2008 HONOMICHL

BUSINESS REPORT OF THE U.S. MARKETING RESEARCH INDUSTRY

TOP 50
ECONOMY STUNTS INDUSTRY GROWTH

BY JACK HONOMICHL

GIVEN A SAGGING economy and an inflation rate that is inching up, it should be no surprise that spending for marketing/advertising/public opinion research services within the United States, while up slightly, was down significantly from the growth rate enjoyed in 2006.

Specifically, this analysis—based on input from 200 research firms based in the United States—showed total revenue of $8.6 billion in 2007, up 6.0% over 2006. However, after adjustment for inflation, which ran at 4.1% in 2007, the so-called real growth was 1.9% (see chart). The comparable number for 2006 was 4.1%. If we look at the most recent 10 years (1997-2006), the annual spending growth rate after adjustment for inflation averaged 3.5% per year. The 2007 rate of 1.9% is, obviously, well below that, and the lowest we’ve seen since the slumping economy of 2001 to 2002.

This is the main finding from this, my 35th annual analysis of industry growth, prepared exclusively for Marketing News.

Solid Base

The base for this analysis and trend data is large—200 research firms based in the United States that have reported their revenue (U.S. only) for calendar year 2007. The main input comes from the 50 largest U.S. research firms’ revenue; they alone account for 91% of the revenue under study. Fortunately, many of the largest Top 50 firms are public, or are subsidiaries of public companies, so their financials are verifiable. The other Top 50 firms provide third-party verification of their revenue. Since several of the Top 50 firms made acquisitions during 2007, every effort has been made to eliminate artificial growth due to acquisition, either by including or excluding acquired revenue when calculating growth.

The balance, 9% of revenue, is attributable to 150 Council of American Survey Research Organizations (CASRO) firms that are not included in the Top 50 (or a couple that choose not to participate). On average, these 150 firms had revenue of $5.2 million in 2007. As a group, their revenue grew by 6.2% in 2007 compared with 6.0% for the Top 50, and almost all of this was within the United States.

It should be noted that as hefty as our database is ($8.6 billion), it is not the total amount spent on research services in the United States. For one, federal government agencies spend about $5 billion a year for statistical programs (mostly survey research), and only two of the Top 50 firms (Westat Inc. and Opinion Research Corp.) get a sizable piece of that revenue. Then there are nonprofit survey organizations affiliated with universities that are not included, and commercial research that is done in-house.

But when it comes to commercial marketing research through for-profit firms, this analysis is well-based as the lion’s share.

Changes In Listing

Every year there is change in the list composition. Some firms are acquired or revenue drops enough to miss the Top 50 cutoff. And these openings bring new firms to light, some for the first time. In 2007, there were five additions: Hitwise, Compete Inc., Q Research Solutions Inc., Gongos Research Inc. and The Link Group. Four firms lost their own line ranking due to acquisition: Guideline Inc., No. 38 on the 2006 list, was acquired by a newly formed Opinion Research/Guideline Group. No. 15 on this year’s list; Flake-Wilkerson Market Insights LLC, No. 37 on the 2006 list, was acquired by Market Strategies Inc., No. 17 on this year’s list; Schulman, Ronca & Bucuvalas Inc., No. 41 on the 2006 list, was acquired by Abt Associates Inc., No. 19 on this year’s list; and Telephia Inc., No. 16 on the 2006 list, was acquired by The Nielsen Co., No. 1 on this year’s list. Finally, Experian Research Services (namely, Simmons Market Research Bureau), No. 30 on the 2006 list, dropped off the list in 2007.

Of special note regarding list turnover is the growth of startups, many in recent years rooted in online data collection. They demonstrate how the U.S. research industry revitalizes itself via innovation and “ease of entry, ” as the economists term it, especially in a financial climate where so many startups have found it relatively easy to raise capital from outside investors. Then, when a newer firm grows to an appetizing size, it usually goes public or is acquired by a larger, well-established research conglomerate. So the industry evolves, picks up energy and adapts to technological changes.

Growth Rates

The sluggish growth rate in 2007 calls for further examination. If you look at the Top 50 firms, 21 saw revenue decrease in 2007 vis-à-vis 2006, or did not grow enough to cover the 4.1% inflation rate. Of the very large firms, the one with the most impressive revenue growth was Westat, with 10.4%. Of the bottom half, with rankings of No. 26 through No. 50, 12 saw revenue decline. So those firms with revenue of $34 million or less really took a hit in 2007. One reason for this is that, with rare exceptions, the smaller firms specialize in ad hoc survey research—and such spending is easily curtailed during hard times. Conversely, the huge conglomerates, with rare exception, get the lion’s share of their revenue from syndicated services rooted in huge databases, most of which are under contract. And this business tends to weather economic slowdowns well.

With the exception of Westat, all of the top 10 firms on this year’s Top 50 list are either publicly listed companies, subsidiaries of larger public companies or—in the case of Nielsen—a private company that makes some of their financials public. Six are foreign-owned if you include Nielsen, which has both Dutch and U.S. home bases. All are global in reach, except for Westat, which does not do work outside the United States.

Non-U.S. Revenue

The emphasis of this annual analysis is to track U.S. spending, but it should be noted that 33 of the Top 50 organizations have revenue from work done outside the United States, and that information is in the table on page H4. It is best understood by a firm-by-firm analysis, because in many cases the U.S. Top 50 firm is a subsidiary of worldwide conglomerates based in the United Kingdom, Germany, France and other faraway places—so much for the globalization of the marketing research industry.

To really get a grip on this phenomenon, I suggest you read the individual company profiles that follow. In addition to describing the services these firms offer, the profiles also spell out the ownership of U.S.-based research operations and why so many of U.S. dollars spent for research services end up as profits expressed in euros, pounds and other currencies. And this is a mixed blessing; to the degree that European research conglomerates have expanded in the United States (usually via acquisitions), they are currently hurt profit-wise by weak U.S. dollars, which buys fewer and fewer euros or pounds in profits when converted.

<table>
<thead>
<tr>
<th>Year</th>
<th>Base No. of Research Firms</th>
<th>% Revenue Growth-Year to-Year</th>
<th>“Real Growth” (after adjustment for inflation)</th>
</tr>
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<td>1988</td>
<td>140</td>
<td>7.8%</td>
<td>3.7%</td>
</tr>
<tr>
<td>1989</td>
<td>147</td>
<td>4.8%</td>
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<tr>
<td>1990</td>
<td>152</td>
<td>8.9%</td>
<td>3.5</td>
</tr>
<tr>
<td>1991</td>
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<td>7.6%</td>
<td>3.4</td>
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<td>1992</td>
<td>156</td>
<td>10.6%</td>
<td>7.6</td>
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<td>1993</td>
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<td>9.3%</td>
<td>6.3</td>
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<td>1994</td>
<td>157</td>
<td>9.5%</td>
<td>6.9</td>
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<tr>
<td>1995</td>
<td>162</td>
<td>9.2%</td>
<td>6.4</td>
</tr>
<tr>
<td>1996</td>
<td>169</td>
<td>5.7%</td>
<td>2.7</td>
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<td>1997</td>
<td>174</td>
<td>12.6%</td>
<td>10.3</td>
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<td>1998</td>
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<td>11.6%</td>
<td>10.0</td>
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<td>1999</td>
<td>174</td>
<td>10.1%</td>
<td>7.9</td>
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<tr>
<td>2000</td>
<td>181</td>
<td>9.0%</td>
<td>5.6</td>
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<td>2001</td>
<td>180</td>
<td>4.0%</td>
<td>1.2</td>
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<td>2002</td>
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<td>3.5%</td>
<td>1.9</td>
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<td>2003</td>
<td>197</td>
<td>5.6%</td>
<td>3.3</td>
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<tr>
<td>2004</td>
<td>188</td>
<td>9.9%</td>
<td>7.2</td>
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<tr>
<td>2005</td>
<td>193</td>
<td>5.5%</td>
<td>2.1</td>
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<td>2006</td>
<td>207</td>
<td>6.6%</td>
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</tr>
<tr>
<td>2007</td>
<td>200</td>
<td>6.0%</td>
<td>1.9</td>
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## Top 50 U.S. Market Research Firms

<table>
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<tr>
<th></th>
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<th></th>
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<tbody>
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<td>1</td>
<td>The Nielsen Co.</td>
<td>New York</td>
<td>nielson.com</td>
<td>$2,173.0</td>
<td>7.9%</td>
<td>$4,220.0</td>
<td>$2,047.0</td>
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<td>2</td>
<td>IMS Health Inc.</td>
<td>Norwalk, Conn.</td>
<td>imshealth.com</td>
<td>801.0</td>
<td>8.6%</td>
<td>2,192.6</td>
<td>1,391.6</td>
<td>65.1%</td>
<td>2,034</td>
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<td>3</td>
<td>Kantar Group*</td>
<td>Fairfield, Conn.</td>
<td>kantarcom.com</td>
<td>526.8</td>
<td>3.5%</td>
<td>1,551.4</td>
<td>1,024.6</td>
<td>66.0%</td>
<td>2,600</td>
</tr>
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<td>4</td>
<td>Westat Inc.</td>
<td>Rockville, Md.</td>
<td>westat.com</td>
<td>467.8</td>
<td>10.4%</td>
<td>467.8</td>
<td>—</td>
<td>—</td>
<td>1,935</td>
</tr>
<tr>
<td>5</td>
<td>IRI</td>
<td>Chicago</td>
<td>infor.com</td>
<td>441.0</td>
<td>2.1%</td>
<td>702.0</td>
<td>261.0</td>
<td>37.2%</td>
<td>1,464</td>
</tr>
<tr>
<td>6</td>
<td>TNS U.S.</td>
<td>New York</td>
<td>tnsglobal.com</td>
<td>379.8</td>
<td>2.8%</td>
<td>2,372.2</td>
<td>1,757.4</td>
<td>82.2%</td>
<td>2,000</td>
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<tr>
<td>7</td>
<td>Arbitron Inc.</td>
<td>New York</td>
<td>arbitron.com</td>
<td>338.5</td>
<td>6.0%</td>
<td>352.1</td>
<td>13.6</td>
<td>3.9</td>
<td>1,092</td>
</tr>
<tr>
<td>8</td>
<td>GfK AG USA</td>
<td>Nuremberg, Germany</td>
<td>gfk.com</td>
<td>379.7</td>
<td>1.3%</td>
<td>1,603.3</td>
<td>1,283.3</td>
<td>80.1%</td>
<td>1,039</td>
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<tr>
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<td>Ipsos</td>
<td>New York</td>
<td>Ipsos-na.com</td>
<td>281.2</td>
<td>3.5%</td>
<td>1,270.3</td>
<td>989.1</td>
<td>77.9%</td>
<td>800</td>
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<td>Synovate</td>
<td>London</td>
<td>synovate.com</td>
<td>250.4</td>
<td>6.9%</td>
<td>867.0</td>
<td>616.6</td>
<td>71.1%</td>
<td>832</td>
</tr>
<tr>
<td>11</td>
<td>Maritz Research</td>
<td>Fenton, Mo.</td>
<td>maritzresearch.com</td>
<td>187.4</td>
<td>5.2%</td>
<td>223.3</td>
<td>35.9</td>
<td>16.1%</td>
<td>632</td>
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<td>12</td>
<td>J.D. Power and Associates*</td>
<td>Westlake Village, Calif.</td>
<td>jdpower.com</td>
<td>184.5</td>
<td>8.2%</td>
<td>260.5</td>
<td>76.0</td>
<td>29.2%</td>
<td>620</td>
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<td>Harris Interactive Inc.</td>
<td>Rochester, N.Y.</td>
<td>harrisinteractive.com</td>
<td>161.0</td>
<td>-3.6%</td>
<td>227.0</td>
<td>66.0</td>
<td>29.1%</td>
<td>879</td>
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<td>14</td>
<td>The NPD Group Inc.</td>
<td>Port Washington, N.Y.</td>
<td>npdcom.com</td>
<td>160.4</td>
<td>10.1%</td>
<td>211.0</td>
<td>50.7</td>
<td>24.0%</td>
<td>860</td>
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<tr>
<td>15</td>
<td>Opinion Research/Guideline Group</td>
<td>Omaha, Neb.</td>
<td>infousa.com</td>
<td>124.7</td>
<td>4.5%</td>
<td>206.7</td>
<td>82.0</td>
<td>39.7%</td>
<td>546</td>
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<tr>
<td>16</td>
<td>Opinion Research Corp.</td>
<td>Princeton, N.J.</td>
<td>opinionresearch.com</td>
<td>97.5</td>
<td>0.7%</td>
<td>179.5</td>
<td>82.0</td>
<td>45.7%</td>
<td>458</td>
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<td>17</td>
<td>Guideline Inc.</td>
<td>New York</td>
<td>guideline.com</td>
<td>26.8</td>
<td>21.3%</td>
<td>26.8</td>
<td>—</td>
<td>—</td>
<td>73</td>
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<td>18</td>
<td>comScore Inc.</td>
<td>Reston, Va.</td>
<td>comscore.com</td>
<td>77.0</td>
<td>26.0%</td>
<td>87.2</td>
<td>10.2</td>
<td>11.7%</td>
<td>370</td>
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<td>19</td>
<td>Market Strategies Inc.</td>
<td>Livonia, Mich.</td>
<td>marketstrategies.com</td>
<td>75.7</td>
<td>6.3%</td>
<td>80.4</td>
<td>4.7</td>
<td>5.8%</td>
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<td>53.4</td>
<td>11.0%</td>
<td>58.7</td>
<td>4.7</td>
<td>8.1%</td>
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<td>21</td>
<td>Flask-Wilkerson Market Insights</td>
<td>Little Rock, Ark.</td>
<td>fwi.com</td>
<td>22.3</td>
<td>-3.5%</td>
<td>22.3</td>
<td>—</td>
<td>—</td>
<td>75</td>
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<td>22</td>
<td>Lieberman Research Worldwide</td>
<td>Los Angeles</td>
<td>lieonline.com</td>
<td>71.0</td>
<td>12.5%</td>
<td>87.4</td>
<td>16.4</td>
<td>18.8%</td>
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<td>Abt Associates Inc.</td>
<td>Cambridge, Mass.</td>
<td>abtassociates.com</td>
<td>55.1</td>
<td>-16.8%</td>
<td>55.1</td>
<td>—</td>
<td>—</td>
<td>279</td>
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<td>24</td>
<td>Abt Associates Inc.</td>
<td>Cambridge, Mass.</td>
<td>abtassociates.com</td>
<td>55.1</td>
<td>-16.8%</td>
<td>55.1</td>
<td>—</td>
<td>—</td>
<td>279</td>
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<td>25</td>
<td>Abt SRBI Inc.</td>
<td>New York</td>
<td>srbi.com</td>
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<td>6.8%</td>
<td>22.1</td>
<td>—</td>
<td>—</td>
<td>129</td>
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<td>OTX</td>
<td>Los Angeles</td>
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<td>32.6%</td>
<td>54.5</td>
<td>3.7</td>
<td>6.8%</td>
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<td>Burke Inc.</td>
<td>Cincinnati</td>
<td>burke.com</td>
<td>47.0</td>
<td>8.0%</td>
<td>53.1</td>
<td>6.1</td>
<td>11.5%</td>
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<td>Jupiter, Fla.</td>
<td>mlvgroup.com</td>
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<td>1.6%</td>
<td>42.3</td>
<td>—</td>
<td>—</td>
<td>193</td>
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<td>Knowledge Networks Inc.</td>
<td>Merlo Park, Calif.</td>
<td>knowledgenetworks.com</td>
<td>37.7</td>
<td>5.7%</td>
<td>37.7</td>
<td>—</td>
<td>—</td>
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<td>National Research Corp.</td>
<td>Lincoln, Neb.</td>
<td>nationalresearch.com</td>
<td>37.2</td>
<td>1.9%</td>
<td>41.2</td>
<td>4.0</td>
<td>9.7%</td>
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<td>Cincinnati</td>
<td>directionsresearch.com</td>
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<td>1.4%</td>
<td>37.2</td>
<td>—</td>
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<td>Phoenix Marketing International</td>
<td>Phoenix, N.Y.</td>
<td>phoenixmi.com</td>
<td>33.5</td>
<td>26.5%</td>
<td>34.9</td>
<td>1.4</td>
<td>4.0%</td>
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<td>Lieberman Research Group</td>
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<td>liebermanresearch.com</td>
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<td>28.1%</td>
<td>30.1</td>
<td>—</td>
<td>—</td>
<td>76</td>
</tr>
<tr>
<td>34</td>
<td>ICR/INTL Communications Research</td>
<td>Media, Pa.</td>
<td>icrsurvey.com</td>
<td>28.8</td>
<td>-6.5%</td>
<td>29.7</td>
<td>0.9</td>
<td>1.0%</td>
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<td>Morpace Inc.</td>
<td>Farmington Hills, Mich.</td>
<td>morpace.com</td>
<td>28.7</td>
<td>-4.7%</td>
<td>33.2</td>
<td>4.5</td>
<td>13.6%</td>
<td>150</td>
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<td>36</td>
<td>MarketCast</td>
<td>Los Angeles</td>
<td>marketcastonline.com</td>
<td>25.1</td>
<td>2.0%</td>
<td>25.1</td>
<td>—</td>
<td>—</td>
<td>36</td>
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<tr>
<td>37</td>
<td>Data Development Worldwide</td>
<td>New York</td>
<td>datadw.com</td>
<td>25.0</td>
<td>6.8%</td>
<td>25.3</td>
<td>0.3</td>
<td>1.2%</td>
<td>80</td>
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<td>CAR Research Services Inc.</td>
<td>Chicago</td>
<td>carresearch.com</td>
<td>23.6</td>
<td>9.8%</td>
<td>23.6</td>
<td>—</td>
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<td>Informa Research Services Inc.</td>
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<td>informars.com</td>
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<td>-6.7%</td>
<td>23.5</td>
<td>—</td>
<td>—</td>
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<td>Philadelphia</td>
<td>nationalanalysts.com</td>
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<td>-12.1%</td>
<td>23.3</td>
<td>—</td>
<td>—</td>
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<td>Kansas City, Mo.</td>
<td>servicemanagement.com</td>
<td>22.4</td>
<td>22.4%</td>
<td>23.0</td>
<td>0.6</td>
<td>2.6%</td>
<td>134</td>
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<td>Market Probe Inc.</td>
<td>Milwaukee</td>
<td>marketprobe.com</td>
<td>21.7</td>
<td>-3.6%</td>
<td>41.4</td>
<td>19.7</td>
<td>47.6%</td>
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<td>43</td>
<td>Hitwise</td>
<td>New York</td>
<td>hitwise.com</td>
<td>21.6</td>
<td>50.0%</td>
<td>49.9</td>
<td>28.3</td>
<td>56.7%</td>
<td>75</td>
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<tr>
<td>44</td>
<td>Walker Information</td>
<td>Indianapolis</td>
<td>walkerinfo.com</td>
<td>21.2</td>
<td>10.4%</td>
<td>25.5</td>
<td>4.3</td>
<td>16.9%</td>
<td>180</td>
</tr>
<tr>
<td>45</td>
<td>KS&amp;R Inc.</td>
<td>Syracuse, N.Y.</td>
<td>ksrinc.com</td>
<td>171</td>
<td>-9.5%</td>
<td>21.0</td>
<td>3.9</td>
<td>18.6%</td>
<td>198</td>
</tr>
<tr>
<td>46</td>
<td>Bellomy Research Inc.</td>
<td>Winston-Salem, N.C.</td>
<td>bellomyresearch.com</td>
<td>16.7</td>
<td>14.4%</td>
<td>16.7</td>
<td>—</td>
<td>—</td>
<td>95</td>
</tr>
<tr>
<td>47</td>
<td>MarketVision Research Inc.</td>
<td>Cincinnati</td>
<td>marketvisionresearch.com</td>
<td>16.4</td>
<td>10.1%</td>
<td>16.4</td>
<td>—</td>
<td>—</td>
<td>80</td>
</tr>
<tr>
<td>48</td>
<td>Public Opinion Strategies</td>
<td>Alexandria, Va.</td>
<td>pos.org</td>
<td>15.5</td>
<td>-48.5%</td>
<td>15.5</td>
<td>—</td>
<td>—</td>
<td>33</td>
</tr>
<tr>
<td>49</td>
<td>Compete Inc.</td>
<td>Boston</td>
<td>compete.com</td>
<td>14.9</td>
<td>53.6%</td>
<td>14.9</td>
<td>—</td>
<td>—</td>
<td>100</td>
</tr>
<tr>
<td>50</td>
<td>Savitz Research Companies</td>
<td>Dallas</td>
<td>savitzresearch.com</td>
<td>14.8</td>
<td>-2.6%</td>
<td>14.8</td>
<td>—</td>
<td>—</td>
<td>50</td>
</tr>
</tbody>
</table>

