

THE 2011 HONOMICHL TOP 50 REPORT

Sunnier days have arrived for the marketing research industry. Read on for the good news about U.S.-based research spending and research industry employment. And check out the Top 50 rankings to see which firms top the list for U.S. revenue generation in 2010.

BY JACK HONOMICHL

Good news! Revenues from the purchase of marketing, advertising and public opinion research services within the United States grew by 4.7% from 2009 to 2010. Inflation in 2010 was 1.6% and, after adjustment for that, the so-called “real growth” in the U.S. market research industry’s revenues last year was 3.1%. The industry swung to growth last year after two years of revenue declines. In 2009, research industry revenues dropped by 3.3% and in 2008, they dropped 2.2%. So the research marketplace in 2010 enjoyed a significant turnaround and, as a byproduct, saw an approximately 8.7% increase in the number of full-time employees on research firm payrolls. This doesn’t make up entirely for the personnel cutbacks in 2008 and 2009 (estimated at 11.1%), but it is a big step in the right direction. Anecdotal evidence suggests that hiring has continued apace into 2011.

These are the main findings of this, my 38th annual marketing research industry business review prepared exclusively for *Marketing News*.

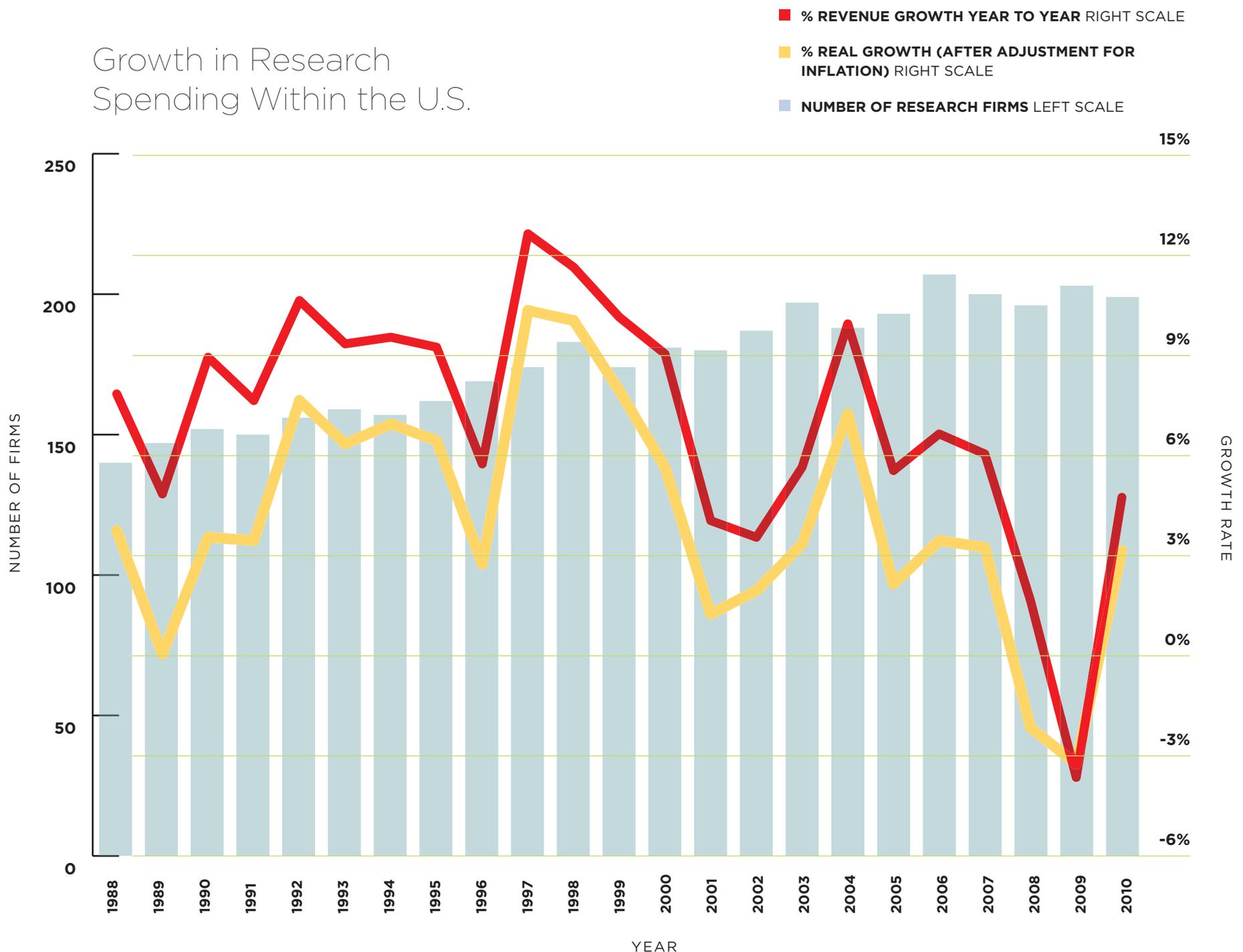
The core inputs for this analysis are the revenues of what are believed to be the 50 largest U.S.-based research organizations. They are asked to submit market-research-only revenues from operations in the U.S. for calendar 2009-2010. (Many firms have revenues from nonresearch activities and considerable revenue from outside the U.S., and that is explained in the company profiles that follow.)

Third-party verification is required on revenues claimed by privately held firms, but the bulk of Top 50 revenues comes from publicly listed companies or subsidiaries of public marketing service firm conglomerates, as outlined in the individual company profiles. In two such cases—Kantar and J.D. Power and Associates—the parent company doesn’t release details on subsidiaries and their revenues must be estimated—but those estimates are believed to be very close to the mark. Also, IMS Health went private in 2010, so its revenue total also was estimated.

Eight of this year’s Top 50 made acquisitions during 2010 (for a total of 10 buys) and this “acquired revenue” was adjusted before calculating a firm’s growth rate year to year. Either the acquired revenue was eliminated for 2010 and the base year (organic), or it was included in full for both years, thus providing an “apples to apples” calculation. Had this not been done, the growth rate would have been artificially hyped. Again, this mergers and acquisitions activity is documented in the company profiles, a “must read” if you really want to understand how the industry fared during 2010.



Growth in Research Spending Within the U.S.



In toto, this year's Top 50 had revenues of \$8.5 billion within the U.S. during 2010, an increase of 4.9% (or 3.3% after inflation adjustment). This revenue growth occurred pretty much across the board; only eight of the Top 50 had revenues go down in 2010 or not grow enough to cover the inflation rate.

The important supplement to Top 50 data comes from the Council of American Survey Research Organizations (CASRO), which has for years provided the revenues in total for its member firms that are not on the Top 50 list. For 2010, that revenue total amounted to \$755 million, up 3.3% from 2009 (or 1.7% after inflation adjustment). The firms not on the Top 50 list are relatively small firms. Their average annual revenue is just \$4.9 million. There were 149 such firms in 2010, and the lion's share of their revenues was from operations within the U.S.

Put the Top 50 and CASRO inputs together, and this year's analysis is based on 199 firms, which had revenues of \$9.2 billion within the U.S. during 2010 (or 3.1% after inflation).

Looking Beyond the List

The database described above includes input from for-profit research organizations. It does not include considerable expenditures from other sources, which conduct sizeable research operations within the

U.S. Start with agencies of the federal and state governments, which conduct considerable data collection projects in-house or through nonprofit survey facilities.

Federal government agencies alone in 2010 spent an estimated \$5.4 billion on what the federal government calls "major statistical programs"—and about 75% of those programs are run in-house, according to the U.S. Office of Management and Budget. The rest of the federal government's research spending goes into the private sector, but only three of the Top 50 firms—Westat, Abt SRBI and ICF International—get most of their revenue from federal projects. (The federal expenditure of \$5.4 billion does not include the U.S. Census. That is a separate, stand-alone budget.)

