyHealthCare is a full-service healthcare data collection company with access to over two million health care professionals, sufferers and patients in the US and Canada. SHC specializes 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 for both qualitative and quantitative research projects. 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

Team Vier b.v.
1182 JW Amstelveen
Netherlands
Ph. 31-20-645-53-55
info@teamvier.nl
www.teamvier.nl
Hans Van Gool,
Proprietary Panel Mgmt.: Yes
Panel Titles:
Team Vier CATI Panel
Size: 12,000
Team Vier WAPI Panel
Size: 8,000

Think Virtual Fieldwork
Palm Beach, FL
Ph. 212-699-1901
ray@thinkvirtualfieldwork.com
www.thinkvirtualfieldwork.com
Raymond Benack, President
Proprietary Panel Mgmt.: Yes

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

THRIVE
Atlanta, GA
Ph. 404-228-7342 or 770-310-9532
j.dalton@thrivethinking.com
www.thrivethinking.com
Jonathan Dalton, CEO & Co-Founder

Tiburon Research
Moscow
Russia
Ph. 7-495-661-3233
ask@tiburon-research.ru
www.tiburon-research.ru
Artem Tinchurin, CEO
Panel Titles:
Tiburon Moms with Children 0-14 y.o. Russia
Size: 42,000
Tiburon IT Panel Russia
Size: 4,000
Tiburon Automotive Panel Russia
Size: 90,000
Tiburon B2C Panel Russia
Size: 190,000

Tillion
Panel Marketing Interactive CO., LTD.
Seocho-gu Seoul
South Korea
Ph. 82-2-2055-2524
juyeon@tillion.co.kr
www.tillionpanel.com/index.do
Mi Mi Kim, Project Manager
Panel Titles:
Tillion Panel
Size: 500,000

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 Saudi Arabia
Size: 11,000
6th dimension™ Access Panels United Arab Emirates
Size: 10,000
6th dimension™ Access Panels Hong Kong
Size: 40,000
6th dimension™ Access Panels China
Size: 110,000
6th dimension™ Access Panels Korea
Size: 76,000
6th dimension™ Access Panels Taiwan
Size: 200,000
6th dimension™ Access Panels Thailand
Size: 22,000
6th dimension™ Access Panels Malaysia
Size: 20,000
6th dimension™ Access Panels Australia
Size: 539,000
6th dimension™ Access Panels New Zealand
Size: 132,000
6th dimension™ Access Panels Japan
Size: 50,000
6th dimension™ Access Panels Singapore
Size: 21,000

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:
Teen Panel
Leisure Activities Panel
Moms and Babies Panel
Physicians Panel
Home Improvement Panel
Automotive Panel
Entertainment Panel
B2B/IT Panel
Cosmetic Panel
Finance Panel
Green Consumer Panel
Household Technology Panel
Media Panel
Mobile Panel
Shopping Panel
Sports Panel
Video Gamers Panel
Food and Beverage Panel
Ailment Sufferers Panel

Toluna is a leading digital market research and technology company. A pioneer in the dynamic world of marketing research, data collection, reporting and visualization, Toluna brings together people and brands in the world's largest social voting community of more than 6 million members. As a leading all-in-one global source for actionable insights, we help market researchers, insights professionals and companies anywhere in the world make clearer and better business decisions that drive better business results. Generate valuable consumer insight by a combination of online market research panels and proprietary, industry-leading technology.

Tonic Insight
London
United Kingdom
Ph. 44-207-428-7393
infolondon@tonicinsight.com
www.tonicinsight.com
Steve Phillips, CEO

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

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

uSamp™
Encino, CA
Ph. 818-524-1218 or 877-217-9800
sales@usamp.com
www.usamp.com
Proprietary Panel Mgmt.: Yes
Panel Titles:
Online Panel
Mobile Panel

Through years of extensive profiling and screening, uSamp has built a massive panel of 12 million respondents worldwide, with 12,000 new registrants per day, including mobile. uSamp is equally concerned with panel quality, taking measures to reduce fraudulent responses, panelist duplication, and survey speeding. uSamp leverages technologies like unique identification algorithms, double opt-in registration, and GPS validation to ensure data quality.