*Estimated by Top 50 U.S. and worldwide revenue may include nonresearch activities for some companies that are significantly higher. See individual company profiles for details. 1Rate of growth from year to year has been adjusted so as not to include revenue gains or losses from acquisitions or divestitures. See company profiles for explanation. 2Total revenue of 150 survey research companies that provide financial information on a confidential basis to the Council of American Survey Research Organizations (CASRO).
ACNielsen
ACNielsen serves consumer product manufactur-
eries, retailers and sales agencies with mass research,
products and services, and analytical tools.
In its core business areas serve brand, category,
sales management and strategic planning.
- Retail Market Research provides continu-
ous tracking of product sales to consumers, based
on information gathered at the retail point-of-sale. BSS
information is available in more than 80 countries.
- Consumer Panel Services research tracks the
purchasing behavior of consumers in more than
90,000 households in 28 countries worldwide, pri-
marily through the use of in-home scanners.
- Assortment and In-Store Space Services provide
help in making decisions on issues such as shelf in-
venories, shelf space, category growth opportunities,
product listings and how best to distribute merchan-
dise information.
- Customized Research provides qualitative
and quantitative measures of consumers’ attitudes
and purchasing behavior, customer satisfaction, brand
awareness and equity, advertising effectiveness and
other marketing issues.
- Retail Services are used to evaluate competitive
performance, increase traffic and sales, leverage their
frequent shopper data and build consumer loyalty,
improving performance of their private label products
and understand their results across all product classes
and categories they carry.
- Analytic Consulting Services addresses such
business issues as pricing, promotion, marketing mix,
asessment and product rationalization, category
placement, category management and in-store, in-market
auditing and pricing.
- Nielsen Support Services provide software
tools and delivery methods with tools that range from
analytical and data management systems to standard
reports that are automatically refreshed when data
base are updated.
- Global Services coordinates with local
ACNielsen offices throughout the world to deliver
clear, consistent intelligence across markets.
- Nielsen, a division of ACNielsen, provides universal
coverage and unique codes for stores, outlets and
accounts, as well as Trade Dimensions directories.
Major 2007 highlights for ACNielsen U.S. include
the launch of Total Shopper View, a panel central to
capture non-bar-coded items; the launch of Brand³,
an approach to targeting in-home scanner usage data,
household panel information and customized survey
research to manage brand performance and growth,
the addition of new capabilities and features to Nielsen
Assessment Web-based information delivery platform,
and the expansion of its Hispanic Consumer Panel to
the national level with 2,500 households.

Nielsen Media Research
Nielsen Media Research (www.nielsenmedia.com)
provides TV audience measurement information
for broadcast and cable networks and stations executives,
cable system and satellite service providers, program
producers and distributors, and advertisers and their
agencies. In the United States, Nielsen TV ratings are
the currency for more than $70 billion of transactions
each year between buyers and sellers of TV time.
NMR markets a range of information products:
- Nielsen Monitor-Plus provides advertising
spending activity for 18 media, including TV, radio,
magazines, newspaper and outdoor.
- Nielsen Product Placement Services tracks product
placements on prime-time entertainment programming
for the English-language broadcast networks and five
top cable networks.
- Nielsen Sports provides research that
measures out-of-home audience view, advertising
impact and demographics for TV and digital signage
networks.
- Nielsen Media Research International provides
media measurement and advertising intelligence in
55 markets. With the ACGB Group, NMR operates a joint
venture that offers TV ratings in 30 countries, under
the AGB Nielsen Media Research Brand.
NMR provides radio audience measurement ser-
VICES in nine markets, and print readership services
in 10 markets.
Nielsen Marketing Insights and Panorama
Nielsen Marketing Insights and Panorama surveys
study print, TV, radio, cinema, outdoor and
internet audiences, as well as lifestyles, attitudes
and product consumption in nine markets across Asia
Pacific, and globally through a partnership with
BRMB (TGI).”
- Nielsen Sports (www.nielsensports.com) tracks
ad spending associated with sporting events,
as well as national and local TV ratings for sports
teams—by game, month, season and league stand-
ing. SponsorshipScout measures TV audience
exposure to all sponsor-placed media in any tele-
vised sporting event. Fan Link is a new service
linking sports fans to their actual shopping and pur-
buying behavior.
- Nielsen Tracking Service uses encoding
and monitoring technology to monitor TV advertising
and video store release occurrences. Nielsen’s
research examines the performance of English-
and Spanish-language networks and location stations in
all 210 U.S. TV markets. Nielsen and SigmaX offer
commercial detection services.
- Nielsen Games establishes new metrics for the
buying and selling of advertising in video games, while
also tracking the activities of gamers across other
media platforms, such as TV and digital signage.
- Nielsen Online (www.nielsen.com) is a
ratings currency for the online advertising market-
place. Its iCable-based online ratings system measures
exposure to outdoor advertising by tracking the travel
patterns of consumers in relation to known outdoor
advertising sites in Chicago and Los Angeles.

Nielsen Mobile
Nielsen Mobile (www.nielsennmobile.com), created
in 2007 with the purchase of Telephia, provides syn-
calized information research to the telecom and mobile
media markets. NM integrates Telephia’s services in
telecom with Nielsen’s global media and marketing
research capabilities, and uses its measurement tools
and large-scale consumer panels to understand the
digital consumer’s behavior, attitude and experience.

Nielsen Online
Nielsen Online (www.nielsen.com) delivers

Brand Research Solutions for Today’s Media Landscape
MSW Research has solutions to help you communicate
to busy people with the right message, in the right
place and at the right time. We can help you ...
- Engage your brand’s prime prospects
- Increase your brand’s prime prospects
- Communicate to address their needs
- In a multi-channel, multi-platform media environment...

Contact us today to talk about
solutions for your brand needs.
independent measurement and analysis of online audiences, advertising, video, consumer-generated media, word of mouth, commerce and consumer behavior, and includes products formerly marketed under the Nielsen/NetRatings and Nielsen BuzzMetrics brands.

For media research, media companies, ad agencies, advertisers and equity research organizations use NO’s Internet media research services to buy, sell and analyze online media—including audiences and advertising.

Key media research products include:

▶ NetView: This Internet audience measurement service provides a perspective on Internet audiences, including key measures and demographics, providing the industry with a view into activity on the Web and in the Digital Media Universe.

▶ AdRelevance: Captures advertising activity across all major industries, channels and ad formats and across most ad types, including all major forms of rich media, on the Web. It is an advertising expenditure measurement system for the Internet that mimics the actual online user population by automatically adjusting to traffic patterns.

▶ @Plan: A target-marketing platform for Internet media planning, buying and selling. It details the online population, capturing everything from basic demographics to in-depth lifestyle and brand preference data for identifying online target audiences.

▶ VideoCensus: Delivers audience measurement and analysis of online video usage.

▶ SiteCensus: A site-centric reporting system that provides server-side-visit reporting. It offers measurement for Web site analysis, newsletter and e-mail conversion tracking, ad and keyword measurement and audience assessment.

▶ Market Intelligence: Independent census-based measurement of audited Web sites within specific markets, provides granular audience measurement data. The service offers business effectiveness metrics, including unique browsers, page impressions, frequency and session duration, which constitute comprehensive, census-based research of audiences.

For market research, advertisers, marketers, and PR and advertising agencies use NO’s Internet research services to measure and analyze consumer-generated media (CGM), consumer behavior and trends. Specific vertical experience includes automotive, consumer technology, CPG/nutrition, financial services, pharma/healthcare, and media and entertainment.

Key market research products include:

▶ BuzzMetrics services measure, analyze and leverage online consumers who share experiences, advice and opinions on everything from corporate crises to customer service and product performance.

▶ Research and Analytics is custom client work based on client needs and leveraging NO’s data, analytics and vertical experience.

▶ Syndicated Studies include measurement and analysis of Internet activity—including audiences, advertising, video and CGM, around major events and topical issues including the Super Bowl, the Olympics, nutrition and sustainability.

▶ MegaPanel provides market research services based on a sample of 500,000-plus Internet users measured worldwide, offering insight into Web user behavior. Its survey research capabilities, combined with demographic and trend data and click stream analysis, are used to define and measure Internet marketing strategy.

▶ Homescan Online, in partnership with ACNielsen, measures both consumers’ offline purchasing behavior and online surfing activity.

▶ Strategic Services taps into the data sets of NO and across Nielsen. SS delivers consulting and advisory services based on data and supported by industry experience to support organizational needs related to digital and consumer-generated media.

Nielsen Entertainment

Nielsen Entertainment serves the global entertainment industry—including the film, book, home entertainment, music and interactive segments—with a broad range of marketing information, creative...
Marketing news 06.15. 08

PERQ/HCI provides healthcare audience measurement and ad expenditure services to advertising ACNielsen HCI, Scarborough Research, SRDS and Media Solution business unit includes PERQ/HCI, anywhere capability to test TV pilots around the Cinesys data service; the development of an anytime, to manage their data; the creation of a Web-based in building a new global EDI platform and bringing BDS airplay technology to Nielsen Music Control; and Nielsen Books: Nielsen BookScan (www.bookscan.com).