Almost all states conduct surveys, usually focusing on tourism. Many of these surveys are conducted by universities and there is no credible estimate of what the spending on such research adds up to.

In addition, there are literally dozens of nonprofit survey organizations affiliated with universities, such as the University of Michigan's Survey Research Center and the National Opinion Research Center (NORC) at the University of Chicago. Again, there is no official estimate for how much money is spent through these facilities, but it's safe to say that the spending total is in the hundreds of millions of dollars. Also, there are consulting firms that



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concentrate on government contracts and, in the process, do survey work in-house, and some of these firms are major players. Mathematica Policy Research and Rand Corp. are examples. Some information industry firms, such as Gartner and Forrester Research, provide industry research reports via primary survey research and there are numerous boutiques that specialize in esoteric methodologies like neuroscience. None of these organizations are included.

Also, there are numerous buyers of research services who are, more and more, choosing to satisfy their needs with work done in-house. One estimate from a roundtable of market research buyers for the *Inside Research* industry newsletter says that up to 10% of many buyers' research budgets stay in-house. This translates into millions of dollars, but there is no credible estimate for the total.

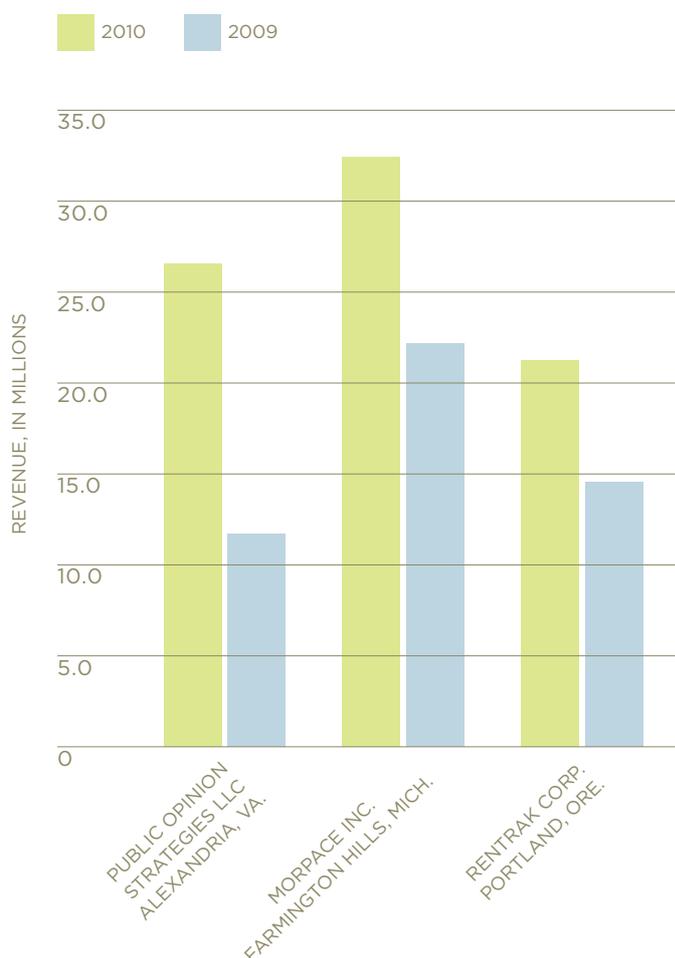
While this Top 50 analysis represents \$9.2 billion in research spending, mostly through commercial, for-profit firms, the total spending for research services in the U.S. is probably north of \$15 billion, all things considered. Unfortunately, for many reasons, we'll never know the actual total.

Global Involvement

While the goal of this annual analysis is to quantify the research spending in the U.S.—thereby serving as a growth index—it should be noted that the Top 50 firms are very international in nature, major players on the world stage.

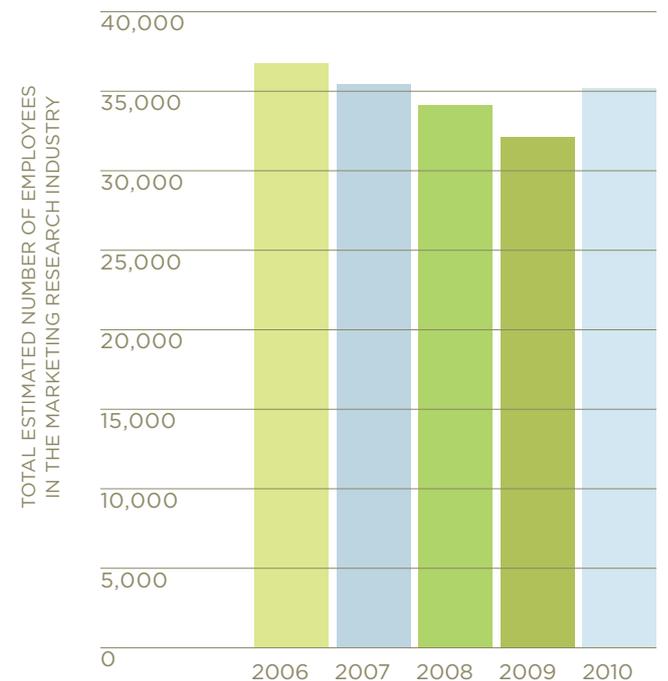
Of this year's Top 50, for instance, 36 firms have revenues from outside the U.S., for a total of \$10.4 billion. Many of the Top 50 are subsidiaries of research conglomerates based in other countries and are managed by foreign nationals. Conversely, many large, U.S.-based firms have extensive operations outside the U.S. through subsidiaries and branch offices. Nielsen, tops on the Top 50 list since the rankings began 38 years ago, in 2010 had revenues from operations in 108 countries. IMS Health operates in more than 100 countries, J.D. Power and Associates has offices in nine countries, and so on.

Biggest revenue gains in 2010 among Top 50 firms



The marketing research job market

TOP 50 FIRMS PLUS 149 CASRO COMPANIES



Changes in the List

Every year there are new firms on the Top 50 list and 2010 was no exception. For this edition of the Top 50 list, there were seven additions: ICF International, No. 11 this year, appears because it acquired the Macro International unit of ORC International. Vision Critical Communications, No. 27 this year, represents the multi-branch office presence of a Canadian firm in the U.S., a major player in community panel development. Market Force Information, now No. 21, is the result of a three-firm merger, and its emphasis is on customer satisfaction measurement and mystery shopping. The Pert Group and Affinnova are full-service survey firms, and Peryam & Kroll returns to the list from previous listings.

Dropping off to make room was OTX, ranked No. 20 on last year's list, which didn't make the list this year because it was acquired by the Ipsos Group, No. 7 on this year's list. Six others—CMI, Savitz Research, RDA Group, StrategyOne, Bellomy Research and The Link Group—aren't on the list this year because of revenue levels.

Company Profiles

As noted earlier, much of the rich detail amassed by this annual analysis is to be found in the individual company profiles that follow. At the beginning of each profile is a brief profile of the firm's executive leadership, followed by two or three paragraphs describing ownership, revenue, merger activity, etc. Each firm's product offerings are described, as are its industries of concentration such as healthcare, financial and automotive. In short, the profiles are a guide to suppliers that might add considerably to your business interest. Take a few minutes to skim through them.