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

Vernon Research Group
Cedar Rapids, IA
Ph. 319-364-7278 x7101 or 888-710-7278
mvernon@vernonresearch.com
www.vernonresearch.com
Linda Kuster, Vice President
Proprietary Panel Mgmt.: Yes
Panel Titles:
Vernon Research Opinion Panel
Size: 20,000

Verve Partners Ltd
London
United Kingdom
Ph. 44-203-176-6920
hello@addverve.com
www.addverve.com
Ana Garcia

VERVE – the full service specialist in Community Panels for research – quant, qual, online, offline, on mobile
www.addverve.com
(See advertisement on p. 51)

Video Chat Network
Scarsdale, NY
Ph. 914-722-8385
rgeltman@videochatnetwork.net
www.videochatnetwork.net
Proprietary Panel Mgmt.: Yes
Panel Titles:
Digitally Savvy Panel
Size: 7000

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

WorldOne
New York, NY
Ph. 212-358 0800
info@worldone.com
www.worldone.com
Stephane Malka, VP Global Head Data Services
Panel Titles:
WorldOne's Global Eye Care Panel
Size: 18,434
WorldOne's Global Pharmacists Panel
Size: 77,244
WorldOne's Global Veterinarian Panel
Size: 34,779
WorldOne's Global Nurse Panel
Size: 372,021
WorldOne's Global Dentist Panel
Size: 37,456
WorldOne's Global Physician Panel
Size: 732,497

Sermo WorldOne, leading medical research/social community, provides over 2 decades of expertise in healthcare fieldwork /physician engagement. Sermo WorldOne's services improve healthcare delivery/patient outcomes by enabling its network of 1.8 million healthcare professionals across 80 countries to share their insights and expertise with our clients and each other. Sermo is the largest and most engaged online medical community of verified physicians, with over 270,000 U.S. physician members (40% of the market). We offer Intelligence Solutions, Language Services, and Engagement Solutions.
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YouGov Zapera
København Ø
Denmark
Ph. 45-7027-2224
info@yougov.dk
www.yougov.dk
Proprietary Panel Mgmt.: Yes
Panel Titles:
Dansk Metal (The Danish Metal Workers' Union)
Size: 1,000
AEldresagen (DaneAge Association)
Size: 1,700
Mandag Morgen (Mondag Morning Weekly)
Size: 300
Zapera.com Denmark Panel
Size: 38,000
Zapera.com Norway Panel
Size: 17,000
Zapera.com Finland Panel
Size: 16,000
Zapera.com Estonia Panel
Size: 4,000
Zapera.com Poland Panel
Size: 5,500
Zapera.com Medical Panel Denmark & Sweden
Size: 1,100

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

YouSay!
Las Vegas, NV
Ph. 702-483-4000
Info@YouSayMobile.com
www.YouSayMobile.com

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(See advertisement on pp. 52-53)