PERQ/HCI provides portfolio of six integrated pre- and post-launch online research services for the healthcare industry: Promotion Planning Model, CTS(Campaign Tracking System) PreTest, CTS PreTest, CTS Sales Test, CTS Plus and CTS MarketReview.

Scarborough Research, a joint venture between Nielsen Co. and Arbitron, identifies local regional and national shopping patterns and media usage of the American consumer. 58 surveys 218,000 adults age 18 and older on a variety of characteristics, including shopping, lifestyle, media and demographics. It serves advertisers and agencies, broadcast TV, cable systems, radio stations, newspapers, Internet, sports teams and leagues, and out-of-home companies.

SRDS (www.srds.com) is a leading provider of media rates and data. It offers coverage of traditional media—such as magazines, newspapers, television, direct marketing and radio—as well as alternative marketing opportunities, such as online and out-of-home.

IMS (www.imshealth.com) is an international provider of information systems and services for the media industry. It produces media planning and analysis software for both industry and proprietary research. IMS has clients in 79 countries.

Nielsen Connect (www.nielsenconnect.com) integrates the firm's store of consumer and media intelligence from dozens of business units to provide clients with customized services that integrate and deploy Nielsen's global data gathering and analytic capabilities. NC consists of five different businesses:

• Nielsen In-Store measures consumer exposure to an array of in-store marketing vehicles in partnership with the In-Store Marketing Institute.

• Combining media and market research intelligence on an individual client basis, NC provides a textured picture of consumer activity.

• NielsenHealth provides understanding of the total healthcare value chain of consumers, patients and physicians.

• NielsenLinx has created the Master Data Management service of transaction and reporting systems for the retail and marketing businesses to organize, manage and deploy data on brands, locations and media.

• NielsenLinx provides a view of the movements, behaviors and attitudes that are likely to have the most impact on clients' particular operations.

ACNielsen Homescan And Spectra

ACNielsen Homescan And Spectra (www.spectramarketing.com) delivers consumer and shopper insights for CPG companies through segmentation and targeting services. Homescan services are a global source of longitudinal consumer purchase behavior, demographic profiles, integrated attitudes and usage information and evaluations of the impact of media on actual behavior. Spectra services provide segmentation and targeting services to identify high value consumers, uncover new opportunities to communicate with specific consumer segments, and execute marketing and sales efforts at the store level.

Claritas

Claritas (www.claritas.com) provides marketing research demographic data, marketing software and market segmentation services. Claritas helps clients increase profitability, select the best site locations and market more efficiently and effectively by targeting the most profitable consumer.

BASES

BASES (www.bases.com) is a leading provider of pre-market consumer insights for marketers of consumer packaged goods. BASES combines primary consumer research with forecasting techniques to estimate the sales potential of new product initiatives prior to market entry.

Decisions Made Easy

Decisions Made Easy (www.decisions-made-easy.com) provides CPG manufacturers a way to effectively manage, analyze, present and act upon their sales and supply chain data. DMEM software and services integrate point-of-sale and other marketing and consumer information behind the client's firewall to support services to retailers and their shoppers.

IMS HEALTH INC.

Davide Carloucci

IMS HEALTH INC. (IMS) in Norwalk, Conn., was founded in 1976, acquired by Dun & Bradstreet Corp. in 1996, and became part of a separate public company, Covance Corp., in November 1996. In July 1998, IMS was spun off into a publicly traded company listed on the New York Stock Exchange.

IMS Health inC.

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Has your Panel or Community: Identified and motivated the right people to engage with? Achieved the optimal distribution? Crafted the right mix of messaging, media, and incentives for recruitment? Talk to the experts. We’re managing over 250 custom panels & communities worldwide.

From a simple review to a strategic panel research roadmap to comprehensive community, panel, and survey management— it’s your first stop on the road to success. Our strategy team has the expertise to help you build and manage your own panel or community.

Hear from the experts: discover the 7 keys to creating a successful online panel.
pharmaceutical brands. They provide insights and support decision-making relating to market segmentation and positioning, pricing and market access, promotion and performance management, and health economics and outcomes research.

- **Managed Care services** provide an array of information to quantify the effects of managed care on the pharmaceutical and healthcare industries.
- **Consumer Health services** provide detailed product movement, market share and pricing information for over-the-counter, personal care, patient care and nutritional products.

IMS’s Global Consulting and Services teams support strategic planning and decision-making with a combination of information and analytics. Customized analysis and interpretation of business intelligence is offered in key practice areas: Commercial Effectiveness, to help maximize value of sales and market investments; Pricing and Market Access, to help assess cost, value and anticipated consequences of therapies and treatment options; and Product and Portfolio Development, to assess portfolio opportunities by determining the value of various strategic options, and evaluating choices based on risk and return trade-offs.

IMS is launching new businesses in implementation services and business process outsourcing such as market research and sales force compensation and reporting.

In 2007, IMS continued to expand capabilities and support in areas such as market research and sales operations, focusing on new, high-growth disciplines such as promotion optimization, health economics and outcomes research and portfolio strategy.

IMS employs 7,950 full-time worldwide, and there are 2,034 employees in the United States.

**Millward Brown Group**

Millward Brown Group, based in Naperville, Ill., was founded in Warwick, England, in 1973 and acquired by WPP in 1989. In the United States it includes:

- Millward Brown (www.millward-brown.com) provides a full range of qualitative, quantitative and consulting services that address issues around brands, marketing communications, media and marketing effectiveness.
- MB works across a wide range of industries and categories, including brand strategy and experience, creative development and campaign evaluation, consumer needs and values, media planning and strategy, ROI and forecasting and investment management, brand valuation and analytics through the MB Optimizer unit, and demand and activation.
- Key products and services are:
  - Link: Copy testing of all forms of advertising
  - BrandDynamics: Brand equity evaluation, including BrandZ
  - Dynamic Tracking: Continuous tracking of key brand drivers
  - D&A: A framework for measuring impact of demand generating and sales activation activities
  - MBuzz: Measurement of online and offline word of mouth
  - AdIndex: Impact of digital marketing activity
  - Sales Response Modeling: Isolating and measuring marketing effects
  - Qualitative: Qualitative research and focus group services

In addition, MB Precis provides PR effectiveness metrics.

- Greenfield Consulting (www.greenfieldgroup.com) is a qualitative agency conducting focus groups and in-depth interviews for Fortune 500 companies globally, across both consumer and business-to-business sectors.
- Marketing and Planning Systems (www.mapsn.com) is a strategic research company and consultancy, which combines marketing science with consultancy skills.
- Dynamic Logic (www.dynamiclogic.com) measures the impact of digital marketing initiatives and the role they play in the broader cross-media mix.
  - The Focus Network (www.thefocus-network.com) is a network of three focus group facilities, including a new facility in Chicago’s Merchandise Mart.
  - BMRB (www.bmrbo.co.uk) offers services in conducting quantitative social policy and public interest research, media and marketing research, omnibus services, plus customer, employee and stakeholder research.

**Kantar Media Research**

Kantar Media Research (www.kantarmedia.com) measures the impact of digital marketing activities and the role they play in the broader cross-media mix. Kantar Media Research (www.kantarmedia.com) measures the impact of digital marketing activities and the role they play in the broader cross-media mix. Kantar Media Research (www.kantarmedia.com) measures the impact of digital marketing activities and the role they play in the broader cross-media mix. Kantar Media Research (www.kantarmedia.com) measures the impact of digital marketing activities and the role they play in the broader cross-media mix.
Space is the group’s qualitative research arm. It has offices in more than 50 countries, and RI Qualitative Research International (www.research-int.com), with headquarters in Chicago and London, was founded in 1973 and has been part of the WPP Group since 1989. It is a software group, specializing in marketing and media management.

Custom projects, including data fusion and database software systems, and managing customer loyalty.

KMR software

MARS pharmaceutical product, software systems, and managing customer loyalty.

MARS pharma and Intelliquest for positioning and messaging research.

Trialz: An approach for optimal phase III clinical trial endpoints.

RxOl: Market mix modeling of secondary market tracking to monitor brand and forecasting.

Icon Brand Navigation and Diagnostic.

RIG provides market intelligence with answers to specific business problems and generates insights into consumers and markets. It has experience in most major sectors, particularly CPG, retail, new media, financial services, energy and utilities, technology and telecommunications.

The firm offers products to address a range of strategic marketing issues and also provides e-healthcare services, software data systems for data analysis and consulting in serving the pharmaceutical and biotechnology industries.

The firm also provides subscription services and tools, which include Epiphemia, Forensic Archivist, CancerMetrics and Oncology Marketing Strategies.

Lightspeed Research

Lightsguided research (www.lightsguidedresearch.com) was founded by KG in 2000 and is based in Basking Ridge, N.J. The company operates in the United Kingdom, Mainland Europe and Australia.

LR is a provider of global online market research services. The firm specializes in using the Internet as a data collection platform to provide market research through building and maintaining panels subject to standards to ensure quality and representative sampling. Web technology and databases provide the foundation to support market research studies and specialty panels that range across industry sectors such as financial services, health-care, b-to-b, subject matter experts, Hispanic, automotive, family and more. LR also provides custom panels to address specific client needs.

Through its network of panels and accredited panel partners, LR can provide access to more than 17 million consumers across 54 countries. Consumer panels are available in North America, Great Britain, the Netherlands, Australia, Japan, France, Germany, Italy and Spain through partners, providing access to adults, teens, kids and other specialty audiences.

The EATLSOpinion panel, launched in 2007, provides access to panelists in the b-to-b arena. LLS acquisitions of both Ultimate Consumer Panel and Forsa International have enabled LR to expand the range of their services in financial services and employee satisfaction.

The Mattson Jack Group

The Mattson Jack Group Inc. (www.mattsonjack.com) was founded in 1989 and was acquired by KG in June 2003. The firm is headquartered in St. Louis and has six offices in the United States, one in the United Kingdom and an associate in Japan. MJC is a global healthcare and pharmaceutical consulting firm specializing in serving the pharmaceutical and biotechnology industries.

MJD’s core competencies include Business Analytics (epidemiology, market research, and modeling and forecasting), Corporate Development (licensing, market opportunity and scientific assessment, M&A and strategic planning), Brand Optimization (pre-approval and post-approval modeling, mix optimization and prescription influence mapping, pricing and reimbursement); and DiNovo Oncology Specialties (syndicated product, cancer care environment, and related channels and therapeutic areas).

The firm offers products to address a range of strategic marketing issues and also provides e-healthcare services, software data systems for data analysis and consulting in serving the pharmaceutical and biotechnology industries.

The firm also provides subscription services and tools, which include Epiphemia, Forensic Archivist, CancerMetrics and Oncology Marketing Strategies.

With over 20 years of solid growth serving the research industry, we want to thank you for your support and let you know that we’re looking forward to the next 20 while reviewing some of the highlights of the past 20 — things like:

- Introducing GENESYS — the first and only in-house RDX sampler/generator that enables researchers to control their sampling and reduce their costs.
- Launching virtuGENESYS — providing all the functionality of the time-tested in-house sampler system with Web-based 24/7 access and more.
- Pioneering sample screening services including the original automatic GENESYS-ID and the state-of-the-art GENESYS-SS attended screening service.
- Connecting PRO-T5® test/ProDictive dialers to multiple CATI systems and telephone configurations including VoIP while improving quality, accuracy and productivity and significantly reducing costs.
- Optimizing ARCH® IVR systems for inbound and outbound studies using telephone and Web platforms, or panel management and scheduling applications.

Although we’ll continue branching out in new directions to meet your ever-changing needs, and _yes_ we’ve spruced up our logo, our commitment to quality that you can count on will never waver.

The Premier Professional Development Program for Researchers Worldwide.

The Principles of Marketing Research course has become the research profession’s highest quality, most valued, and most widely supported educational program for core marketing research. Enroll anytime!

Graduate Testimonial

The Principles of Marketing Research course is very beneficial for participants from any part of the world. The certificate program is highly recommended for anyone who is pursuing a market research career and needs scientific knowledge in the field.

— Mookda Sompongkul, Managing Director, Research Matters Co., Ltd., Bangkok, Thailand

A course discount is available to AMA members and their company colleagues. Go to our Web site for more details.

For more information or to register for the course, go to www.principlesofmarketingresearch.org, e-mail Bob.Wells@georgiacenter.uga.edu, or call +1-706-542-6992.
Meet Your Focus Group Online

Whether your respondents are across cities, across the country or across the globe, let i.think inc. recruit and host your discussion in our secure online focus group room. You'll get their candid thoughts on anything including visuals, audio or video — all without leaving your home or office.

- Eliminates the time and expense of travel.
- Allows respondents the comfort and security of logging-in from home.
- You get more candid input than traditional face-to-face groups.
- Harnesses the current consumer communication trend of instant text messaging.
- Split screen interface allows moderator to interact simultaneously with front-room respondents and back-room clients.
- Immediate availability of session transcripts.
- Variable group size from intimate triads to large communities according to project needs. All recruited from the i.think inc. online research panel.

i.think inc.

[www.ithinkinc.com] 2811 McKinney Ave., Suite 350 Dallas, TX 75204 (214) 855-3777

in consumer insight, innovation and communications optimization. Core skills are setting future direction (cultural and trend analysis); identifying market opportunities (market segmentation and mindset mapping, brand portfolio management); strengthening brand equity (brand evaluation, diagnosis and strategy creation); innovation (ethnography, idea generation and development); evaluating ideas (marketing mix optimization, concept evaluation); optimizing communications (decoding and planning, copy testing); and communications performance optimization (planning, tracking, spend optimization).

- DR Added Value, based in Los Angeles, was founded in 1976 and acquired by Millward Brown in 1999.

▶ DR Added Value, based in Los Angeles, was founded in 1976 and acquired by Millward Brown in 1999.

The firm conducts consumer and b-to-b research across a number of product and industry categories and for all types of marketing issues. Major services offered are copy-testing, brand and advertising tracking, market/consumer segmentation, product design and customer satisfaction.

- Icon Added Value (www.icon-added-value.com), formerly Icon Brand Navigation GmbH, based in Nuremberg, Germany, was founded in 1993 and acquired by WPP in April 2001.

The firm is experienced globally in brand and communication research and consulting, integrating new thinking and advanced research with marketing consulting expertise.

Icon provides market research and consulting services, including brand communications, product research, brand tracking and customer satisfaction studies with offices in four countries. In addition, the firm offers support for advertising agency selection; coaching in brand management, communication development and agency management; and tailored seminars and workshops for defining brand identity.

Its research activities are built around a brand value management structure with four brand components: analytics, strategy, implementation and monitoring.

WESTAT INC. IN Rockville, Md., is an employee-owned company founded in 1961. The president and CEO of Westat is Joseph A. Hunt, 71. He earned an M.S. at the Massachusetts Institute of Technology.

U.S. revenue in 2007 was $467.8 million, up 10.4% over 2006. The growth rate excludes revenue from the acquisition of Eagle Design and Management in July 2006.

Westat conducts survey research for agencies of the U.S. government as well as businesses, foundations, and state and local governments. Major project areas include health, education, the environment, energy, transportation and social programs.