Methodology

Invitations to market research firms with estimated annual U.S. revenue of more than \$10 million are sent in January of each year requesting revenue information for the prior year, a company profile of activities and other company metrics. Top 50 rankings are based on U.S. revenue. The rate of growth from year to year has been adjusted to account for revenue gains or losses from acquisitions or divestitures. Verification of revenue is required of each private firm for ranking by a third party, generally its outside accounting firm. For further information, call Larry Gold at 847-525-0707 or Jack Honomichl at 847-382-3246. **m**

TOP 50 U.S. MARKET RESEARCH ORGANIZATIONS

U.S. Rank 2010	U.S. Rank 2009	Organization	Headquarters	Website	U.S. Research Revenue ** (\$ in millions)	Percent Change From 2009***	WWR esearch Revenue ** (\$ in millions)	Non-U.S. Research Revenue ** (\$ in millions)	Percent Non-U.S. Revenue	U.S. Full-Time Employees
1	1	The Nielsen Co.	New York	Nielsen.com	\$2,407.0	4.5%	\$4,958.0	\$2,551.0	51.1%	9,566
2	2	Kantar*	London & Fairfield, Conn.	Kantar.com	914.7	7.5	3,183.6	2,268.9	71.3	4,135
3	3	IMS Health Inc.*	Norwalk, Conn.	IMSHealth.com	801.0	NC	2,211.6	1,410.5	63.8	1,560
4	5	SymphonyIRI Group	Chicago	SymphonyIRI.com	457.0	2.4	720.0	240.0	33.3	1,198
5	4	Westat Inc.	Rockville, Md.	Westat.com	455.3	-9.4	455.3	--	--	1,964
6	6	Arbitron Inc.	Columbia, Md.	Arbitron.com	390.4	2.8	395.4	5.0	1.3	951
7	7	Ipsos	New York	Ipsos-NA.com	379.6	9.0	1,512.8	1,133.2	74.9	1,246
8	8	GfK USA	New York	GfKamerica.com	290.9	0.6	1,718.0	1,471.1	83.5	877
9	9	Synovate	London	Synovate.com	235.8	9.9	884.8	649.0	73.3	762
10	11	The NPD Group Inc.	Port Washington, N.Y.	NPD.com	173.7	4.8	240.1	66.4	27.7	815
11	--	ICF International Inc.	Fairfax, Va.	ICFI.com	153.2	8.0	200.1	46.9	23.4	1,000
12	10	J.D. Power and Associates*	Westlake Village, Calif.	JDpower.com	147.3	-10.4	231.4	84.1	36.2	459
13	13	comScore Inc.	Reston, Va.	comScore.com	142.0	14.8	175.0	33.0	18.9	673
14	12	Maritz Research	Fenton, Mo.	MaritzResearch.com	140.9	8.6	162.1	21.2	13.1	612
15	15	dunnhumbyUSA LLC	Cincinnati	dunnhumby.com/us/	110.7	26.7	195.0	84.3	43.2	173
16	14	Harris Interactive Inc.	New York	HarrisInteractive.com	93.9	-6.2	166.8	72.9	43.7	443
17	19	Abt SRBI Inc.	Cambridge, Mass.	AbtAssociates.com	86.8	11.2	129.4	42.6	32.9	1,700
18	16	Lieberman Research Worldwide	Los Angeles	LRWonline.com	82.3	11.8	100.8	18.5	18.4	357
19	17	Market Strategies International	Livonia, Mich.	MarketStrategies. com	67.6	2.0	80.7	13.1	16.2	257
20	18	ORC International	Princeton, N.J.	ORCInternational. com	63.9	1.0	98.0	34.1	34.8	243
21	--	Market Force Information Inc.	Louisville, Colo.	MarketForce.com	52.8	17.6	53.1	0.3	0.6	385
22	21	National Research Corp.	Lincoln, Neb.	NationalResearch. com	49.0	4.9	53.8	4.8	8.9	239
23	25	Knowledge Networks Inc.	Menlo Park, Calif.	KnowledgeNetworks. com	48.5	20.6	48.5	--	--	161
24	23	Burke Inc.	Cincinnati	Burke.com	45.4	16.7	50.8	5.4	10.6	205
25	22	MVL Group Inc.	Jupiter, Fla.	MVLgroup.com	45.0	12.8	45.0	--	--	390
26	26	Communispace Corp.	Watertown, Mass.	Communispace.com	43.6	25.6	47.8	4.2	8.8	295
27	--	Vision Critical Communications Inc.	Vancouver, B.C.	VisionCritical.com	43.0	29.9	62.0	19.0	30.6	49
28	27	Directions Research Inc.	Cincinnati	DirectionsResearch. com	37.5	11.3	37.5	--	--	128
29	28	Phoenix Marketing International	Rhinebeck, N.Y.	PhoenixMI.com	35.8	14.0	41.2	5.4	13.1	113

TOP 50 U.S. MARKET RESEARCH ORGANIZATIONS										
U.S. Rank 2010	2009	Organization	Headquarters	Website	U.S. Research Revenue ** (\$ in millions)	Percent Change From 2009***	WWR esearch Revenue ** (\$ in millions)	Non-U.S. Research Revenue ** (\$ in millions)	Percent Non-U.S. Revenue	U.S. Full-Time Employees
30	24	International Communi- cations Research	Media, Pa.	ICRsurvey.com	\$35.4	-2.5%	\$36.2	\$0.8	2.2%	287
31	36	Morpace Inc.	Farmington Hills, Mich.	Morpace.com	32.5	46.4	38.0	5.5	14.5	125
32	32	Lieberman Research Group	Great Neck, N.Y.	LiebermanResearch. com	30.1	19.9	30.1	--	--	106
33	31	Radius Global Market Research	New York	Radius-Global.com	29.2	5.8	30.6	1.4	4.6	92
34	30	Service Management Group Inc.	Kansas City, Mo.	SMG.com	28.5	0.4	29.8	1.3	4.4	155
35	29	MarketCast	Los Angeles	MarketCastOnline. com	27.6	-3.2	32.3	4.7	14.6	50
35	49	Public Opinion Strategies LLC	Alexandria, Va.	POS.org	27.6	135.9	27.6	--	--	31
37	33	Informa Research Services Inc.	Calabasas, Calif.	InformaRS.com	24.9	6.4	24.9	--	--	198
38	35	C&R Research Services Inc.	Chicago	CRresearch.com	23.5	3.1	23.5	--	--	108
38	34	National Analysts Worldwide	Philadelphia	NationalAnalysts. com	23.5	1.3	23.5	--	--	77
40	38	KS&R Inc.	Syracuse, N.Y.	KSRinc.com	22.0	11.7	26.6	4.6	17.3	168
41	37	MarketVision Research Inc.	Cincinnati	MV-Research.com	21.8	0.5	21.8	--	--	96
42	--	The Pert Group	Farmington, Conn.	ThePertGroup.com	21.7	32.3	21.7	--	--	93
43	43	Rentrak Corp.	Portland, Ore.	Rentrak.com	21.3	45.8	31.9	10.6	33.2	117
44	--	Peryam & Kroll Research Corp.	Chicago	PK-Research.com	20.1	31.4	20.1	--	--	110
45	39	Market Probe Inc.	Milwaukee	MarketProbe.com	19.8	8.7	45.7	25.9	56.7	80
46	--	AlphaDetail Inc.	San Mateo, Calif.	AlphaDetail.com	18.6	30.1	18.6	--	--	53
47	40	Q Research Solutions Inc.	Old Bridge, N.J.	QResearchSolutions. com	17.3	9.5	17.5	0.2	1.1	75
48	44	Gongos Research Inc.	Auburn Hills, Mich.	Gongos.com	17.2	30.3	17.2	--	--	93
49	--	Affinnova Inc.	Waltham, Mass.	Affinnova.com	17.0	26.9	21.3	4.3	20.2	97
50	47	RTi Market Research & Brand Strategy	Stamford, Conn.	RTiResearch.com	16.6	36.1	16.6	--	--	50
Total					\$8,490.8	4.9%	\$18,814.1	\$10,293.2	54.7%	33,217
All other (149 CASRO companies not included in the Top 50)****					\$755.4	3.3%	\$883.6	\$128.2	14.5%	3,345
Total (199 companies)					\$9,246.2	4.7%	\$19,697.7	\$10,421.4	52.9%	36,562

* Estimated by Top 50 authors.

** U.S. and WW revenues may include nonresearch activities for some companies that are significantly higher, as well as revenues from other MR companies. See individual company profiles for details.