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

African-American

Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 80
Census Balanced Omnibus Panel, Amplitude Research, Inc. p. 80
ClickIQ Consumer Panel, ClickIQ p. 81
Consumer Directions, KL Communications, Inc. p. 84
CRS Consumer ePanel, City Research Solutions p. 81
Custom/Proprietary Panels and Community Panels, Signet Research, Inc. p. 88
Datatelligence Online, CRG Global, Inc. p. 82
Datatelligence Online, CSS/datatelligence p. 82
Datatelligence Online, Datatelligence Online p. 82
E-Poll Consumer Panel, E-Poll Market Research p. 82
e-Rewards Opinion Panel, Research Now p. 87
Esearch Children/Teens Panel, Esearch.com, Inc. p. 82
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 82
Focus World B-2-B Medical Panels, Focus World International, Inc. p. 82
Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 82
Focus World Ethnic Panel, Focus World International, Inc. p. 82
General, Shifrin-Hayworth p. 88
Harris Poll Online, Harris Interactive Inc. p. 83
Itracks Canada Talk Now, itracks p. 83
Itracks USA Talk Now, itracks p. 83
Know More™ Internet Panel, Radius Global Market Research p. 86
KnowledgePanel®, GfK p. 83
Lightspeed Automotive Specialty Panel, Lightspeed GMI p. 84
Lightspeed B2B ELITEOpinion Specialty Panel, Lightspeed GMI p. 84
Lightspeed Beauty & Personal Care Specialty Panel, Lightspeed GMI p. 84
Lightspeed Beverages Specialty Panel, Lightspeed GMI p. 84
Lightspeed Consumer Panel, Lightspeed GMI p. 84
Lightspeed Family & Household Specialty Panel, Lightspeed GMI p. 84
Lightspeed Finance Specialty Panel, Lightspeed GMI p. 84
Lightspeed Health and Wellness Specialty Panel, Lightspeed GMI p. 84
Lightspeed Media Consumption Specialty Panel, Lightspeed GMI p. 84
Lightspeed Mobile Phone Specialty Panel, Lightspeed GMI p. 84
Lightspeed Sports and Hobbies Specialty Panel, Lightspeed GMI p. 84
Lightspeed Travel and Leisure Specialty Panel, Lightspeed GMI p. 84
Market Research Online Community, Mars Research p. 84
Mars General Consumer Panel, Mars Research p. 84
MindField General Consumer Panel, MindField Online Internet Panels p. 85
MindField Health Ailment & Condition, MindField Online Internet Panels p. 85
MindField Health and Beauty Aids Brand Panel, MindField Online Internet Panels p. 85
MindField Pet Owner Panel, MindField Online Internet Panels p. 85
MindField Travel and Leisure Panel, MindField Online Internet Panels p. 85
MindField Vision Care Panel, MindField Online Internet Panels p. 85
Mobile Panel, uSamp™ p. 90
My View, Critical Mix p. 82
MyPoints Consumer Panel, MyPoints.com, Inc. p. 85
MySoapBox, SoapBoxSample p. 88
One Opinion, Critical Mix p. 82
Online Global B2B, EMI - Research Solutions p. 82
Online Global B2C, EMI - Research Solutions p. 82
Online Global Healthcare, EMI - Research Solutions p. 82
Online Panel, uSamp™ p. 90
Panel Direct (Focus Forward) Online Panel, Panel Direct p. 86
Panelspeak Business and Consumer Panel, Amplitude Research, Inc. p. 80
People Panel - Consumer Panel, The, The People Panel p. 86
Quick Test/Heakin Panel, Quick Test/Heakin p. 86
ReRez Consumer Panel, ReRez p. 87
ResolutionPanel.com, Resolution Research® p. 87
ROI Rocket, ROI Rocket p. 88
SurveySavvy, Luth Research p. 84
SurveySpot (United States of America), SSI p. 88
US/Intl. Consumer, B2B, Healthcare, & Technology, CATALYSTMR p. 81
Valued Opinions Panel, Research Now p. 87
VO!CE of the Region, Campos Market Research, Inc. p. 81
YouGov PollingPoint, YouGovPolimetrix p. 90
Zoom Panel, Critical Mix p. 82

Air Travelers

Consumer Panel, mo'web GmbH p. 85
Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 82
General, Shifrin-Hayworth p. 88
Lightspeed Automotive Specialty Panel, Lightspeed GMI p. 84
Lightspeed B2B ELITEOpinion Specialty Panel, Lightspeed GMI p. 84
Lightspeed Beauty & Personal Care Specialty Panel, Lightspeed GMI p. 84
Lightspeed Beverages Specialty Panel, Lightspeed GMI p. 84
Lightspeed Consumer Panel, Lightspeed GMI p. 84
Lightspeed Family & Household Specialty Panel, Lightspeed GMI p. 84
Lightspeed Finance Specialty Panel, Lightspeed GMI p. 84
Lightspeed Health and Wellness Specialty Panel, Lightspeed GMI p. 84
Lightspeed Media Consumption Specialty Panel, Lightspeed GMI p. 84
Lightspeed Mobile Phone Specialty Panel, Lightspeed GMI p. 84
Lightspeed Sports and Hobbies Specialty Panel, Lightspeed GMI p. 84
Lightspeed Travel and Leisure Specialty Panel, Lightspeed GMI p. 84
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My View, Critical Mix p. 82
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Online Global B2C, EMI - Research Solutions p. 82
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ROI Rocket, ROI Rocket p. 88
SurveySavvy, Luth Research p. 84
YouGov PollingPoint, YouGovPolimetrix p. 90
Zoom Panel, Critical Mix p. 82