Some of its major statistical surveys measure educational progress and medical expenditures; others are long-term follow-up surveys concerning child development, employment and epidemiological research. The results of its research activities enhance reporting and performance of government programs, and inform policy planning and decision-making.

The firm continues to perform clinical trial work for the U.S. government, and pharmaceutical and biotech clients. In 2007, Westat expanded its international activities to support clinical trial in Costa Rica, South Africa, Thailand and China.

The firm continues to conduct CATI at five telephone research centers throughout the United States. Westat's nationwide staff of field interviewers uses computer-assisted interviewing methods on many large long-term surveys. To support and manage these large distributed operations, Westat
Westat also continues to expand its methods research capabilities, with an emphasis on maximizing respondent cooperation across a broad range of respondent types and applying Web technologies to survey information collection. It operates a behavioral research facility, specializing in Web usability studies to augment its cognitive laboratory and focus group capabilities.

The firm distributes and provides user training and support for its WesVar statistical processing software and for Blaise, a COTS software system for CATI and complex survey processing developed by Statistics Netherlands, and is used internationally.

Westat's staff includes 1,906 full-time salaried employees. In addition, Westat's telephone-interviewing, field-interviewing and data-editing staff averaged about 1,837 during 2007.

IRI, FORMERLY INFORMATION Resources Inc. in Chicago was founded in 1979 and became a public company in 1983, and majority ownership was acquired in 2003 by Symphony Technology Group LLC, a private company.

John G. Freeland, 54, is president and CEO of IRI, and Romesh Wadhwani, 60, is chairman. Freeland earned an M.B.A. at Columbia University, and Wadhwani earned a Ph.D. in electrical engineering at Carnegie Mellon University.

U.S. revenue in 2007 was $441.0 million, up 21% over 2006. In 2007, 37.2% of total revenue, or $261.0 million, was generated from outside the United States. IRI is a worldwide provider of consumer, shopper and retail market intelligence and insights for CPG, retail and healthcare companies. It offers a combination of integrated market information, automated and predictive analytics, enabling technologies and domain experience.

The firm operates in 58 countries through stand-alone operations, wholly owned subsidiaries, partnerships and alliances. IRI offers services in five areas:

**Comprehensive Market Content**

▶ **InfoScan Retail Tracking:** The census-based IRI InfoScan point-of-sale (POS) tracking service is among the industry’s most accurate retail tracking services, providing manufacturers and retailers access to detailed information on sales, share, distribution, pricing and promotion, across a wide variety of retail channels and accounts.

▶ **IRI AllScan Convenience Store Tracking:** The AllScan tracking service provides scanner-based POS data across the entire convenience channel. Using data from more than 15,000 sample convenience stores, AllScan provides business insights, information quality and accuracy at the national, regional and local market levels.

▶ Enhanced Shopper Insights: IRI and Euromonitor International have formed the world’s widest-reaching single panel research service. It combines the IRI Consumer Network household panel in the United States with Euromonitor to create a global consumer network representing 600 million households in 54 countries, including the United Kingdom, Germany, Japan, Brazil and Mexico. It also covers Russia and China exclusively.

In 2007, the IRI Shopper Insights platform continued to be enhanced by expanding the Consumer Network household panel and offering a series of integrated insights, shopper and specialty panels, which are enabled through a new portable, personal collection device. It also enhanced its Shopper Insights Explorer offering, providing an analytic-driven application built on the IRI Liquid Data platform that enables businesses to uncover and act quickly on fact-based insights into shopper segments, trip missions and buyer behavior.

**Automated, Predictive Analytic Insights**

Analytics offered by IRI include analytical modeling, consumer and shopper insights, and new product and...
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media testing services, supported by an experienced analytics staff. The IRI Marketing Mix Analytics services quantify, test and simulate return on marketing investment (advertising, trade promotion, coupons, pricing) for brands. The analytic tools decompose the drivers of current business trends and simulate the effects of changes on future brand plans. For scenarios that cannot be simulated using historical data, the IRI BehaviorScan in-market testing service is a new product and media testing capability that executes in-market media weight and copy tests. IRI also offers other testing services to compare in-store media, assortment and pricing decisions, as well as media plan alternatives.

Decision Support Services

In 2007, IRI unveiled IRI Liquid Data (ILD), a new end-to-end information management and insights platform. ILD supports business applications designed to provide comprehensive real-time information to enterprise business decision-makers. Developed in collaboration with IBM, ILD re-imagines how businesses make decisions based on immediate access to strategic information and insights. It leverages integrated data assets and redesigned workflows to predict the success of future decisions and initiatives to stay ahead of competition.

The ILD platform offers data management capabilities driven through a combination of IBM and IRI hardware, software, patented algorithms, industry models, data integration and supporting applications that are offered as a hosted service or as a separate infrastructure within the customer’s legacy data environment. The capability platform holds data in a flat or unstructured universe of points and leverages powerful, predictive automated analytics to generate information and insights to support specific decisions in minutes versus weeks or months.

Industry Vertical Services

IRI offers vertical experience and customized products and services for multiple industry verticals, including healthcare and wellness, center store, confections, beer, wine and spirits, bakery and dairy.

→ Healthcare And Wellness Insights: The IRI Healthcare Solutions Group provides pharmaceutical, healthcare, CPG companies and retailers with consumer intelligence, targeting and analytic services for the healthcare marketplace. It offers a suite of retail tracking, consumer panel and analytic-driven products and services under the RxPulse platform.

→ Beverage Alcohol Industry Insights: IRI delivers insights through an integrated view of the beverage alcohol industry. The retail tracking products and analytics are scaled to specifically meet the beverage alcohol industry needs for providing retail sales trends, purchase behavior and consumer insights in grocery, drug, mass merchandise, convenience, liquor and club stores.

IRI Partner Ecosystem

IRI has an integrated and differentiated “partner ecosystem,” formed to leverage the skill sets of the retail tracking and panel leaders, providing coverage, expertise, products and solutions. Complemented by relationships with sister companies in the Symphony Technology Group, partial ownerships, and strategic alliances, key strategic partnerships include:

→ Acxiom Corp.: IRI and Acxiom Corp., a leading provider of integrated data, services and technology that creates and delivers customer and information management services, extended its partnership in 2006. Its consumer insight services target specific types of consumers that have a high likelihood to want and buy selected product categories.

→ IBM Corp.: This partnership focuses on delivering on-demand market intelligence to the CPG, retail and healthcare industries using IBM software to support the development and delivery of IRI decision support software services and real-time market information processing. It provides a framework for all phases of planning, performance analysis and rapid decision-making required to optimize brand management, trade promotion, and sales and operations management.

→ IMS Health Inc.: This alliance provides integrated, longitudinal marketplace information, analytics and consulting services for the ethical (Rx), consumer (OTC) and CPG markets in the United States and Europe.

→ TiVo Inc.: This provider of digital video recorder (DVR) technology allows advertisers and brand marketers to understand the impact of changes on consumer viewing patterns and subsequent product sales, as well as the ability to quantify the effectiveness of specific advertising campaigns and brand recognition programs in TiVo DVR households. Utilizing second-by-second analysis and mapping it to actual consumer purchasing decisions, the relationship provides viewer and consumer insights from a national consumer viewing and processing of consumer insights in 54 countries, covering 88% of the global gross domestic product. It provides access and consumer visibility across multiple global markets and cultures.

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in Asia, Latin America, Europe and North America, as well as Brazil, Russia, India, China, Korea and Mexico.

IRI has 1,464 full-time employees in the United States and 3,655 worldwide. It has offices throughout the United States and in the United Kingdom, France, Netherlands, Germany, Greece, Italy and Spain.

TNS U.S. is the U.S. unit of Taylor Nelson Sofres plc, a public company based in London. Donald Brydon is chairman, and David Lowden, 50, is CEO of TNS. Lowden earned a B.A. in business administration at the University of Strathclyde in the United Kingdom.

U.S. revenue for 2007 was $379.8 million, up 2.8% over 2006. In 2007, 82.2% of total worldwide research revenue, or $1,757.4 million, was from outside the United States. The growth rate includes the 2006 and 2007 revenue of Sorensen Associates Inc., acquired February 2007; Cymfony Inc., acquired February 2007; Retail Forward Inc., acquired March 2007; Financial Services unit of Abt Associates Inc., acquired May 2007; and excludes Landis Strategy & Innovation LLC acquired December 2007.

TNS is a global market insight and information group, a major provider of custom research and a major supplier of consumer purchase panel, TV audience measurement and media intelligence services. It provides marketing information and measurement, together with insights and analysis, to local and multinational organizations.

TNS operates a global network spanning 80 countries and employing 15,267 people full time, with 2,000 U.S.-based. In the United States, TNS has three divisions—TNS Custom Research, TNS Healthcare and TNS Media—and more than 40 sales and service offices.

TNS Custom Research
TNS Custom Research is an integrated organization focused around industry sector knowledge with research experience in strategic business issues as well as analytic and consulting staff to help its clients make more effective decisions.

In addition to general custom quantitative and qualitative research, the division provides a wide range of proprietary services, syndicated research and managed access panels.

Dedicated business teams concentrate on major industries such as consumer goods and services (including food and beverage), OTC and health care, retail, restaurants, packaged goods, house and home, financial services (including banks, credit cards, insurance and investment services), technology and media (including entertainment, IT, telecommunications and sport), automotive, travel and leisure, transportation, utilities, social and polling research, and professional services firms and agencies.

Industry teams draw upon experienced staff in the areas of new product development, brand and communications advertising, sports marketing and sponsorship, multicultural, retail, and shopper and stakeholder management research. Much of this expertise resides in specialized areas of expertise aligned within the industry teams, including TNS Brand and Communications, TNS Product Development and Innovation, TNS Stakeholder Management and TNS Retail and Shopper Insights. Also included are specialty areas, including TNS Multicultural, TNS Qualitative and TNS Sport. TNS’s Advanced Analytics and Design group provides analytics and sampling, business modeling and strategic consulting.

In 2007, TNS acquired Retail Forward and Sorensen, expanding its offerings in retail and shopper research, and Landis, to expand offerings in new product development.

TNS services work on a global scale. Among them are NeedScope (emotional needs assessment), Conversion Model (brand commitment), AdEval (copy testing), WebEval (Web site evaluation), InnoSuite (volumetric forecasting), FutureView (new consumer behavior), RGM (Revenue Growth Management).
Manager), Online Safari (online ethnography) and TRI*M (customer satisfaction and relationship monitoring and management).

Syndicated research offerings include programs that provide insight for numerous industry sectors including financial services, travel, sport, telecom, technology and beverages. Key programs include Affluent Market Research Study (AMRPR), Consumer Credit Card, Travels America, American Traveler, ESPN Sportspoll, Kids Poll, Telecom Market Tracking, Bill Harvesting QSR (Quick Serve Restaurant) Tracking Study, Retail Forward Intelligence System, ShopperScape, Shopper Perspectives, Shopper360 and eSIP beverage monitor.

TNS operates Worldpanel and managed access panels (6thdimension access panels) in the United States and major countries in Europe and Asia, including specialty panels and custom proprietary panels.

**TNS Healthcare**

TNS Healthcare provides market research consulting to the worldwide pharmaceutical, biotech and medical device industries, as well as to health-focused ad agencies, media and analysts. It offers globally consistent services and custom advisory services for product introductions; brand, treatment and sales force performance optimization; and physician and DTC promotional assessment.

Informing decisions across the product life cycle, TNS Healthcare provides problem-solving across the product life cycle, including product development, pre-launch landscaping, market assessment, positioning and segmentation, message and campaign creation, pricing, forecasting, attitude and awareness measurement and post-launch tracking. Delivering insights across stakeholders—including physicians, patients and consumers—the division helps companies anticipate and impact customers’ behaviors. Its Street panel provides Internet access to more than 65,000 physicians in the United States and major European markets.

TNS Healthcare’s global frameworks include Brand Performance Optimization (BPO), integrating brand equity and market equity factors for a complete diagnostic view. BPO guides companies in building commitment, a powerful relationship metric, validated against prescribing data to predict Rx dynamics, protect share and prevent switching. It also offers a global Sales Performance Optimization framework, helping companies configure the optimal mix of physician experiences.

Through its Treatment Performance Optimization suite, TNS Healthcare links successful drug development with optimal commercialization. It also supports successful message and promotional strategy development. MessageEval evaluates up to 200 message elements, including text, graphics and sound. MarketWhy, a DTC tracking service, incorporates insights into patients’ Brand Commitment. In addition, the division’s DetailMed service delivers continuous tracking, from multicountry to subnational levels, of the physician/rep engagement, providing a globally consistent tool for comparing detail effectiveness.

TNS Healthcare also offers Cardio-Monitor (the world’s largest international cardiovascular patient database) and a suite of diabetes-focused tools, including DiabetesDynamics, a quarterly record of therapy changes and the reasons behind them in the Type-2 diabetes market; and DiabetesMonitor, in-depth information on patients who have not undergone treatment changes.

Offering qualitative and quantitative research through traditional and online methodologies, TNS Healthcare is a leading agency in the United States, the United Kingdom, Germany, France and Spain, and in 2005 it established a client service group in Italy. With offices throughout the Americas, Europe, Asia Pacific and the Middle East, it is positioned to deliver worldwide insights, supported by local country experts, helping companies make the most effective global and local business decisions.

**TNS Media**

TNS Media provides a comprehensive suite of marketing, media and audience insights, and global sets of measurement and analysis of consumer behavior services across all traditional and digital media. It delivers platforms for traditional and online advertising, audience, performance and engagement data services through:

- TNS Media Intelligence is a leading provider of competitive advertising and marketing information to advertising agencies, advertisers and media properties. Its tracking technologies collect advertising expenditure and occurrence data, as well as select creative executions, for more than 2.8 million brands, covering $150 billion in ad expenditures each year. It currently provides more than 3,000 clients in the United States with strategic advertising information across 20 monitored media.
- TNS Media Intelligence also delivers strategic intelligence in key industry marketplaces through its business units: Marx Promotion Intelligence, a source for freestanding insert coupon intelligence and other consumer promotion insights; and Campaign Media Analysis Group, a provider of advertising intelligence on the U.S. political marketplace.
- TNS Media Research provides Internet, TV and radio audience measurement behavior in more than 30 countries worldwide using fixed and portable metering technology and Return Path Data (RPD) from set-top boxes. The company has developed new measurement services via digital set-top boxes (STB), which are able to capture TV tuning information at census or near-census samples with second-by-second granularity.
- In addition to basic tracking services, TNS Media Research offers analytics that are instrumental to understanding new advertising formats such as addressable advertising.
- Cymfony, a brand monitoring and analytics company, sifts and interprets the millions of voices at the intersection of traditional and social media to gain insights that help organizations understand the people, issues and trends impacting their business. Combining automated analysis with human interpretation, it provides products and services that deliver intelligence on consumer preferences, competitor strengths and weaknesses, and other information critical to a company’s reputation, brands, products and employees.
- Compete, a leading digital intelligence company acquired in March 2008, helps global brands to improve their marketing based on the online behavior of millions of consumers. Compete’s services help to create effective online experiences and advertising campaigns. It segments and profiles shoppers to improve search marketing and online advertising efficiency, analyze the effectiveness of their marketing vs. competitors, and optimize their online interactions with customers and prospects.
- Theatrical Entertainment Services (TES) is a specialized service that provides detailed data on the Theatrical Exhibition marketplace (movie theatres) primarily for the motion picture advertising industry. TES specializes in designing programs such as trailer checking, sneak preview evaluations, theatre open checking, audience reaction audits, undercover theatre evaluations, mystery shopping and various other special projects.
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TNS announced a plan for field tests in Beijing, using the PPM system for radio audience measurement. In December 2007, TNS announced that the British Audience Research Board had awarded it two contracts to measure TV audiences and produce currency ratings in the United Kingdom beginning in 2010.