*** Rate 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.

**** Total revenues of 149 survey research companies that provide financial information on a confidential basis to the Council of American Survey Research Organizations (CASRO).



1

THE NIELSEN CO.
Nielsen.com

DAVID L. CALHOUN, 54

TITLE Chairman and CEO
EDUCATION B.S., accounting,
Virginia Polytechnic Institute

The Nielsen Co., formerly VNU Group N.V., based in New York and Haarlem, the Netherlands, was founded in 1923 and sold to a consortium of six private equity firms in 2006. In January 2011, the firm was listed on the New York Stock Exchange.

U.S. research-only revenue in 2010 was \$2,407.0 million, up 4.5% from 2009. In 2010, 51.1% of total research-only revenue, or \$2,551.0 million, was from outside the United States. The growth rate includes 2009 and 2010 revenue for The Cambridge Group Inc., acquired in May 2009, and excludes revenue for the acquisition of GlanceGuide Inc. in May 2010 and the sale of Nielsen EDI in December 2010.

Revenue is from Nielsen's Watch segment (media research) and its Buy segment (consumer research), which include some nonresearch businesses, mostly information services. Worldwide research and nonresearch revenue for Nielsen was \$5.1 billion in 2010.

Nielsen is a global information and measurement firm offering services in marketing and consumer information, TV and other media measurement, online intelligence, mobile measurement and trade shows.

Consumer Watch

Nielsen's Watch segment includes measurement and analytical services related to TV, online and mobile devices, and provides viewership data and analytics primarily to the media and advertising industries. Its media clients use the data to price their advertising inventory and maximize the value of their content, and its advertising clients use the data to plan and optimize their advertising spending and to better ensure that their ads reach the intended audiences. Nielsen provides measurement services across three screens: TV, online and mobile.

- **TV Audience Measurement Services:** In the United States, broadcasters and cable networks use Nielsen's TV audience ratings as the primary currency to establish the value of their air time, and to schedule and promote their programming. Advertisers use this information to plan TV advertising campaigns, evaluate the effectiveness of their commercial messages and negotiate advertising rates.

Nielsen provides two principal TV ratings services in the United States: measurement of national TV audiences and measurement of local TV audiences in all 210 designated local TV markets. It uses various methods to collect the data from households including electronic meters and written diaries. The methods collect not only TV viewing data, but also the demographics of the audience from which it calculates estimates of total TV viewership.

Nielsen's measurement techniques are constantly evolving to account for new TV viewing behavior, increased fragmentation and new media technologies. It created the "C3" ratings list, which is a measure of how many people watch programming and commercials during live and time-shifted viewing up to three days after a program airs.

The firm also provides TV audience measurement services in 29 countries outside the United States including Australia, Indonesia, Italy, Mexico and South Korea.

- **Online Audience Measurement Services:** Nielsen is a global provider of Internet media and market research, audience analytics and social media measurement of the behavior of online audiences for online publishers, Internet and media companies, marketers and retailers. The firm measures Internet surfing, online buying and video viewing (including TV content) of online audiences, providing advertising metrics such as audience demographics, page and ad views, and time spent, quantifying the effectiveness of advertising by reporting online behavioral observations, attitudinal changes and actual offline purchase activity. Nielsen measures and analyzes consumer-generated media including opinions, advice, peer-to-peer discussions and shared personal experiences on more than 100 million blogs, social networks, user groups and chat boards.
- **Mobile Measurement Services:** The firm provides consumer research and independent measurement for telecom and media companies in the mobile telecommunications industry, including mobile carriers and device manufacturers. In the United States, its metrics are a leading indicator for market share, customer satisfaction, device share, service quality, revenue share, content audience and other key performance indicators. Nielsen also benchmarks the end-to-end consumer experience to pinpoint problem areas in the service delivery chain, track key performance metrics for mobile devices and identify key market opportunities (e.g., demand tracking for device features and services). While mobile Internet consumption is still nascent, it is expanding quickly to capture Internet, video and other media on mobile devices worldwide.
- **Three-Screen Media Measurement:** The firm continues to develop advanced measurement techniques of the three principal screens: TV, online and mobile devices. In the United States, Nielsen is using a single-source TV and PC panel to deliver cross-screen insights. Its cross-screen measurement service provides information about the simultaneous use of more than one screen, as well as unduplicated reach, cause and effect analysis, and program viewing behavior. It also provides advertising effectiveness research across multiple platforms.

Consumer Buy

Nielsen's Buy segment provides retail transactional measurement data, consumer behavior information and analytics primarily to businesses in the consumer packaged goods industry. This segment is organized into two areas: Information, which provides retail scanner and consumer-panel-based measurement, and Insights, which provides a broad range of analytics. The measurement data is used as the method for measuring sales and market share in the CPG industry by tracking sales transactions in retail outlets around the world. Its database of retail and consumer information, combined with its analytical capabilities, helps generate strategic insights for business decisions.

- **Information: Retail Measurement Services:** Nielsen's purchasing data provides market share, competitive sales volumes, and insights into activities such as distribution, pricing, merchandising and promotion. Combining this information with in-house consultative services, it produces insights to improve marketing and sales decisions.

Nielsen collects retail sales information from stores using electronic point-of-sale technology and through teams of local field auditors. Stores within its worldwide retail network include grocery, drug, convenience and discount retailers that share their sales data. Electronic retail sales information is collected by stores through checkout scanners. In certain developing markets in which electronic retail sales information is unavailable, Nielsen collects information through in-store inventory and price checks conducted by more than 15,000 field auditors. The information is validated and then processed into client-specific databases that clients access using software to query the databases, conduct customized analyses, and generate reports and alerts.

- **Information: Consumer Panel Measurement:** This information offers insight into shopper behavior such as trial and repeat purchase for new products and likely substitutes, as well as customer segmentation. In addition, Nielsen's panel data augments its retail measurement information in circumstances in which it does not collect data from certain retailers.
 - The firm's consumer panels collect data from more than 250,000 household panelists across 25 countries who use in-home scanners to record purchases from each shopping trip. In the United States, approximately 100,000 selected households, constituting a demographically balanced sample, participate in the panels.
- **Insights: Analytical Services:** Using its foundation of consumer purchasing information, Nielsen provides a selection of consumer intelligence and analytical services. It draws insights from retail and consumer panel measurement data sets, online behavioral information and a variety of other proprietary data sets. For example, Nielsen maintains more than 2,500 demographic characteristics to describe households within each of the 8 million U.S. Census blocks to provide consumer segmentation and demographic insights.
 - The firm continually expands an existing database by conducting approximately 8 million surveys annually that capture consumer reaction to new product launches around the world. It also collects and analyzes more than 20 million surveys annually to measure consumer engagement and ad recall across TV and the Web to provide insights on advertising and content effectiveness.
- Its analytical services are organized into eight primary categories that follow clients' business development process: Growth and demand strategy, market structure and segmentation, brand and portfolio management, product innovation management and services, pricing and sales modeling, retail marketing strategies, marketing ROI strategies, and advertising engagement.
- **Insights: Advertiser Solutions:** Nielsen's Advertiser Solutions offering will integrate data from its Buy and Watch segments and use the analytical services noted above to provide end-to-end services directly to advertisers.

Nielsen's two research units employ an estimated 9,566 full time in the United States and about 33,200 worldwide. Nielsen's offices are located in 82 countries.



2

KANTAR
Kantar.com

ERIC SALAMA, 50

TITLE Chairman and CEO
EDUCATION M.Sc., Birkbeck College, London

Kantar, based in London and Fairfield, Conn., was founded in 1993 and is the Consumer Insights Division of WPP plc, a London-based public company.

U.S. research-only revenue in 2010 was estimated at \$914.7 million, up 7.5% from 2009. In 2010, 71.3% of total research-only revenue, or \$2,268.9 million, was estimated from outside the United States.