Asians

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Borders Japan Panel, Borders, Inc. p. 80
Census Balanced Omnibus Panel, Amplitude Research, Inc. p. 80
ClickIQ Consumer Panel, ClickIQ p. 81
Consumer Directions, KL Communications, Inc. p. 84
CRC Consumer and B2B, CRC Research p. 82
Custom/Proprietary Panels and Community Panels, Signet Research, Inc. p. 88
Datatelligence Online, CRG Global, Inc. p. 82
Datatelligence Online, CSS/datatelligence p. 82
Datatelligence Online, Datatelligence Online p. 82
Embrain Panel, Macromillembrain p. 84
E-Poll Consumer Panel, E-Poll Market Research p. 82
e-Rewards Opinion Panel, Research Now p. 87
Esearch Children/Teens Panel, Esearch.com, Inc. p. 82
Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 82
Ethnic Voice Accord (EVA), Cido Research p. 81
Focus World B-2-B Medical Panels, Focus World International, Inc. p. 82
Focus World Consumers Nationwide Panel, Focus World International, Inc. p. 82
G.L.A. Japanese House Hold Photo Reporting Panel, G.L.A. Intercultural Marketing and Communication p. 82
General, Shifrin-Hayworth p. 88
Harris Poll Online, Harris Interactive Inc. p. 83
Interface Asia Consumer, InterfaceAsia p. 83
InterfaceAsia B2B / IT, InterfaceAsia p. 83
InterfaceAsia Medical (Physician), InterfaceAsia p. 83
Itracks Canada Talk Now, itracks p. 83
Itracks USA Talk Now, itracks p. 83
Know More™ Internet Panel, Radius Global Market Research p. 86
Lightspeed Automotive Specialty Panel, Lightspeed GMI p. 84
Lightspeed B2B ELITEOpinion Specialty Panel, Lightspeed GMI p. 84
Lightspeed Beauty & Personal Care Specialty Panel, Lightspeed GMI p. 84
Lightspeed Beverages Specialty Panel, Lightspeed GMI p. 84
Lightspeed Consumer Panel, Lightspeed GMI p. 84
Lightspeed Family & Household Specialty Panel, Lightspeed GMI p. 84
Lightspeed Finance Specialty Panel, Lightspeed GMI p. 84
Lightspeed Health and Wellness Specialty Panel, Lightspeed GMI p. 84
Lightspeed Media Consumption Specialty Panel, Lightspeed GMI p. 84
Lightspeed Mobile Phone Specialty Panel, Lightspeed GMI p. 84
Lightspeed Sports and Hobbies Specialty Panel, Lightspeed GMI p. 84
Lightspeed Travel and Leisure Specialty Panel, Lightspeed GMI p. 84
MindField General Consumer Panel, MindField Online Internet Panels p. 85
MindField Health Ailment & Condition, MindField Online Internet Panels p. 85
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References to technologies and formulations often run the risk of being perceived as jargon, which is to be avoided in most countries.

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Diagnosing the patient's ability to pay is an important part of medical practice in rural and emerging markets.

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Make your members famous in your community by featuring quotations from their communications and their contributions.

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I cannot think of two other industries that seem to be engaged in the same work but getting to such different/more defined objectives.

Quirk's 2015 Editorial Calendar

At Quirk's, we welcome submissions from outside sources but editorial space is limited. Interested in submitting an article? Review our 2015 editorial calendar and query early! Contact Quirk's Editor Joe Rydholm (joe@quirks.com) for more information.

January What's Ahead in 2015 Frontiers in Data-Gathering (biometric, virtual reality, eye-tracking, neuro MR, etc.)	**July** Raising MR's Profile in Your Organization Mobile Research – Qualitative/Ethnography Shopper Insights
February Mobile Research – Quantitative Millennials/Youth Research & Insights Research Software & Solutions Directory	**August** New Product/Innovation Research Regional Focus: Latin America
March Advertising Research Pharmaceutical Industry Research	**September** Research Sourcebook Directory Corporate Research Report Supplement No Regular Editorial
April Business-to-Business Research Regional Focus: China	**October** Customer Experience Research Health Care Research
May Data Integration, Analysis & Visualization Qualitative Research Focus Group Moderators Directory	**November** Global Research Research Panels and Communities
June Internet/Online Research Research Technology Report	**December** Qualitative Research Regional Focus: Asia (excluding China) Focus Group Facilities Directory

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••• health care research

What can we learn from analyzing the differences between what doctors say and patients hear in office visits?