Arbitron has executive offices in New York, with sales offices in five U.S. cities and operations offices in six U.S. cities. Its research and technology organization, in Columbia, Md., provides support for the U.S. Media Services business and continues the development of the PPM technology.

Arbitron has 1,092 full-time U.S. employees.

**GfK USA COMPRESSES** the U.S. operations of GfK AG, a public company based in Nuremberg, Germany, and established in 1934. In August 2005, NOP World was acquired by GfK.

Klaus L. Wübbenhorst, 52, is the CEO of GfK AG. He earned a Ph.D. from Technical University in Darmstadt, Germany.

U.S. revenue in 2007 was $319.7 million, up 1.3% over 2006. In 2007, 80.1% of total worldwide revenue, or $1,603.0 million, was from outside the United States.

GfK AG is a worldwide market research organization providing services in three business sectors: Custom Research, Retail and Technology, and Media. The firm has 115 operating companies located in 90 countries with 9,070 full-time employees worldwide and 1,039 U.S. employees.

**Custom Research**

This sector specializes in operational and strategic marketing issues relating to nearly every industrial sector and market. The sources of information for the Custom Research sector are specific target groups of consumers and the medical profession.

GfK Custom Research North America is a full-service, fact-based research firm offering a wide range of ad-hoc and syndicated research products, strategic models and consulting services. Its industry-specific teams include GfK Automotive, GfK Consumer, GfK Financial Services, GfK Media and Communications and GfK Technology (includes industrial and b-to-b research). Key specialty practice areas include GfK Brand and Communications (includes GfK Starch Communications), GfK Customer Loyalty (includes GfK Mystery Shopping), GfK Roper Consulting (consumer trends), GfK Roper Public Affairs and Media (includes GfK Roper Omnibus Services) and GfK Qualitative and Ethnography.

A Research Center for Excellence serves as the firm’s in-house think tank of researchers comprising three divisions: Statistical Sampling and Methodology; Online Strategy and Methodology; and Marketing Sciences and Analytics. The firm also delivers research support and data collection services through Friedman Marketing Services as well as GfK Research Dynamics in Canada.

GfK U.S. Healthcare Companies comprises three healthcare marketing research agencies: GfK Market Measures, GfK Strategic Marketing and GfK V2. Together they form a major provider of U.S. custom healthcare marketing research services.

GfK Market Measures provides a mix of syndicated and custom marketing research services, supporting market assessment, brand tracking, message effectiveness, sales force effectiveness, healthcare consumer and product launch applications. The firm’s custom research expertise includes pricing, forecasting, positioning, concept testing, message development, promotional effectiveness evaluation and opportunity assessment. Major products include Therapeutic Class Studies,
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projective and elicitive techniques, to project methodologies, including cross-cultural uses a variety of qualitative research SimulatorSM. Also, its Qualitative Institute Hospital UniterSM and Perceptual Deficit mentation. Key products include UniterSM, clinical trial optimization and market segmentation. The firm also executes advanced analytics and quantitative research. Products include Information Architecture (product positioning), Competitive Analysis of Strategy and Tactics or CAST, Market Analysis of Patients and Products (MAPPs) patient flow/treatment maps and PracticeView (strategic account management).

Retail and Technology

Information on retail sales of technical consumer goods is gathered on a continuous basis in this sector, sourced from retailers. GfK Audits and Surveys focuses on delivering information and insights from retail-based research. The firm offers both custom and syndicated services to a variety of industry sectors. Among its custom services are distribution audits, controlled store tests, market description studies, in-store interviewing, trade sentiment studies and customer experience programs. Its syndicated services include the Annual Retail Census—a large in-person measurement of the U.S. retail and service marketplace—as well as sales tracking programs covering pet food and animal health pharmaceuticals, optical products and mobile content (games, music, ringtones, etc.). It has the unique ability to track dispensing data through professional channels that offer products directly to their clients such as veterinarians, opticians, etc.

GfK Equity Research Inc. provides retail sales data and analysis to institutional investors from sales receipts provided by retailer scanner data and other resellers (mail-order, Internet, specialist dealers, etc.). GfK processes sales data in more than 70 countries for virtually all consumer technology and consumer durable goods.

IFR Monitoring USA is experienced in retail in-store shelf analysis, retail ad display metrics and Internet advertising. It analyzes the presence of products and brands in the market at the various levels of retail shelves, retail advertisements and retail online sites, thus reflecting the market offers.

Media

This sector delivers continuous customized research on reach, intensity and use of TV, radio, print and online media through Mediarmark Research and Intelligence (MRI), which provides a picture of American consumers: who they are, what they buy, how they think and how to reach them. MRI offers demographic, attitudinal and product usage intelligence, as well as consumer usage of all major forms of advertising media. It provides information to magazines, TV, radio, Internet and other media, leading national advertisers and more than 450 advertising agencies, including 90 of the top 100 agencies in the United States.

GfK V2 conducts qualitative market research with patients and physicians. It uses a variety of qualitative research methodologies, including cross-cultural projective and elicitive techniques, to provide strategic counsel at each stage of the product life cycle.

GfK Strategic Marketing, with a full range of quantitative services, supports clients in areas such as pricing, forecasting, clinical trial optimization and market segmentation. Key products include UniterSM, Hospital UniterSM and Perceptual Deficit SimulatorSM. Also, its Qualitative Institute uses a variety of qualitative research methodologies, including cross-cultural projective and elicitive techniques, to provide strategic counsel at each stage of the product life cycle.

IPSOS IN NORTH America (Ipsos) is based in New York and is a unit of Ipsos Group SA in Paris, a public company founded in 1975 and listed on the Paris Stock Exchange in 1999. James T. Smith, 60, is CEO and chairman of Ipsos in North America. He earned an M.B.A. from Cornell University.

Ipsos in North America was $450.0 million, and for Ipsos Group SA was $1.27 billion.

Ipsos is a global survey-based market research firm providing services in five areas of specialization: advertising, customer loyalty, marketing, media and public affairs research. The firm has a full line of custom, syndicated, omnibus, panel and online research products and services, guided by experienced staff and supported by analytic methods. Ipsos conducts polling on behalf of The Associated Press.

Ipsos’ five areas of specialization are represented by five firms across North America:

▶ Ipsos ASI (www.ipsossai.com) is a worldwide provider of advertising pre-testing services. It offers a full range of advertising research services at all stages of the advertising development process, including copy testing, advertising tracking and brand equity evaluation. Ipsos ASI helps in the development, evaluation and improvement of advertising efforts.

▶ Ipsos Marketing (www.ipsosmarketing.com), the marketing research consultancy, provides services in market assessment, brand management, innovation and new product development. It offers experienced client services teams specializing in consumer products, technology, communications, health, pharmaceuticals, financial services, entertainment, foodservice, agrifood, energy, utilities, and lottery and gaming research.

▶ Ipsos Loyalty (www.ipsosloyalty.com) is a global, specialized practice in customer satisfaction management, customer relationship management, and employee climate management, supported by a modular suite of integrated research tools.

▶ Ipsos Media (www.ipsoss-media.com) provides research both to the editorial and advertising sides of media in key markets worldwide. Through syndicated studies and ad-hoc research, it informs editorial and media marketing decision-makers about the expectations, tastes and behavior of readers, listeners, viewers and Internet users.

▶ Ipsos Public Affairs (www.ipsosspa.com) specializes in corporate reputation, issues management, strategic communications and sociopolitical trends, serving the needs of corporations, nonprofit organizations, public relations firms, news media and governments. Its toolbox for conducting tailor-made research includes quantitative polling, qualitative focus groups, online panels, elite and stakeholder interviewing, syndicated subscriptions and other research techniques.

Ipsos employs 8,000 full time worldwide and 800 in 15 U.S. locations.
SYNOVATE, CREATED IN 2002 (formerly Aegis Research), was acquired in 1999 by the Aegis Group plc, a London-based public company listed on the London Stock Exchange.

Roberto Skolnick, 55, is CEO of Synovate North America. He earned a J.D. at the Brooklyn Law School. Adrian Chakravarthy is worldwide CEO for Synovate.

U.S. revenue in 2007 was $2.2 billion, up 4.9% over 2006. In 2007, revenue from outside the U.S. was $604.6 million, or 71.1% of total revenue. Revenue of Aegis Group was $2.2 billion in 2007.

Synovate is a global market research firm built around a fee-for-service organization whose flexible structure allows it to establish global teams wherever its clients are located, meeting their requirements and offering local access to the firm’s global knowledge and capabilities.

With fully owned operations in 121 cities in 77 countries, Synovate provides complete geographic coverage and service. Its clients range from Fortune 500 companies to enterprising start-ups and come from all sectors of business: consumer packaged goods, petrochemicals, media and advertising, government, quick-serve restaurants, financial services, retail, technology and more. The firm employs more than 5,000 staff worldwide with 832 full-time U.S. staff.

Synovate’s global practices and industry verticals include:

- **Synovate Brand & Communications**: The firm offers its Brand Value Creator, Market Barriers and other services to help grow brands and track how well communications are working.
- **Synovate Censydiam**: Known for its psychodynamic research, Censydiam creates a deeper understanding of human motivations and behavior, and its effects on products and brands.
- **Synovate Healthcare**: Global specialists deliver valuable insights to the pharmaceutical and healthcare industries, from ad hoc research and analytics to specialty medicine, including oncology, antiviral (HIV, hepatitis B and C) and immune (rheumatoid arthritis, multiple sclerosis, psoriasis and inflammatory bowel disease).
- **Synovate Loyalty**: This customer satisfaction and consulting service helps to develop and implement customer, employee and stakeholder loyalty programs and as well as

Synovate leads a comprehensive product development staff worldwide guiding clients through the product development cycle, from initial concept to ongoing performance monitoring, to ensure effective market decisions and accurate volume estimates for products or services.

- **Synovate MedRelevance**: The company provides a full range of research tools to help the automotive industry develop products with maximum pulling power. NASA-2A, its customer feedback program for automotive dealerships, provides dealers with immediate information on their customers’ experiences.
- **Synovate ViewsNet**: From customer behavior to customer feedback, panels can be accessed online, by telephone, by mail or face to face.
- **Synovate Aries**: This is the firm’s specialist offering in data processing, analysis and support services across the product, pharmacy, luxury, mass merchant and petrol/convenience channels.
- **Shopper research**: Synovate’s shopper insights capabilities provide retailers and manufacturers with research on shopper behavior and segmentation as well as in-store messaging and category/brand optimization. Equipment counts, tracks and studies shopper behavior in the store during all times of the day to assess the impact of promotions, shoplifting, store locations, layouts and other factors.

- **Media research**: The firm examines emerging trends and how changes in consumer behavior alter media relationships. This also includes a close look at media behavior and product ownership among affluent consumers in Latin America, Europe, the Middle East and Asia through Synovate’s PAX and EMS surveys.

- **维权 research**: Synovate’s ongoing research on youth attitudes and behavior, and contemporary culture across the globe provides a broad range of clients with strategy, insight and guidance as they navigate this continually changing market.
J.D. Power and Associates (JDPA) is a global marketing information services company that conducts independent consumer surveys of product and service quality, customer satisfaction and buyer behavior. Services include industrywide and client-commisioned research, business-to-business consulting, automotive forecasting, corporate training and performance improvement, and media research.

Annual syndicated studies are based on survey responses from millions of consumers and businesses worldwide. The firm does not review, judge or test products and services; it relies on the opinions and expectations of consumers who have actually owned the products and use the services being rated.

JDPA is best known for its work on the automotive industry, for which its metrics have become the industry standard for measuring customer satisfaction and quality. A team of associates worldwide conducts quality and customer satisfaction. A team of associates worldwide conducts quality and customer satisfaction research across industries including automotive, telecommunications, travel, real estate, finance, insurance, health care, utilities and consumer electronics.

The firm’s clients include many Fortune 500 U.S. companies and many internationally. JDPA has five U.S. offices and locations in eight countries. It has 620 full-time employees in the United States and 475 worldwide.

The firm has particular strengths in the areas of market research and strategy consulting, marketing communications (ad tracking and testing) and loyalty. Its industry experience includes advertising, government, consumer packaged goods, financial services, health care and pharmaceuticals, government, telecommunications, technology, automotive and transportation, as well as public policy and public relations.

In 2007, JDPA launched GlobalSynch, a global synchronized research platform. Its integrated web-based system provides increased speed, greater accuracy and easy real-time access to research data collected anywhere in the world regardless of collection mode. This online research platform can also send out more than one million e-mail invitations per hour and process 180,000 five-minute inbound surveys per hour or 15,000 surveys simultaneously.

Also in 2007, JDPA expanded its operations through acquisitions in Germany, Canada and Asia. It also extended its southern hemisphere presence with the addition of two new Global Network partners: INFOTek Research and Consulting in Korea and CNT Global in Brazil. JDA has 879 full-time U.S. employees and has subsidiary/affiliates in London, Hamburg, Germany, Paris, Toronto, Hong Kong, Mexico and Tokyo.

HARRIS INTERACTIVE INC. (HI), based in Rochester, N.Y., was founded in 1975 in Gordon S. Black Corp., and together with Louis Harris and Associates, which was founded in 1956, it became a public company in 1999. Gregory T. Novak, 45, is president and CEO of HI. He earned an M.S. in Management at Kraner Business School at Purdue University.

U.S. revenue in 2007 was $184.5 million, up 8.2% over 2006. Revenue from outside the United States in 2007 was estimated at $76.0 million, or 29.2% of total research-only estimated revenue, or $50.7 million, was generated outside the United States. The growth rate excludes 2006 revenue, or $25.8 million, which was generated from work conducted outside the United States. HI is a global custom survey research company that provides insights and strategic advice. The firm is widely known for The Harris Poll, one of the longest-running, independent-opinion polls, and for using online market research methods. It has built one of the world’s largest panels of survey respondents, the Harris Poll Online. HI serves clients worldwide through its North American, European and Asian offices, and through a global network of 14 independent market research firms.

The firm’s clients include many Fortune 500 U.S. companies and many internationally. HI has five U.S. offices and locations in eight countries. It has 620 full-time employees in the United States and 475 worldwide.
OPINION RESEARCH/GUIDELINE GROUP (OR/G) in Omaha, Neb., is the market research division of infoUSA Inc., a public company. OR/G was established in 2007 from acquisitions of four market research firms: Opinion Research Corp. (including Opinion Research and Macro International) in Princeton, N.J., in December 2006; NWRC Research in Melbourne, Australia, in July 2007; Guideline Inc. in New York in August 2007; and Northwest Research Group Inc. in Seattle in October 2007.