Kantar's research businesses in the United States work across the spectrum of research and consultancy disciplines, offering business insights at each point of the consumer cycle. The group's services are used by more than 300 of Fortune 500-ranked companies.

Following the 2008 acquisition of TNS, Kantar in the United States was restructured in February 2009 by merging Research International with the TNS Custom division and formed four new vertical divisions: Kantar Media, Kantar Health, Kantar Retail and Kantar Worldpanel.

The group now comprises the following research and nonresearch business units:

Added Value, Center Partners, IMRB International, Kantar Health, Kantar Japan, Kantar Media, Kantar Operations, Kantar Retail, Kantar Worldpanel, Lightspeed Research, Millward Brown, The Futures Co. and TNS (TNS/Research International in selected markets).

Kantar's worldwide services include the following in the United States:

Added Value

Added Value (Added-Value.com) focuses on brand development and marketing insight through its Brand Connections methodology, providing services in the areas of brand marketing, consumer insight, innovation and communications.

The firm's staff includes brand marketers with client-side experience, quantitative and qualitative specialists, semioticians, designers, psychologists, anthropologists and sociologists.

Its services include cultural trend analysis; portfolio strategy; market segmentation; mindset mapping and brand portfolio management for identifying market opportunities; brand positioning; ethnography and ideation; copy testing; tracking semiotic audits; and touch-point evaluation.

Kantar Health

Kantar Health (KantarHealth.com) incorporates the Ziment Group, Consumer Health Services, All Global, Mattson Jack Group and TNS Healthcare businesses, all of which specialize in healthcare primary research and consulting.

The group has four practice areas: treatment value, brand and stakeholder management, commercial development and marketing insights. It conducts a number of well-known branded studies on areas of consumer health including the National Health and Wellness Survey. It also has established three global consultancies in the areas of oncology, market access, and integrated marketing and media.

Kantar Health maintains panels of healthcare professionals who participate in Internet research. These panels include more than 160,000 physicians across Europe and North America, and a chronic illness panel with more than 350,000 patients in the United States and Europe covering 100 chronic illnesses.

Kantar Media

Kantar Media (KantarMedia.com), operating in more than 50 countries, offers a range of media insights and audience measurement services. In the U.S. market, Kantar Media includes Kantar Media Intelligence, CMAG, Marx, Kantar Media Audiences, Compete, Cymfony, SRDS, Professional Health and Mars.

It serves global advertisers, agencies and media companies by providing media and consumer research capabilities through its traditional, social and digital media monitoring offerings.

Kantar Retail

Kantar Retail (KantarRetail.com) consolidates the companies of Glendenning, Cannondale, Management Ventures Inc., Retail Forward and Red Dot Square. Its focus is on rolling out digitally delivered intelligence on retailers and extending shopper insights and consulting capabilities.

The firm has offices in 15 countries and across a wide range of sectors. Specialist areas include retailer insights and trends, organization development and virtual shopping insights. These areas are supported by products and services including Kantar Retail IQ, Shopcom, Shopper-Genetics, Kantar Retail PowerRanking and Richmix.

Kantar Worldpanel

Kantar Worldpanel (KantarWorldpanel.com) is a global provider of consumer panels that offer continuous measurement and analysis of consumer purchasing and usage behavior. The firm collects and analyzes data from samples of consumers using technology matched to the sophistication of local markets, including bar code and POS scanners, Internet, SMS text messaging and diary.

Operating in more than 50 countries, Worldpanel covers a spectrum of manufacturers, retailers and suppliers in consumer sectors including CPG, personal care and beauty, fashion, telecom, entertainment and automotive.

Lightspeed Research

Lightspeed Research (LightspeedResearch.com) has online and mobile panels with 3.5 million panelists in 24 countries. In July 2009, it merged with the TNS 6th Dimension panels operation.

The company provides market research services by building and maintaining panels and associated services including survey design consultation, sample management, programming, hosting and data collection. They range from proprietary online access panels to specialty panels, custom panels and mobile surveys.

These panels include automotive, B-to-B, beverage, family and household, financial, health and wellness, media consumption, mobile phone, beauty and personal care, sports and hobbies, and travel and leisure. Lightspeed also provides custom panel services to address specific client needs.

Through its own panels and its accredited panel partners, Lightspeed Research can provide access to more than 20 million panelists in 45 countries in Europe, North America and Asia Pacific.

Millward Brown Group

Millward Brown Group firms include Millward Brown, Firefly Millward Brown (previously Greenfield Consulting), MaPS, Dynamic Logic and The Focus Network.

Millward Brown (MillwardBrown.com) provides a full range of qualitative, quantitative and consulting services focusing on brands, marketing communications, media and marketing effectiveness. The company operates in 54 countries through 77 wholly owned or licensee offices.

Millward Brown works across a wide range of industries and categories, operating in areas such as brand strategy and experience; creative development and campaign evaluation; consumer needs and values; media planning and strategy; ROI, forecasting and investment management; brand valuation and analytics (through MB Optimor); and demand and activation.

Key products and services are Link copy testing, BrandDynamics, BrandZ, Dynamic Tracking, D&A, AdIndex and MB Precise.

Firefly Millward Brown (fireflymb.com) is a qualitative agency that conducts focus groups and in-depth interviews globally for Fortune 500-ranked companies.

Marketing and Planning Systems (MaPS) (MaPSnet.com) is a research company and consultancy that combines marketing science with consultancy skills.

Dynamic Logic (DynamicLogic.com) measures the impact of digital marketing initiatives and marketing effectiveness, and the role they play in the broader cross-media mix.

The Focus Network (TheFocusNetwork.com) is a network of focus group facilities.

TNS

TNS (TNSglobal.com) is a provider of both custom market research services and qualitative research services. It has offices in more than 80 countries.

TNS provides marketing knowledge and insights into consumers and markets. It has experience in most major sectors, particularly automotive, consumer, finance, technology, political and social. The firm's practice areas are: stakeholder management, brand and communications, product development and innovation, retail and shopper, qualitative, and digital.

TNS includes both custom approaches and proprietary techniques. Proprietary techniques include: 6dTV (interactive online research platform), AdEval (advertising evaluation), BPO (brand equity research), Conversion Model (commitment measurement), FutureView (identifies future shapers), Insightment (insight generation), Concept eValue (concept screening), Launch eValue (sales forecasting and launch optimization), Market ContactAudit (marketing communication effectiveness), Matrix (opportunity identification), Needscope (motivational research), Super Clinic (concept refinement), Super Group (ideation and concept development), Tri*M (stakeholder management), WebEval (website evaluation) and ValueManger (price and product optimization).

The Futures Co.

The Futures Company (TheFuturesCompany.com) monitors what influences consumer values and attitudes to identify current and future trends, and offers trends and futures consulting and future-facing qualitative and quantitative research. Its work covers the categories of brand, category, company, consumer and macro futures.

Kantar's U.S. businesses employ an estimated 4,135 research-only employees.



3

IMS HEALTH INC.
IMSHealth.com

ARI BOUSBIB, 48

TITLE Chairman and CEO
EDUCATION M.B.A., finance, Columbia University

IMS Health Inc. in Norwalk, Conn., was founded in 1954 and was a publicly traded company listed on the New York Stock Exchange. In February 2010, IMS was acquired by TPG Capital, the Canada Pension Plan Investment Board and several other investors.

U.S. revenue in 2010 was estimated at \$801.1 million, unchanged from 2009. In 2010, 63.8% of total revenue, or \$1,410.5 million, was generated outside the United States.

IMS is a leading provider of information services for the healthcare industry around the world. The firm brings together deep industry experience, innovative approaches and a global technology infrastructure to provide perspectives and in-depth analytics on market dynamics. With a presence in more than 100 countries, IMS offers services to pharmaceutical manufacturers, providers, payers, government agencies, policymakers, researchers and the financial community.