••• research communities

A case study with uninsured consumers shopping for health insurance shows how MROCs can be used to explore consumer purchase processes..

••• ad research

An examination of award-winning advertising campaigns led to the creation of the A-B-4C model, which consists of six elements that make up the core of these iconic ad efforts.

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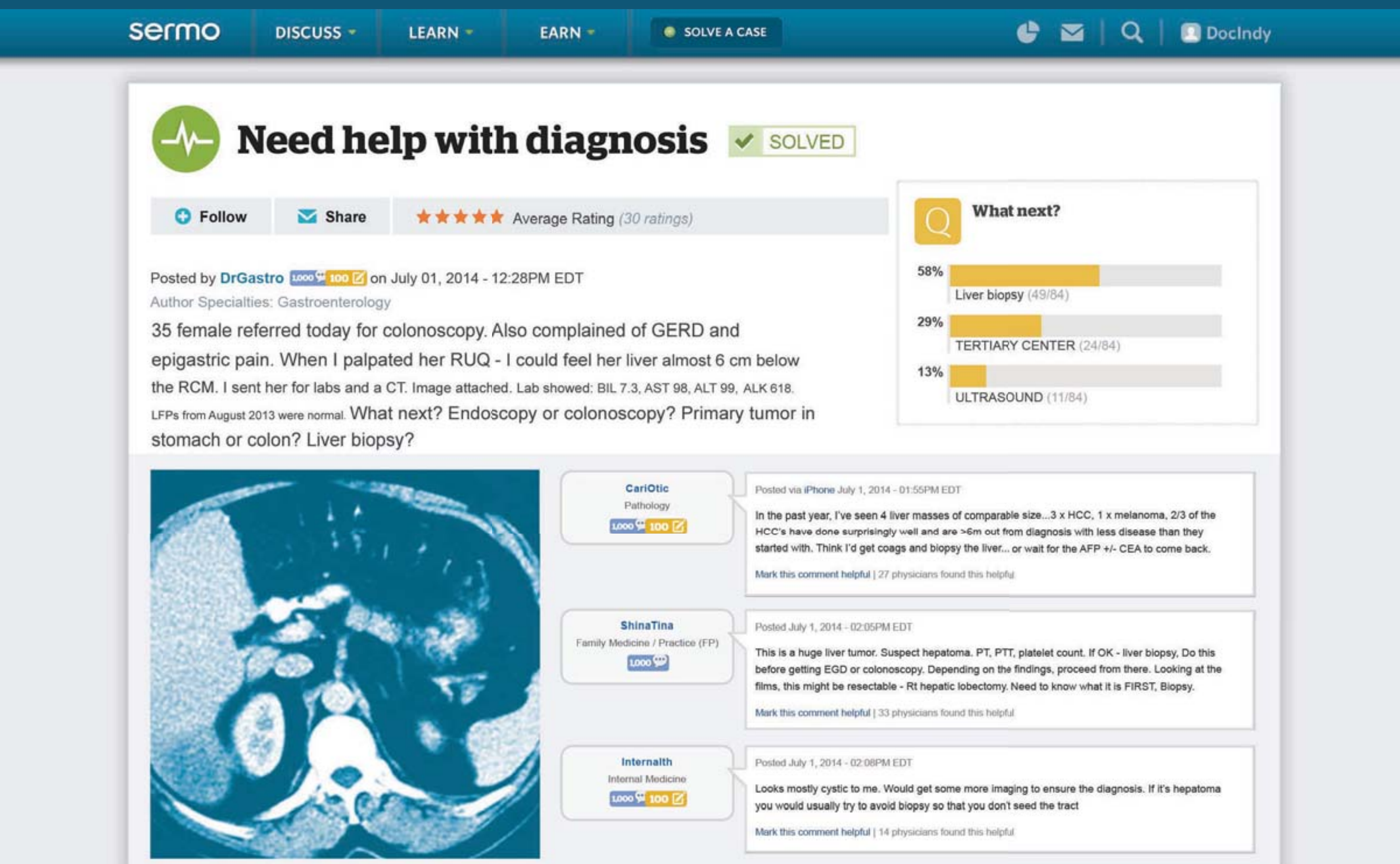

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