Vin Gupta, 61, is chairman and CEO of infoUSA. He earned a M.S. in engineering and a M.B.A. at the University of Nebraska. The president of Opinion Research is Gerald J. Miodus, 51. He earned a B.S. in economics at Michigan State University, Greg N. Mahnke, 56, is president of Macro International. He earned a Ph.D. in anthropology at Indiana University. Marc Littinovitch, 47, is CEO of Guideline. U.S. research-only revenue in 2007 was $124.7 million, up 4.5% over 2006. In 2007, 39.7% of total research-only revenue, or $82.9 million, was from work conducted outside the United States. The U.S. growth rate includes 2006 and 2007 revenue of Opinion Research Corp. and Guideline Inc., and excludes revenue of Northwest Research Group Inc. Total research and nonresearch revenue in 2007 was $206.7 million, up 4.5% over 2006. In 2007, 39.7% of total research-only revenue, or $82.9 million, was from work conducted outside the United States. The U.S. growth rate includes 2006 and 2007 revenue of Opinion Research Corp. and Guideline Inc., and excludes revenue of Northwest Research Group Inc. Total research and nonresearch revenue in 2007 was $206.7 million.

There are three operating units in OR/G:

▶ Opinion Research Corp. (www.opinionresearch.com): ORC has more than 125 years of experience working with virtually every U.S. federal government and agency and conducting research and related projects in more than 125 countries. Macro provides services to the public sector including research and evaluation, social marketing, information technology and management of marketing, strategic planning, market research, human resources, product management and public services executives worldwide. The firm has experience in the financial services, healthcare, information technology and telecommunications, and public services sectors.

In addition to its U.S. research practices, ORC delivers ORC Caravan, the oldest continuously running consumer omnibus survey in the United States; PR Plus, a PR-friendly research "survey in a box"; Out-of-Box Experience, a picture of consumers' impressions of electronic products as they are first unpacked, assembled and used; and the Customer Experience Evaluation tool, an online customer relationship survey process for mid-sized companies.

Through the Northwest Research Group (www.opinionresearch.com/northwest), ORC has added a presence in the Western United States and several new products, including CityMARKS, a citizen satisfaction measurement program for local governments; CSM Pactor, a customer satisfaction and loyalty measurement program focused on the areas that have a high impact on the customer experience; and Ideatelling, a brainstorming and idea generation process that combines the benefits of traditional in-depth qualitative research methods with online technology.

ORC also delivers the CNN/Opinion Research Corp. poll through a formal partnership with CNN, and has partnered with NYSE Euronext since 2005 to survey CEOs of the NYSE's listing companies on topics ranging from globalization and governance to strategy and human resources.

ORC and NRG have 106 research employees in U.S. offices in Princeton, N.J.; Chicago; Reno, Nev.; Toledo, Ohio; Tucson, Ariz.; Seattle; and Boise, Idaho.

▶ Guideline (www.guideline.com): Founded in 1969, Guideline provides a platform of qualitative and quantitative research, including b-to-b and b-to-c clients. Industry experience includes: health care and pharmaceutical, consumer-related financial services, insurance, consumer packaged goods, industrial, and advertising and professional services. The firm's qualitative research capabilities include: Internet/telephone/direct mail surveys, in-depth interviewing, live/virtual focus groups, new product testing, in-home use testing, FDA-related research and label comprehension, message testing, customer satisfaction and loyalty research, and claims substantiation and copyright infringement research.

Guideline has 73 full-time research employees across five U.S. offices in Boston, Chicago, Minneapolis, Minn., New York and Washington.

▶ Macro International Inc. (www.macrotionalternative.com): Macro has more than 40 years experience working with virtually every U.S. federal government agency and conducting research and related projects in more than 125 countries. Macro provides services to the public sector including research and evaluation, social marketing, information technology and management of marketing, strategic planning, market research, human resources, product management and public services executives worldwide. The firm has experience in the financial services, healthcare, information technology and telecommunications, and public services sectors.
ComScore Inc. (CS), based in Reston, Va., was founded in 1999 and listed on the Nasdaq Stock Exchange in June 2007.

Gian Fulgoni, 60, a chairman of cS and Magid Abraham is president and CEO. Fulgoni earned a master’s in marketing at the University of Lancaster in the United Kingdom.

In 1999, Fulgoni founded comScore Media Metrix (CMM) division, providing the syndicated audience measurement product of cS, the source of Internet audience measurement for advertising agencies, publishers, marketers and financial analysts. CMM reports details of online media usage, visitor demographics and online buying power for the home, work and university audiences across 100 local U.S. markets and around the world, including detailed reporting for dozens of countries. The division offers tools for reach and frequency analysis, day-part planning, online and offline local market analysis and emerging applications. CMM, under the cS Video Metric sub-brand, provides audience measurement data for streaming video.

In 2007, CMM released several new measurement tools: QuicksA, a global reporting of online search activity; Campaign Metrix, which measures the delivery of online advertising campaigns and its resulting sales online and offline; Brand Metrix, which reports on the impact of online advertising on a brand’s awareness and the attitudes and perceptions toward a brand; Segment Metrix, a new one-level behavioral targeting tool; cS Marketing a new search marketing tool kit; and Ad Metrix, which reports the number of display ads delivered by top Web sites with detailed demographics.

In 2008, cS plans to introduce Ad Monitor, which will measure display advertising by advertiser; Pan Metrix 2.0, monthly releases of Internet audience measurement data married with attitudinal data and Mobile Metrix, which will measure Internet traffic from mobile devices.

In addition to the government sector, Macro’s census survey services address business issues such as consumer segmentation, customer satisfaction, product and advertising evaluation and brand performance tracking. CMS integrates survey responses with online behavior passively captured for the same respondents.

cS data and services support numerous applications, including market and competitive intelligence for all online categories; benchmarking and opportunity gap/SWOT analysis; customer profiling and segmentation models; integration and study of online behavioral data with offline purchase data; choice models based on pricing, taxes and promotions, among other factors, controlled measurement of the effectiveness of interactive marketing programs, and scoring of customer files for direct marketing programs using markers and propensities derived from within the cS database and applied using shared attributes. cS e-commerce sales data have been widely published in the media for more than seven years.

CMS also integrates online behavior with offline purchase and product ownership data. The cS online tracking technology is being installed in the United States by 800 Omniture Resources Inc.’s Consumer Network consumer panel that measures CPG buying behavior across all retail channels. cS has also matched its database with clients’ offline buying databases to measure the impact that online marketing has on offline behavior.

CMS offers a full range of custom and syndicated survey research services for a variety of industries, using the cS panel with offline and online applications. CMS survey services address business issues such as consumer segmentation, customer satisfaction, product and advertising evaluation and brand performance tracking. CMS integrates survey responses with online behavior passively captured for the same respondents.

CMM provides a Customer Experience Management modeling service, health care, technology and telecommunications industries. The firm offers industry knowledge and expertise, analytical capabilities, unique market research programs and services, and client service orientation.

For clients conducting more than 1,000 telephone interviews per month, MSI has developed the Integrated Research Center solution to meet research program needs through a dedicated center, a custom-designed extranet portal and dashboard reporting system, and analytical services.

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ABT ASSOCIATES INC. in Cambridge, Mass., is an employee-owned company founded in 1950.

Wendell J. Knox, 60, is president and CEO of Abt. He earned a B.A. at Harvard University and an M.B.A. at the University of Michigan. Mark A. Schulman, 62, is president of Abt SRBI subsidiary. He earned a Ph.D. at Rutgers University.

U.S. research-only revenue in 2007 was $551.1 million, down 16% from 2006. The U.S. growth rate includes 2006 and 2007 revenue from the acquisition of Schuman, Renae & Bucuradas Inc. (SRBI) in July 2007, and excludes the Financial Services Research Practice sold in May 2007. Total revenue and nonrevenue revenue in 2007 was $280 million.

Abt is a full-service research and consulting firm whose research activities include marketing research for government, business, media, and foundation clients. Combining research and consulting services, the firm tailors individual services and strategies to help clients identify, understand, and respond to complex issues and problems.

Abt provides a full range of survey research capabilities, from sample design and instrument development, through data collection and data processing, to data analysis. It emphasizes technical quality, ensures confidentiality in measuring effectiveness, launching new products and improving customer satisfaction.

Abt SRBI is a full-service global public opinion and marketing research company serving many Fortune 500 companies, financial services and insurance organizations, advertising agencies, market research companies, federal government agencies, and university researchers. It is organized into six divisions:

▶ Analytic & Consulting Division has specialized practice groups in brand equity, advertising tracking, image and positioning, customer loyalty/satisfaction and market and customer segmentation analysis.

▶ Full-Service Survey Research Division conducts large-scale surveys and tracking studies for many U.S. federal government agencies and private businesses.

Hazardous Moves in Progress

At PRP we know that a successful campaign requires a little bit more than a perfect preparation.

There are many factors that can make a difference between success and failure: Values, strength, freedom, innovation, originality, creativity, precision, utility,.. and information. At PRP we provide the tools, research methodologies and the data you need to succeed in your plans. Incorporating our forward thinking approach, we give you not just information, but a strategic direction in each of your international markets. Multicountry research and consulting is an expertise. In today’s marketplace, the real challenge is not only obtaining information, it’s knowing how to turn it into meaningful insights and action.

If only I’d asked PRP…

**If you’re looking for a partner to:**

- help shape your brand

- access 201 countries

- work with 200 research partners

- get actionable results

- create a presence in key markets

- engage the right audience

- make your voice heard

- understand your consumers

- forecast trends

- analyze key drivers

- measure the impact

- drive change

- engage customers

- make better decisions

- break through barriers

- empower decision makers

- improve your story

- take the lead in your business

- get ahead of the curve

Call PRP today — the difference can be yours.

**Dear Professionals**,

We have a surprise for you. It is a bonus for you, a gift for you.

PRP is the research partner of choice for the top brands and agencies in the world. Thousands of clients and colleagues helping to shape the future of their organizations. Their insights have led to better products, markets, services and experiences.

PRP is a full-service research agency with over 20 years of experience in providing research solutions, from qualitative to quantitative, from traditional to online. We understand the needs of our clients and deliver high-quality, actionable insights that drive business decisions.

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Shelley Zalis, 46, is CEO and co-founder of OTX. She earned a B.A. from Barnard College of Columbia University. U.S. revenue in 2007 was $50.8 million, up 32.6% over 2006. In 2007, 6.8% or $3.7 million of total revenue was from outside the United States.

OTX is a global, full-service, consumer research and consulting firm that has established itself as a leading provider of online-based research. The firm blends online technology with experienced market research and agency professionals.

OTX serves the marketing, entertainment and advertising communities by providing online products to uncover consumer insights. Clients include packaged goods manufacturers, media companies and movie studios.

OTX specializes in understanding the impact of both traditional and emerging media and offers clear thinking on the convergence of brands and entertainment. With access to more than 40 million consumers worldwide, OTX provides a suite of syndicated products and also develops custom research.

Services offered to media and entertainment companies include testing for movie creatives, movie trailers, Web site appeal and design, global movie tracking in seven countries, daily TV program tracking and video game tracking. OTX is also an industry leader for movie screenings. For packaged goods companies and retailers, the firm offers advertising engagement testing and brand tracking, packaging and product concept testing, and uses virtual stores/shelf for pricing, assortment and any in-store marketing tests. For engagement, OTX uses biometric measures to get a more accurate read on the effectiveness of advertisers’ messaging.

New for 2008 is ConsumerMaps, a syndicated research tool that connects consumers with brands, and brands with other brands, based on key measures of recognition, attraction, presence and polarization. It offers continuous measurement of consumer sentiment, yielding 360-degree insight into the consumer-driven brand experience.

Also new for 2008 is the Longitudinal Media Experience study that investigates consumer attitudes and behaviors toward digital technology and its impact on traditional media. It evaluates interest and adoption patterns for new media offerings and device innovations and provides a roadmap for traditional brands that are entering the digital space and brands already in the digital space.

OTX has 184 full-time U.S. employees and offices in Los Angeles, New York, Cincinnati, Miami, Chicago and London, with strategic partners in Japan, Australia, Russia, China and Mexico.

OTX, based in Los Angeles, was founded in 2000 as a division of iFilm Inc. and acquired in 2004 by Zelnick Media Group and the Pilot Group.

With experience comes results.

Solve your greatest business challenges through our unmatched analytics and industry expertise in communications, energy, financial services, healthcare and technology.
multivariate analysis, and linkage and other modeling techniques.

Primary areas of focus include:

- **Custom Marketing Research:** Provides full-service custom research, analysis and consulting for consumer and b-to-b product and service companies to understand marketplace dynamics worldwide. Services include product testing, brand equity research, pricing research, market segmentation, image and positioning studies, and a wide range of marketing research protocols targeted at both tactical and strategic business issues.

- **Customer Loyalty and Relationship Management:** Helps companies develop and deploy customer loyalty and relationship management systems that focus internal resources on customer requirements.

- **Employee Engagement and Retention:** A key element of BI’s approach is employee engagement, which represents the strength of the overall connection between the employees and the organization, and includes commitment, involvement, relationships and initiative.

- **International Research:** Custom research and other research services are available worldwide.

- **Linkage and Integration:** Focuses on where to invest limited resources to optimize process effectiveness, employee commitment, customer retention and business results.

- **Online Research and Reporting:** BI’s online research provides Web survey design and data collection using the Internet. Its Digital Dashboard online reporting provides secure, real-time access to survey findings. BI also provides moderating of online focus groups.

- **Burke Qualitative:** BI’s qualitative division is experienced in using the full range of qualitative formats including focus groups, dyads, triads, mini-groups and one-on-ones. Moderators are versed in ladder ing, ethnographic research, scripting, and a variety of other qualitative and projective techniques.

- **Burke Healthcare:** Provides experienced and dedicated healthcare industry staff, many with professional accreditation and/or clinical backgrounds.

Burke has 217 full-time employees in the United States and 225 part-time employees.

**MVL GROUP INC.** (MVL), based in Jupiter, Fla., is a privately held firm formed as a holding company in 1998 and majority owned by Allied Capital Corp. in Washington.

M. Van Lefferdink is CEO of MVL, and Adam L. Rogers is president and COO. Van Lefferdink, 58, has a B.A. from DePauw University.

U.S. research revenue for MVL’s full-service research units in 2007 was $42.3 million, down 1.6% from 2006. Total revenue of MVL in 2007, including data collection and online units, was $78.7 million.

MVL’s full-service marketing research companies include:

- **Marketing Research Services Inc. (MRSI) in Cincinnati** provides custom research services in consumer goods, pharmaceuticals, healthcare, retail and restaurant industries.

  Its PRISM system utilizes quantitative and qualitative research tools to guide clients through one or more stages of product development.