The firm provides services in healthcare analytics and services, healthcare measurement and consulting. Drawing on its capabilities in these areas, the firm helps in all segments to better understand the performance and value of medicines in increasingly efficient global healthcare markets.

IMS tracks more than 1 million healthcare products, covering more than 80% of all pharmaceutical sales transactions worldwide. It enables healthcare stakeholders to assess the linkages between patients, prescribers and payers. These insights into prescribing and treatment patterns play a central role in managing the quality and cost efficiency of healthcare.

IMS services help to develop commercialization plans and portfolio strategies, select the patient and physician populations that will derive the greatest clinical benefits from specific therapies, deliver information about new and innovative medicines to the right prescribers to enhance treatment decisions for patients, and allocate and measure the effectiveness of pharmaceutical marketing and sales resources.

IMS employs an estimated 1,560 full time in the United States.



4

SYMPHONYIRI GROUP INC.
SymphonyIRI.com

JOHN G. FREELAND, 57 (pictured)

TITLE President and CEO
EDUCATION M.B.A., Columbia University

ROMESH WADHWANI, 63

TITLE Chairman
EDUCATION: Ph.D., electrical engineering, Carnegie Mellon University

SymphonyIRI Group Inc. (SIRI), formerly IRI, based in Chicago, was founded in 1979 and became a public company in 1983. It was acquired in 2003 by Symphony Technology Group, a private company and is majority shareholder.

U.S. revenue in 2010 was \$457.0 million, up 2.4% from 2009. In 2010, 33.3% of total revenue, or \$240.0

million, was generated from outside the United States. The growth rate includes the 2009 and 2010 revenue of Hendry Corp., acquired in September 2009.

SIRI is a worldwide provider of consumer, shopper and retail market intelligence and insights for the CPG, retail and healthcare industries. It offers a combination of staff experience, predictive analytical models, information processing and business intelligence capabilities supported by technology platforms and integrated market information.

The firm offers the SIRI Partner Ecosystem that leverages the skill sets of its retail tracking and panel staff to provide "one answer" to business issues for more than 25 clients with regional and global agreements.

SIRI operates in 59 countries through stand-alone operations, wholly owned subsidiaries, partnerships and alliances. It operates under two interconnected business segments:

Market Measurement

SIRI Market Measurement provides CPG and retail market tracking information and insights via access and visualization tools. This information is used to analyze shopper activity and create new products, as well as for packaging, pricing, promotion and merchandising strategies.

- **InfoScan Tracking:** The census-based InfoScan point-of-sale (POS) tracking service provides access to detailed information on sales, share, distribution, pricing and promotion across a wide variety of retail channels and accounts.
- **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.
- **Industry Vertical Solutions** offers vertical experience and customized products and services for multiple industry verticals, including healthcare and wellness, center store, confections, beer, wine, spirits, bakery and dairy. These include:
 - **Healthcare Insights:** The firm's Healthcare Solutions Group provides pharmaceutical, healthcare and CPG companies and retailers with consumer intelligence, targeting and analytic services for the healthcare marketplace. It offers a complete suite of retail tracking, consumer panel and analytics-driven products and services under the RxPulse brand.

- **Beverage Alcohol Industry Insights:** SIRI provides 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, providing manufacturers and distributors with retail sales trends, and purchase behavior and consumer insights in grocery, drug, mass merchandise, convenience, liquor and club stores.

Symphony Solutions & Services

Symphony Consumer & Shopper Marketing offers CPG and retailers a range of services focusing on delivering consumer and shopper insights, test marketing services, digital media services, shopper segmentation and targeting, and shopper marketing services. These services are delivered on the SIRI Liquid Data technology platform and supported by experienced teams. SIRI's Consumer & Shopper Marketing capabilities include market structure and consulting, brand and retailer loyalty analyses, attitudinal segmentations and individual user profiles. Many of these services are powered by its Liquid Data platform.

The firm continued to expand its Consumer and Shopper Insights platforms through the launch of a series of new digital media services that integrates SIRI's

Consumer Network (panel) purchase data, predictive modeling techniques and analytical experience with a number of online research and advertising capabilities through a series of partnerships to provide consumer insights, segmentation, targeting and campaign-specific, return-on-investment (ROI) analysis capabilities for online advertisers. These services are used by CPG, retail and healthcare companies to identify high-potential consumers online to target their digital media campaigns and evaluate the actual sales impact of those programs.

Symphony Advantage

Symphony Advantage is a suite of business intelligence software services for trade management, merchandizing, shopper marketing and in-store execution powered by the Liquid Data technology platform. It is delivered by an Advantage Portfolio of business applications that include:

- **Brand Advantage** is a user-friendly online media planning and analytical application that is delivered over the Web. It recommends optimal marketing spending and gives users the ability to overlay business requirements to drive incremental marketing ROI. It analyzes, plans, assesses and adjusts marketing dollars and uses diagnostic reporting to compare alternative scenarios and determine the best media mix.
- **Shopper Insights Advantage** provides insights into shopper behavior combining content, such as built-in scorecards and best-practice analysis templates, with the speed and flexibility to identify opportunities to attract shoppers, drive trips and increase basket value.
- **Sales Advantage** uses total store data for sales forces to create insight into strategy, retailer performance and overall go-to-market behavior through the lens of retail partners, competitors and consumers. Results are driven by automated workflows, scorecards and best practices that are customized to specific needs and supported by SIRI's consulting services and change management experience.
- **Total Store Advantage** includes an integrated database of all edibles and non-edibles in the CPG industry, organized by department, aisle and category.
- **Price & Trade Advantage** gives insight on price sensitivities, gaps, thresholds, competitive implications and sales volume decomposition to maximize sales and create the most effective pricing and trade plans at retail.
- **Loyalty Advantage** leverages transactional and loyalty data to drive retail decision-making through a collaborative analytical process with vendor partners.

Symphony Analytics

Symphony Analytics provides a combination of predictive analytical techniques, proprietary rapid-modeling platforms, automated services and experienced analytics consulting talent. It focuses on the strategic and operational needs in sales and category management, marketing and brand management, strategy and demand planning.

Symphony Consulting

In 2010, SIRI continued the expansion of its Consulting and Innovation Practice and its commitment to delivering consulting and strategic advisory services. Symphony Consulting offers advisory services in sales and marketing for C-level management within the CPG and retail industries. The group focuses on four key practice areas: strategic pricing, growth and innovation, shopper marketing, and customer and channel management. Symphony Consulting is composed of experienced

consultants from top-tier strategy consulting firms who have successfully completed hundreds of engagements focused on developing long-term strategic and collaborative relationships.

SIRI has 1,198 full-time employees in the United States and 3,600 worldwide. It has offices throughout the United States and in the United Kingdom, France, the Netherlands, Germany, Greece, Italy and Spain.



5

WESTAT INC.
Westat.com

JOSEPH A. HUNT, 75

TITLE President and CEO
EDUCATION M.S., Massachusetts
Institute of Technology

Hunt was succeeded in May 2011 by James E. Smith after serving as president for 32 years.

Westat Inc. in Rockville, Md., is an employee-owned company founded in 1963.

U.S. revenue in 2009 was \$455.3 million, down 9.4% from 2008.

Westat combines a reputation for high-quality surveys with a constant effort to innovate and build new capabilities. Its corporate capabilities include statistical design and analysis, research methodology, survey operations, scientific and clinical research, program evaluation, systems development, and other survey and information services. The firm's professional staff has significant experience in a broad range of subject and program areas, including health and medical studies, education, social services, transportation and environmental protection, among others.

The firm's clients are the agencies of the U.S. government, as well as businesses, foundations, and state and local governments. Its projects serve a broad range of needs: assessing students' educational achievement, understanding health and environmental risks, gaining new knowledge of the causes of disease, evaluating the performance of social programs, and supporting the development of policy and regulations in many areas of government. Westat also performs clinical trials work for the U.S. government and for pharmaceutical and biotechnology clients, both domestically and through its international operations.