  MRSI’s Hispanic research includes an in-house Hispanic research team of moderators, research consultants, analysts and project directors who conduct both qualitative and quantitative research among Hispanics, including the development of custom panels of Hispanic consumers.

- **Target Research Group (TRG) in Nanuet, N.Y.** offers Ad Trac (Advertising Evaluation System), which evaluates TV and print advertising for impact, persuasion and communication; Con Trac for concept screening; Fore Trac to predict sales on new products, line extensions and relaunches; Power Trac for optimizing concept and product acceptance and product retention; and Price Trac that identifies optimal pricing for new products.

MVL’s online research and data collection companies include:

- **Carbonview Research in Jupiter, Fla., launched in early 2005, uses a new approach to online research with its Authenticated Panel based on face-to-face recruitment at mall locations nationwide. This screening method provides access to hard-to-reach targeted consumers and 100% validation.**

- **Discovery Research Group in Salt Lake City specializes in interviewing and recruiting respondents via the telephone. Since its inception in 1987, DRG has grown to 1,000 dialing stations and has become one of the largest opinion and marketing research field service firms in the United States. In 2007, the firm opened a 48-seat center in Costa Rica.**

- **PhoneBase Research in Fort Collins, Colo., has conducted millions of telephone interviews involving research into virtually every U.S. industry since its founding in 1994.**
KNOWLEDGE NETWORKS INC. (KN), based in Menlo Park, Calif., is a privately held company founded in 1998. Simon Kooyman, 50, is CEO of KN. He earned an M.B.A. at Catholic University of Louvain in Belgium.

U.S. revenue for 2007 was $37.3 million, up 5.7% from 2006.

KN specializes in solving complex, high-impact problems, providing quality and service to business, government and academia. KN works closely to create healthy consumer-brand connections, effective marketing and advertising, sound public policies and accurate social science research. It has established client-focused strategic business units for custom marketing research and government and academic research.

KN excels in study design, analytics and custom panel creation, delivering statistically valid online research through KnowledgePanel, a probability-selected, nationally representative Internet panel. The firm specializes in media and advertising analysis, brand health, brand communication testing, segmentation, new product opportunities and evaluation, public opinion and social issues. Other KN resources include the National Shopper Lab, a panel of eight million frequent shoppers available for in-store and new product research.

The firm also maintains an extensive program of research on research, studying the ways that different research methods and respondent cooperation—including panel creation and maintenance—can directly affect the information marketers use to make decisions.

KN operates from six U.S. offices in Menlo Park, Calif.; New York; Chicago; Cincinnati; Cranford, N.J.; and Needham, Mass. There are 180 full-time employees.

NATIONAL RESEARCH CORP. (NRC) in Lincoln, Neb., was founded in 1981 and has been a public company since October 1997.

Michael D. Hays, 53, is NRC’s president and CEO.

U.S. revenue in 2007 was $37.3 million, up 1.9% over 2006. In 2007, $4.0 million, or 9.7% of total revenue, was from outside the United States.

NRC offers performance measurement and tracking and improvement services to hospitals, healthcare systems, physicians, health plans and other healthcare organizations.

NRC provides three primary types of information services:

▶ The NRC+Picker Group provides the most important aspects of the patient experience by combining the advance measurement and improvement technology of NRC with the philosophy and family of surveys of the Picker Institute. eTool-kit allows clients to act on their research results and attain improvement in the care delivery process. In addition, NRC Custom Research measures market characteristics or issues specific to individual healthcare organizations, including consumer recall of promotional and branding campaigns, consumer response to new service offerings, and provider perception of health plans and healthcare organizations.

▶ The NRC Healthcare Market Guide is an annual study of more than 200,000 households assessing consumers’ perceptions of and satisfaction with hospitals, health systems and health plans in more than 190 markets across the country. The guide provides consumer satisfaction ratings for medical care, access and administrative services on more than 800 health plans. Consumer quality perceptions, product-line preferences, service use and visit satisfaction are available for 3,200 hospitals and health systems by name. The guide also studies household health status, presence of more than 20 chronic conditions, alternative medicine use and other health behaviors.

▶ The Picker Symposium Educational Products provide a way of bridging the gap between measurement and improvement of patient-centered care and consists of the Picker Institute International Symposium, the Learning Network and eLearning.

NRC has 181 full-time and 56 part-time employees in the United States.
A company that develops long-term partnerships with its clients in which substantial responsibility for design, analysis and presentation is handled by dedicated client teams. DRI’s client service staff averages 20 years of experience.

DRI provides custom services, including many product and concept testing systems. The firm also regularly executes a wide variety of studies, including market segmentation, conjoint/discrete choice, awareness tracking, attitude and opinion, market structure and customer value/customer satisfaction.

DRI has a team of experienced marketing scientists and data analysts to provide insight and value to its analyses. This typically includes graphical and multivariate statistical techniques, such as conjoint, Kano, correspondence analysis, discriminant, factor analysis and clustering.

The firm has extensive experience handling research for packaged goods, restaurant, retail, financial services, technology and pharmaceutical companies. Its studies are conducted among consumers, professionals, medical staff and other business-to-business respondents using a broad range of data collection methods. DRI partners with industry data-collection specialists who provide high-quality data at competitive prices. This approach keeps DRI focused on research design regardless of data collection methodology.

Since its introduction in 2002, DRI has been using Navigator, a product-testing norms database in which results have been compiled from a broad array of nearly 5,000 food and other consumer packaged goods tests conducted over the past 10-plus years. This tool, developed with input from the University of Georgia, provides guidance for product test research design and adjusts for the effects of common design elements on any of the frequently used scales.

DRI has built a concept testing database that provides norms for all key measures for a wide-range of business segments. The database reflects a design philosophy of “competitive context” with the inclusion of existing products as benchmarks. It provides trial potential forecasts based on the specific competition the client’s new ideas will face in the current marketplace.

DRI has placed senior client service staff in close proximity to key account clients with offices in Chicago, Charleston, S.C.; and Dallas. The firm employs a full-time staff of 120.

26 PHOENIX MARKETING INTERNATIONAL www.phoenixmi.com <AL DECOTIIS

PHOENIX MARKETING INTERNATIONAL (PMI) in Rhinebeck, N.Y., is a privately held company founded in 1999.

Allen R. DeCotiis, 55, is chairman and CEO of PMI. He earned a Ph.D. in administration and statistics at Emory University. Sanford Schwartz, Ph.D., is president. U.S. revenue for 2007 was $33.5 million, up 26.5% over 2006. In 2007, $1.4 million of revenue, or 4.0%, was from outside the United States. The growth rate includes the 2006 and 2007 revenue of Johnston, Zabor, McManus Inc. acquired January 2007.

PMI is a marketing research firm that combines primary and syndicated research experience with database analytics and modeling to serve the financial services, consumer packaged goods, healthcare, automotive, travel and leisure industries. Its dedicated analytical and model groups include Phoenix Communications and Brand Analytics, List Op (response marketing) and Multicultural Research.

The firm has eight industry research groups: financial services, automotive, affluent, converged technology, multicultural, travel and leisure, health care and newly formed media research. Among its syndicated products are Affluent Market Services, Card Performance Tracker, Small Business Credit Card Tracker, Hotel Scores, Investment Services, Advertising Metrics, Credit Card Advertising Metrics, Retail Banking Advertising Metrics, Automotive Concept X and Virtual Mailbox.

PMI has offices in New York, New Jersey, Connecticut, Pennsylvania, Boston, Detroit, Los Angeles, Miami, Chicago and Durham, N.C. It has a full-time staff of 137 employees.

27 LIEBERMAN RESEARCH GROUP www.liebermanresearch.com <MARK LEFKOWITZ

LIEBERMAN RESEARCH GROUP (LRG), based in Great Neck, N.Y., is a privately held corporation founded in 1966.
think BIG

to find the answers

We love talking with CONSUMERS.

They have the ANSWERS.

ANSWERS on the economy, retail purchase behaviors, brands, consumer confidence, category spending, gas price pain, and consumer saving and tucking on their wallet.

BIGresearch tallies with over 7,000 consumers every month and has for over six years. Consumer answers are highly predictive of economic, financial, and sales forecasts and are used by the top companies in the U.S.

BIGresearch provides answers that help companies:

Listen Understand Anticipate Respond

To the Consumer.

International Communications Research

By Allen Khoram

International Communications Research (ICR) in Media, Pa., was founded in 1983. In 1996, it has a subsidiary of Mount Laurel, N.J.-based AUS Inc., a privately held company.

ICR president and CEO at Allen Khoram.

ICR’s monthly omnibus survey research for revenue in 2007 was $38.1 million. ICR is a full-service market research firm specializing in designing customized methods using in-house resources, including three interviewing centers, a data center and a staff of experienced researchers. Its clients include market research experience in four key areas: market and product development, brand and communications, consumer choices, and satisfaction and loyalty.

Recent introductions include:

• Brand Connections: Measures brand value and points the way to building a brand through the meeting point of customers’ needs and desires, lifestyle and cultural context, and the rational and emotional benefits a brand delivers.

• B-Link: Identifies the relationships between what consumers seek from a product or service and the features that deliver these benefits. Understanding these relationships enhances the product development process and provides guidance for developing marketing communications strategy.

• Price Sensitivity Modeler: This simulator produces expected sales results in a graphical output window after entering prices for competing products. With supporting cost data, the modeller can reflect forecasted changes in sales volume and revenue/profitability.

Analytic and insight services are made available to vertical practices through its Advanced Analytics Team and Qualitative Methods Team. These teams develop and implement approaches such as discrete choice modeling, segmentation, database modeling and hybrid ethnographic-survey methods.

MoRpace has employed the Internet and 359 part-time employees.

66, is president, Ward earned a B.A. in marketing from the University of Pennsylvania in 1983. McDonald earned a D.B.A. at University of Kentucky.

U.S. revenue in 2007 was $28.7 million, down 4.7% from 2006. In 2007, 13.6% of total nonresearch revenue for ICR. ICR in Media, Pa., was founded in 1983.

Flexible interpretation are reported using a database system linked with software and hardware network.

ICR maintains a dedicated Web portal featuring tabulations produced with EXCEL, a twice-monthly survey research and consulting firm with a global capability and culture diversity required to conduct research worldwide.

Services and tools include a telephone center with 400 CATI-equipped stations with speed-dialing capabilities, a database system linked with software and hardware network.

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Flexible interpretation are reported using a database system linked with software and hardware network.
MarketCast’s research services include positioning analyses, focus groups, advertising testing, tracking studies, research screenings, volumetric forecasts, A&P studies, brand studies, segmentation studies and product launch studies.

The firm is experienced in the measurement of individual consumer pre-dispositions toward entertainment choices, and in translating such predilections into predictions about future behavior on an aggregate basis. These include box office projections, volume forecasts for DVD sales, or estimates of future entertainment technology penetration.

MarketCast has adapted statistical methodologies from other industries to the circumstances of the entertainment business. These methods improve the reliability of research and increase the stability of predictions made about future consumer behavior. This technology and approach form the foundation of all of MarketCast’s research services, which is applied to varied and complex problems in the entertainment industry.

MarketCast employs 36 full-time.

DATA DEVELOPMENT WORLDWIDE

In 2000 by Reed Elsevier plc in the United States revenue for 2007 was $25.1 million, up 2.0% over 2006. MarketCast is a marketing research firm that provides a number of research services, which is applied to varied and complex problems in the entertainment industry. MarketCast employs 36 full-time.

DATA DEVELOPMENT WORLDWIDE

C&R Research is a full-service market research company specializing in both qualitative and quantitative research. The firm has a number of experienced professionals providing the firm with the capability to handle the most challenging of projects.

C&R’s research specialties include consumer insights, needs assessment, segmentation, attitude and usage, concept and product development/testing, brand imagery/positioning, advertising development/evaluations and customer satisfaction tracking.

In addition to their research capabilities, C&R has a number of specialized divisions, bringing demographic experience and further customization to their projects.

LatinoEyes has a team of dedicated professionals with understanding of both the U.S. Latinos culture and more than 15 years specializing in the Latino market.

C&R Casts focus on what drives the boomer market and how their brand can harness the purchasing power of boomers. Backed by segmentation, C&R has the experience to conduct effective research and interpret the findings to make intelligent and informed decisions.

C&R also offers online kids, teens, moms and Latino panels, providing demographics for customized research projects. For each of these segments, they also offer a monthly omnibus.

In addition, C&R will release YouthBeat 2008, a syndicated report that offers a comprehensive and in-depth view of today’s youth based on 10,000 monthly interviews of kids, teens and twentys ages 6 to 18.

C&R has 121 full-time employees.

Creative Minds. Intelligent Solutions.

Our senior partners and project managers are the interviewees. The collaborators are highly trained. Your team communicates with you throughout the project. That’s market research. With a difference.

We partner with you to identify information that will help your business, providing strategic solutions, solutions that can alter the course of your business.

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

Creative Minds. Intelligent Solutions.

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INFORMA RESEARCH SERVICES Inc. (IRS), Calabasas, Calif., was founded in 1983 as Meyer Interest Rate survey, acquired in 1993 by BISYS Group, and then acquired again by London-based Informa plc in 2000. Michael E. Adler, 44, is president and managing director of IRS. He earned an M.B.A. from the Marshall School of Business at the University of Southern California and his J.D. from Loyola Law School.

U.S. revenue for 2007 was $23.5 million, down 6.7% from 2006. IRS is a provider of market research in the financial, retail, and travel and leisure markets, and provides daily competitive intelligence and market analysis to clients in the financial industry.

Much of IRS’s custom research experience came from its acquisition of Barry Leeds & Associates in 2003 and Market Trends Inc. in 2004. IRS’s full-service division specializes in managing the customer experience and understanding the customer point of view. Its researchers are experienced in all phases of market research: mystery shopping; customer satisfaction and loyalty; brand equity, awareness and usage; new product and usability testing; legal and match pair testing; and compliance, discrimination and misleading sales practices testing. IRS is experienced in the use of market research to limit the risk associated with allegations of discrimination, predatory lending and misleading sales practices. It pioneered the use of mystery shopping and matched pair testing for this purpose and developed the technique for post-application testing to detect discrimination and predatory lending.

The firm provides customer experience information by measuring their progress through a metric called CERScore, providing post-transaction interviewing and a Web-based reporting product, which measures and reports customer satisfaction and customer problems within 48 hours of a recent customer experience. A Web panel of more than 100,000 Informed Consumers for mystery shopping, interviewing and online surveys is maintained. The firm has a full-time U.S. staff of 189.

NATIONAL ANALYSTS INC. (NA) in Philadelphia was established as the market research unit of Curtis Publishing in 1911 (publisher of The Saturday Evening Post), became a separate privately owned corporation in 1943 and was reorganized as an employee-owned company in 2004. Susan Schwartz McDonald, 58, is chairman and CEO of NA. She earned a Ph.D. at the University of Pennsylvania’s Annenberg School.