In addition, Westat continues to expand its methods research and information dissemination capabilities. The firm operates a behavioral research facility specializing in Web usability studies, augmenting its cognitive laboratory and focus group capabilities. It also manages websites and call centers supporting federal agencies' public information programs.

Westat surveys are increasingly multimodal. In its projects, it conducts survey operations through telephone research centers across the United States, a national network of home-based telephone interviewers, and a nationwide staff of field data collectors for in-person and institutional data collection. To support and manage these large, distributed, computer-assisted interviewing operations, Westat maintains an extensive, secure, nationwide computer and communications infrastructure.

The firm distributes and provides user training and support for Blaise, a commercial off-the-shelf software system for computer-assisted telephone interviewing and complex survey processing. Blaise was developed by Statistics Netherlands and is used internationally. In 2010, Westat supplemented its WesVar statistical processing software with a user-friendly WesDaX module to perform online data analysis and tabulations.

Westat has a staff of 1,964 professional full-time employees. In addition, its telephone interviewing, field interviewing and data editing staff averaged about 1,200 during 2010. It also maintains research offices in Bethesda, Md., Raleigh, N.C., Atlanta, Houston and Philadelphia, and in five international locations.



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6

ARBITRON INC.
Arbitron.com

WILLIAM T. KERR, 70

TITLE President and CEO

EDUCATION M.B.A., Harvard Business School

Arbitron Inc., based in Columbia, Md., was founded in 1949 and in 2001 became a public company listed on the New York Stock Exchange.

U.S. revenue in 2010 was \$390.4 million, up 2.8% from 2009. In 2010, 1.3% of total revenue, or \$5.0 million, came from outside the United States. The growth rate excludes 2009 and 2010 revenue from the acquisition of Integrated Media Measurement Inc. in June 2010.

Arbitron is a leading media and marketing research firm primarily serving radio, cable and TV broadcasters, advertising agencies, advertisers, buying services, retailers, out-of-home media, online media and print media.

Arbitron's four main services are measuring radio audiences in local markets across the United States; measuring network and national radio audiences in the United States; providing consumer shopping and media usage information to radio, cable, advertising agencies, advertisers, retailers, broadcast TV, out-of-home media, newspapers and online media; and providing application software used for analyzing media audience and marketing information.

Media Services

- **Measuring Local Market U.S. Radio Audiences:** Arbitron measures the size and composition of radio station audiences by periodically surveying radio listeners in approximately 280 U.S. markets. It has commercialized the Portable People Meter (PPM) ratings service in the top 48 U.S. radio markets.
- **Measuring National U.S. Radio Audiences:** Arbitron also provides measurement of network radio audiences through its two national ratings services: RADAR and Nationwide. The RADAR service provides a measurement of national radio audiences and the audience size of network radio programs and commercials for more than 55 separate radio networks.

Radio Nationwide is a source for local and regional market network ratings. The service, issued twice each year, is based on the firm's fall and spring surveys.:

- **Surveying Consumers in Local Markets:** In addition to its radio ratings service, Arbitron also provides consumer profiles of radio listeners, broadcast and cable TV viewers, newspaper readers and consumers reached by outdoor and out-of-home advertising displays. These profiles contain detailed socioeconomic data and information about what consumers buy, where they shop and what other forms of media they use. Arbitron provides measurements in approximately 270 local markets in the United States through the Scarborough service and two other services that conduct ongoing consumer surveys.
- **Providing Application Software:** The firm also provides software applications that give access to media and consumer information from Arbitron and other research providers. The software assists in making media buying and selling decisions, and in managing and programming radio stations.

Portable People Meter System

Arbitron is evolving its data collection business from diaries to portable electronic measurement devices that passively provide measurement services without additional manual effort by the survey participants.

The PPM technology is capable of measuring audiences for programming and advertising purposes across multiple media including, among others, broadcast and satellite radio; broadcast, cable and satellite TV; the Internet; and retail in-store audio and video broadcasts. During 2010, Arbitron commercialized its PPM ratings service in 48 of the largest United States radio markets.

In June 2010, Arbitron announced its PPM 360 device, a new generation of audience ratings technology that uses wireless cellular technology to transmit media exposure data without the need for panelists to dock the PPM device in a base station, which it intends to gradually introduce to its PPM panels.

Cross-Platform Media Measurement

Arbitron is developing cross-platform services that focus on the consumer, whether in his home or away from home. Based on its PPM system, which is capable of measuring audiences for programming and advertising purposes across multiple media, broadcasters, content providers and advertisers would receive a more complete

picture of their audience and a comprehensive measure of advertising impressions.

Arbitron provided cross-platform audience ratings services to NBC Sports, a division of NBC Universal Inc., together with online marketing research and analytics companies comScore Inc. and Omniture, for the Vancouver 2010 Olympic Winter Games. And the firm is currently collaborating with Turner Broadcasting Systems Inc. for measuring the out-of-home, in-home and combined viewing of certain programming.

In February 2011, the Center for Innovative Media Measurement announced that it would work with Arbitron on a pilot test to measure consumer behavior with content and advertising across television, the Internet and mobile devices.

The firm has five regional sales offices located in the metropolitan areas of New York, Atlanta, Chicago, Dallas and Los Angeles. It has operations offices in Dallas, Birmingham, Ala., and Kochi, India. Its survey research, technology, and data collection and production operations are located in its Columbia, Md., facilities.

Arbitron has 951 full-time and 330 part-time employees in the United States.



7

IPSOS
Ipsos-NA.com

JAMES T. SMITH, 59

TITLE Chairman and CEO

EDUCATION M.B.A., Cornell University

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.

U.S. revenue in 2010 was \$379.6 million, up 9.0% from 2009. In 2010, \$1,133.2 million, or 74.9%, of total revenue, was from outside the United States. The growth rate excludes 2009 and 2010 revenue from the acquisition of OTX Corp. in March 2010. Revenue in 2010 for Ipsos in North America was \$484 million and for Ipsos Group SA was \$1.5 billion.

Ipsos is a global survey-based market research firm providing services in six areas of specialization: advertising research, marketing research, media research, loyalty

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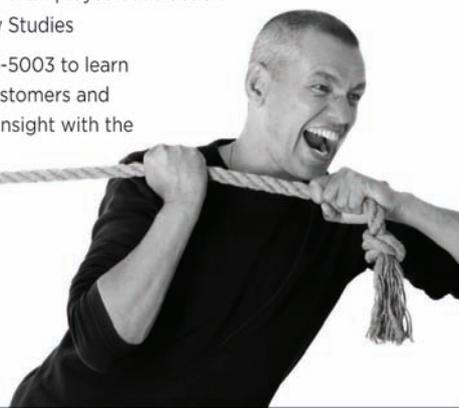
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CBC - Choice-Based Conjoint - Most popular conjoint method today. Choices mimic buyer decisions. Often used for pricing research.

ACA - Adaptive Conjoint Analysis - Computer interview customizes experience for respondent. Especially useful with many attributes.

CVA - Conjoint Value Analysis - Traditional full-profile conjoint method. For few attributes and single-version design plans.

MaxDiff - Maximum Difference Scaling - (Best-Worst Measurement) for measuring the importance or preference for multiple items (brands, features, ad claims, job-related factors, etc.).

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research, public affairs research and survey management. The firm has a full line of custom, syndicated, omnibus, panel and online research products and services guided by experienced industry staff and supported by analytics and methods.