Over 22+ Million Online Panelists In 54 Countries WORLDWIDE

Specializing in:
- Consumer and B2B
- IT Decision Makers
- Physicians and Patients
- C-Level
- Hispanics
- International Physicians (UK, EU, Japan, Brazil, Mexico)
- Programming with Online Real-Time Reporting and Analytical Capabilities Available
- Over 400 Segmentation Variables Available

U.S. revenue in 2007 was $22.3 million, down 12.1% from 2006. NA is a market research and consulting firm that addresses business issues in a wide range of industry sectors, including pharmaceuticals, information technology, financial services, package transport and consumer goods. Its depth of marketing experience in key industries, combined with customer market research capabilities, makes NA a hybrid organization, providing services ranging from problem conceptualization to strategy development and implementation.

Types of projects routinely conducted by NA include market segmentation, opportunities assessment and demand forecasting, pricing, positioning and market entry strategy, product development, brand equity, portfolio strategy and lifecycle management. To create primary data for those assignments, NA conducts both qualitative and quantitative research utilizing a portfolio of data collection methodologies and analytic techniques. NA’s history of innovation includes advances in statistical sampling, early development and application of focus group methodology, and work in consumer and business market segmentation.

Project leaders are supported by an in-house team of methodologists and a portfolio of modeling tools that are readily customized to address marketing problems. Its own NA-Quest Web software enables complex survey design.

The firm is widely known for its skills in building integrated forecasting models that reflect the interactions of multiple stakeholders and customers (such as health care and b-to-b marketing). Clients have access to a range of decision software supporting diverse modeling applications.

On record as the world’s oldest marketing research entity (1911), NA is a founding member of CASRO. It employees 73 professionals full time.

SERVICE MANAGEMENT GROUP (SMG), based in Kansas City, Kan., is a privately held firm founded in 1990. Andy Fromm, 40, is president and CEO of SMG. He earned a B.A. at Boston University.

U.S. revenue in 2007 was $22.4 million, up 22.4% over 2006. In 2007, $600,000 or 2.6%, was from outside the United States. SMG is a full-service research firm providing store-level customer experience measurement in 60,000 locations that is integrated into service improvement systems for multi-unit retail,
MARKET PROBE INC. (MPI) in Milwaukee is a privately held company founded in 1976. Its Rx models (Loyalty Rx, Brand Rx and Equity Rx) provide the means to set goals and take into account costs of improvements in different key areas. Its Rx Optimizer has been developed to help clients test what-if scenarios. The firm’s Web Reporter is a survey analysis tool that explores client data in near real-time. Customized reports are created and exported to PowerPoint or Excel. MPI creates many standard tools: graphic and text-based reports that can illustrate powerful sorting and filtering mechanisms. Fast-based filters include exact and phonetic matches, allowing easy detection of patterns within the data.

In January 2007, MPI acquired Ask Business Marketing Intelligence NV, based in Brussels, Belgium, which specializes in agricultural research and 4-b research. MPI’s research portfolio focuses on customers (CRM, customer loyalty management solutions, benchmarking programs), employees (employee satisfaction metrics, employee commitment programs, HR applications and communications) and brands (brand health management, market segmentation, new product development), also with related research in product quality and distribution/brand strategic relationships. MPI contributes to the research industry’s knowledge base through the publication of articles and books, including Analysis of Customer Satisfaction Data. Linking Customer and Employee Satisfaction to the Bottom Line, and Assessing the Customer Experience: Its Rx models (Loyalty Rx, Brand Rx and Equity Rx) provide the means to set goals and take into account costs of improvements in different key areas. Its Rx Optimizer has been developed to help clients test what-if scenarios. The firm’s Web Reporter is a survey analysis tool that explores client data in near real-time. Customized reports are created and exported to PowerPoint or Excel. MPI creates many standard tools: graphic and text-based reports that can illustrate powerful sorting and filtering mechanisms. Fast-based filters include exact and phonetic matches, allowing easy detection of patterns within the data.

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Hitwise is one of the world’s leading online competitive intelligence services that provides insights on how 25 million Internet users worldwide interact with more than one million Web sites across more than 160 industries. This volume of Internet usage data is integrated into a Web-based service designed to help marketers better plan, implement and report on a range of online marketing programs. The firm methodology is independently audited on an annual basis.

Hitwise has developed a network-based approach to Internet measurement through relationships with ISPs around the world. Its patented methodology, which utilizes “unbiased” data collection through a sample of Internet users, delivers a wide range of products and services:

- **Hitwise Rankings** provides an overview of key players and Web sites across industry categories and customer segments.
- **Hitwise Search Intelligence** is a key-term analysis of search trends across the Web.
- **Hitwise Conversions** includes a wide range of conversion-related statistics.
- **Hitwise Lifestyle** identifies the top-performing sites that attract the most desirable customers and provides data on the segments that visit client and competitor sites. This includes Experian Mosaic data.
- **Hitwise Demographics** define a Web site’s user base by key demographics including age, gender and geographic location.
- **Hitwise Conveying** creates customized charts detailing how Web sites, industry categories or search terms perform against each other.
- **Hitwise Lesbian, Gay, Bisexual, Transgender (LGBT) Demographics** feature an analysis of LGBT Web sites.
- **Hitwise Clickstream data** provides reports on the upstream traffic to and downstream traffic from a specific Web site, industry or custom category. This includes new and returning visitor data.

Hitwise Industry Statistics provides an overview of trends in any of Hitwise’s 160-plus industries.

Hitwise Lifestyle identifies the top-performing sites that attract the most suitable customers and provides data on the segments that visit client and competitor sites. This includes Experian Mosaic data.

Hitwise Conveying creates customized reports that provide detailed information on how customers interact with specific sections on competitive Web sites, and which customer acquisition tactics have proven to be most successful.

Hitwise Demographics defines a Web site’s user base by key demographics including age, gender and geographic location.

Hitwise Charting creates customized charts detailing how Web sites, industry categories or search terms perform against each other.

Hitwise Custom Reports include all data available within the Hitwise database that can be especially tailored to suit business reporting needs.

Hitwise University is an on-demand training and education resource for all Hitwise clients.

In 2007, the firm launched three services: Paid and Organic Search Tools, New and Returning Visitors Data and Mosaic: Consumer Segmentation System.

Hitwise has 75 full-time U.S. employees and 261 employees worldwide in offices in the United States, the United Kingdom, Australia, New Zealand, Hong Kong and Singapore.

**Walker Information**

**Steven Walker**

**Walker Information (WI)**, based in Indianapolis, is a privately held company founded in 1999. WI’s president and CEO is Steven F. Walker. WI earned a B.S. in sociology and a B.A. in English and history from Boston University. U.S. revenue in 2007 was $17.1 million, down 9.3% from 2006. In 2007, $3.9 million or 18.6% of total revenue was from outside the United States.

KIIR’s customized, multidisciplinary, marketing research and consulting services facilitate accuracy in client understanding and decision-making. KIIR capabilities include service/product concept testing and development; market opportunity assessment and segmentation; brand/customer loyalty assessment and analysis; business retention/attraction predictive modeling; advertising testing and measurement; channel and partner strategy; and pricing/buyer behavior research.

The firm specializes in global b-to-b research across industry segments, including information technology, telecommunications, transportation, utilities, health care and financial services. KIIR also has extensive experience in consumer markets, especially related to technology interface and the retail environment.

Dedicated teams conduct projects from concept to completion. The majority of KIIR staff are experienced both as buyers and providers of research, and the average senior staff member has 10 to 25 years of experience. The firm is not limited by geography, cultural or language barriers, delivering surveying, translation, measurement, modeling and presentation worldwide. In 2008, the firm launched a best practices speakers bureau to enable heightened transfer of expertise and service.

KIIR owns and operates INSTITUTE, a 110-seat contact center; a unified, global, data collection and partner network; and Centers of Excellence in quantitative and qualitative research. The firm employs 194 full-time and has offices in New York; Atlanta, Memphis, Tenn.; Seattle, and Frankfurt, Germany.

**KS&R, Inc.**, headquartered in White Plains, N.Y., is a privately held company founded in 1976.

Vincent Cama is CEO, and Rita L. Reicher is president of KS&R. KS&R, a full-service marketing and research research and consulting services facilitate accuracy in client understanding and decision-making. KS&R capabilities include service/product concept testing and development; market opportunity assessment and segmentation; brand/customer loyalty assessment and analysis; business retention/attraction predictive modeling; advertising testing and measurement; channel and partner strategy; and pricing/buyer behavior research.

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dedicated team of consultants focusing on responding to client needs, expanding their offering by building a strong national presence and working on an extension of their clients’ staff. BRI’s clients span a wide array of industries including automotive, CPG, health care, telecommunications, utilities, retail, finance and technology.

BRI conducts research among both client-side and/or vendor-side marketing research experience. Its consultants have on average 20 years of client-side and/or vendor-side marketing research experience.

Science: This is incorporated into the research process through the use of experimental design and advanced analytical techniques. Its Marketing Sciences staff has advanced degrees in statistics, with the department head holding nearly 30 years of experience.

Advocate: BRI’s approach to building long-term, mutually beneficial relationships that address business issues includes short-term satisfaction and long-term loyalty tracking, market segmentation, concept development, product optimization and price elasticity across many industries.

Today BRI encompasses the design and development of software and tools that enhance its ability to gather data and design online surveys, benchmarks and b-to-b interviewing. POS uses two different research techniques to reach more than two million interviews with voters from city council to the presidential level, with more than two million interviews with voters from city council to the presidential level.

BRI is a top 50 research firm and was selected by Taylor Nelson Sofres plc in March 2008. POS was acquired by Taylor Nelson Sofres plc in March 2008.

In 2007, BRI moved its corporate headquarters to a new 20,000 square-foot office building in Westin Falls, N.C., which also includes a fully-equipped focus group facility. BRI employs 95 full-time employees.

In 2007, BRI introduced a new technology platform that supports a 300 CATI-station inbound/outbound telephone center, a nationwide network of MVR, and Jon Pinnell is its president. BRI employs 95 full time.

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Technology. Part 500 and 824 on the Inc. 5,000. Compete has 100 full-time employees.

SAVITE RESEARCH COMPANIES (SRC) in Dallas is a privately held corporation founded in 1981. Jeffry N. Savitz is founder and president of SRC. He earned an M.S. and an M.B.A. at the Wharton School of the University of Pennsylvania.

U.S. revenue in 2007 was $14.8 million, down 2.6% from 2006. In 2007, 18.5% of total revenue, or $3.1 million, came from outside the United States.

The firm, with 97 full-time employees, addresses a variety of research needs including:

- Customer Satisfaction: Designing tools for analyzing consumer satisfaction and loyalty.
- Product Quality: Leveraging positive product attributes, as well as identifying those aspects that hurt consumer perceptions of quality.
- Advanced Product Research: Gathering and interpreting consumer opinion throughout the product development process, including the creation of new product profiles, product usage profiles, concept validation, prototype evaluations and marketplace launches.
- Qualitative Research: Using focus groups, one-on-one and executive interviews, online groups and independently uncovering information important to marketing endeavors.
- Internet Research: Conducting online research among businesses and consumers, as well as Web site usability testing.
- Statistical Modeling and Consulting: Integrating data from multiple sources and transforming it into actionable, strategic insights. RKI's statistical capabilities range from multivariate techniques to customized modeling and analysis.
- Six Sigma Consulting: Supporting and validating Six Sigma initiatives. RKI's Six Sigma Black Belts consult on the use of customer voice and the analysis of data from Six Sigma projects in order to measure the impact of process improvement on revenue, profitability and growth.
- Global Research: Adapting research design, survey development, data collection, language and analytical insights to the local cultures and conditions in both the emerging and developed markets of North America, Europe, South America and Asia Pacific.

While initially focused entirely in the United States, GRI is a full-service, custom market research company that specializes in research methodologies that support the entire product development process and establishes the best research practices, from the idea generation to concept testing, to product development, concept testing, voice of the customer, product testing and price/feature optimization. In consumer immersion techniques provide in-store research to support a variety of initiatives for retail clients. The firm also provides a wide range of research methods to support marketing decision-making, including emotional connections, segmentation and positioning.

Contact us for a quote on your next project! mail@marketresearch.com or visit us at www.epocrates.com/services/marketresearch/
MARKETING ANALYSTS INC. (MAI), based in Charleston, S.C., is a privately held company founded in 1982. Robert Pascale, 53, is founder and chairman of MAI, and Richard Serrins, M.S., is president and CEO. Pascale earned a Ph.D. in applied research and statistics at Hofstra University, and Serrins earned a B.A. at Hofstra University.

U.S. revenue for 2007 was $12.8 million, down 3.0% from 2006. In 2007, 5.9% of total revenue, or $800,000, was from outside the United States.

MAI is a full-service custom market research and consulting company with 39 full-time employees that focus on four areas:

- MAI Consumer Packaged Goods
- MAI Rx (medical and pharmaceutical)
- MAI Insights (branding)
- MAI Financial

Client engagements include both custom and strategic marketing research services. Among its product and purchasing offerings are choice modeling, concept and product testing, shelf packaging research, product-line research (LinOpt) and category development (VMS). MAI's consumer and customer research includes segmentation, target panels and tracking studies, and its communications activity consists of copy research, brand personality and image identity (Brand Intelligence) and positioning studies.

The company has offices in Charlotte, N.C., and Morris Plains, N.J., in addition to its Charleston, S.C., headquarters.

R &T MARKET RESEARCH & BRAND STRATEGY

WESTERVILLE, OH

Tom Pfeil, 40, is co-founder and part-
ner of TLG. He earned an M.B.A. from the City University of New York. Mel Rothstein, 64, is chairman and CEO of RTI. He has a B.A. from Hunter College, City University of New York. U.S. revenue for 2007 was $12.2 million, down 3.0% from 2006. RTI is a marketing- and business-focused research company addressing both consumer and b-to-b issues, providing cus-
tom research services designed to align with client business objectives and brand-specific strategic priorities.

While the majority of problems are solved with custom designs, RTI's research tools provide added levels of services. Among these are:

- BrandIndex: A facilitated, interactive strategic marketing tool used to define all aspects of a brand's competitive position, leading to better strategic and research decision-making.
- Qualidex: A satisfaction and loyalty research program designed to help prioritize improvement efforts by focusing on the aspects of service that have the largest impact on overall satisfaction.
- RTI Portfolio Manager: This provides the means for decisions regarding line extension or reduction. The model measures volume opportunity rather than reach.
- Construction Test: A product development tool that is used to identify optimal combinations of new product or service components.
- Freshplay: After a quantitative screening of ideas, concepts or benefits, Scann Pay provides an easy and powerful way to consider these multiple opportunities and determine which make up the optimal set.
- Webcents: Using stats audience response technology, quantitative and qual-
itative research can be combined in a single two-hour session. It also provides cost, speed and learning benefits to a client's team.

RTI’s management-style presentations are carefully created management communications tools. RTI’s other facilities include testing. Today, each high-tech ventilation box is equipped with washers, dryers, kitchen sinks, microwaves and internet links to simulate home environ-
ments. QRS’s other facilities include observational household rooms, state-of-
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MaRKeTinG analysTs inC.

www.marketinganalysts.com

ANal ysTs iNC.

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