Ipsos' six areas of specialization are represented by the following firms across North America:

- Ipsos ASI (Ipsos-NA.com/advertising) is a world-wide 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. It helps in the development, evaluation and improvement of advertising efforts.
- Ipsos Loyalty (Ipsos-NA.com/loyalty) is a global, specialized practice in customer satisfaction management, customer relationship management and employee climate management, and is supported by a modular suite of integrated research tools. In Canada, this practice operates as Ipsos Reid.
- Ipsos Marketing (Ipsos-NA.com/marketing) operates under a global structure and is supported by experienced special teams that provide integrated qualitative and quantitative research services, as well as modeling and forecasting techniques that include simulations and linkages to in-market data. In Canada, this group operates as Ipsos Reid.
- Ipsos OTX MediaCT (Ipsos-NA.com/media) is a market research specialization that helps clients reach, engage and effectively understand digitally driven consumers. It integrates new technologies and immersive techniques with extensive traditional research experience to understand media and technology consumption, evaluate content, monitor the value of brands and provide guidance for successful innovation.
- Ipsos Public Affairs (Ipsos-NA.com/pa) specializes in corporate reputation, issues management, strategic communications and sociopolitical trends, serving 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 Observer (Ipsos-NA.com/observer) is the firm's survey management, data collection and data delivery specialization serving client researchers who have the means to analyze data in-house. From creating surveys to delivering data, its team of market research professionals manages projects across a broad range of online and offline research methodologies including, online, telephone, face-to-face and mobile.

Ipsos employs 1,246 in the United States.

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8

GfK USA
GfKamerica.com

KLAUS L. WÜBBENHORST, 55

TITLE CEO of GfK SE
EDUCATION Ph.D., Technical University,
Darmstadt, Germany

GfK USA comprises the U.S. operations of GfK SE, a public company based in Nuremberg, Germany, which was established in 1934 and is listed on the Frankfurt Stock Exchange.

U.S. revenue in 2010 was \$290.9 million, up 0.6% from 2009. In 2010, 83.5% of total worldwide revenue, or \$1,471.1 million, was from outside the United States. The growth rate excludes the 2009 and 2010 revenue of Inter-scope acquired in November 2010.

GfK SE is a worldwide market research organization offering information on the media messages that people perceive, the beliefs that they hold, and the products and services that they buy. GfK is creating new methodologies and technologies to provide powerful insights and the most complete view of the way people live, on and offline.

The firm provides services in three sectors: custom research, retail and technology, and media.

Custom Research

This sector provides research services in key industrial sectors and markets using both qualitative and quantitative research methods, employing both online and offline techniques and advanced technologies. Key market areas are B-to-C, B-to-B and medical professionals.

- GfK Custom Research North America (GfKamerica.com), headquartered in New York, 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 & Communications, and GfK Business & Technology (includes industrial and B-to-B research). Key specialty practice areas include GfK Brand & Communications, GfK Customer Loyalty (includes GfK Mystery Shopping), GfK Roper Consulting (consumer trends), GfK Roper Public Affairs, GfK Corporate Communications (includes GfK Roper Omnibus Services), GfK Strategic Innovation, GfK Qualitative & Ethnography, and GfK Interscope (shopper marketing).

The firm's newly formed GfK Corporate Innovation team includes GfK's Research Center for Excellence (RCfE) and a Corporate Innovation function. The RCfE ensures that the firm continues to drive marketing science and data visualization services into client engagements and the company's product portfolio. The Corporate Innovation team focuses on basic and applied research, the development and commercialization of new products for the firm's portfolio, and enhancements to its current product line. GfK also delivers research support and data collection services through Friedman Marketing Services and GfK Research Dynamics in Canada.

- GfK Healthcare (GfKHC.com) is a major provider of fully integrated custom healthcare marketing research worldwide. With a broad range of custom and multi-client research offerings, as well as innovative approaches to meet a product's needs across its life cycle, GfK Healthcare offers flexible marketing research resources. It has more than 40 years of experience in healthcare-specific marketing research across both local and global projects, encompassing virtually all qualitative and quantitative methodologies and including in-depth experience across more than 60 therapeutic classes.
- GfK Kynetec (GfK-Kynetec.com) is a global provider in full-service marketing research and consulting services to the agricultural, animal health and dental lab industries.

Retail and Technology

Information on retail sales of technical consumer goods is gathered on a continuous basis in this sector, sourced from retailers.

- Etilize (Etilize.com) is one of the largest providers of aggregated product data in the world. It provides product content in categories such as IT, consumer electronics, automatic identification and data capture (AIDC), sporting goods, professional photography, home and garden equipment, appliances and office products. The firm collects information from thousands of global manufacturers, creates a standard taxonomy and delivers the finished product as e-commerce-ready Web content to online retailers, distributors and resellers.
- GfK Audits and Surveys USA (GfKAuditsAndSurveys.com) 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 sales tracking programs covering pet food and optical products such as contact lenses, eyeglass lenses and frames. It tracks dispensing data through professional channels that offer products directly to their clients such as veterinarians, optometrists, opticians, etc.
- GfK Equity Research (GfKEquityResearch.com) and GfK Boutique Research (GfKBoutiqueResearch.com) divisions analyze GfK data in the context of external data sources, including government data (GDP, import/export, confidence), financial data (foreign exchange, profits) and figures released by industry (sales guidance, factory shipments, supply chain data points). Its services aid those seeking to understand today's figures and forecast tomorrow's developments, including electronics suppliers, gadget manufacturers, distributors, retailers, network operators and investors.
- IFR Monitoring USA (IFRmonitoring.com) is experienced in retail in-store shelf analysis, retail print advertising and Internet advertising analysis. It analyzes shelf share, ad share and Internet share to present a complete picture in the "eyes of the consumer" at the various levels of retail shelves, retail advertisements and retail online sites, reflecting the market offers, placements and promotions.

Media

This sector delivers continuous customized research on the reach, intensity and use of TV, radio, print and online media.

GfK MRI (GfKMRI.com) is a provider of media and consumer research in the United States and is the primary source of audience data for the American magazine industry. Data from MRI's Survey of the American Consumer, conducted continuously since 1979, are used in the majority of media and marketing plans written in the United States. Its measurement of all major media audiences makes it the largest source available for integrated media planning. In 2009, the firm launched AdMeasure, the industry's first print ad ratings service.

Operating in more than 100 countries, GfK has 877 full-time employees in the United States.

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9

SYNOVATE
Synovate.com

SCOTT MILLER, 46

TITLE CEO of Synovate North America
EDUCATION B.A., political science, Albion College

Synovate, based in London, was created in 2003 and is the market research arm of Aegis Group plc, a London-based public company listed on the London Stock Exchange.

U.S. revenue in 2010 was \$235.8 million, up 9.9% from 2009. In 2010, revenue from outside the United States was \$649.0 million, or 73.3% of total revenue.

Synovate is a global market research firm that generates consumer insights by providing integrated research metrics and ensuring that those metrics are more predictive of business outcomes. The firm is based around a borderless organization with a personalized service and flexible structure that allows it to create teams and processes that meet client-specific requirements.

Its clients range from Fortune Global 500 companies to entrepreneurial start-ups and come from all sectors of business: consumer packaged goods, healthcare,

automotive, financial services, petrochemicals, media and advertising, government, retail, restaurants, technology, telecom and more.

Synovate's global capabilities include:

- **Brand & Communications:** The firm offers Brand Value Creator, Market Barriers, BrandLife and other services to grow brands, assess obstacles and track the impact of communications on performance. Synovate's brand research also can be integrated with its customer loyalty and shopper research capabilities, providing a holistic view of customers.
- **Customer Experience:** This global practice measures, models and manages customer experience, satisfaction and loyalty.
- **MarketQuest:** This service guides clients through the entire product development process, from initial concept to pricing and packaging, as well as ongoing performance monitoring to ensure effective market decisions and accurate volume estimates.
- **Shopper Insights:** Synovate Shopper Insights identifies key category and brand shoppers, understands and quantifies positive and negative in-store factors impacting brand and channel performance, and optimizes the shelf to maximize retail performance. Equipment allows retailers to count, track and study shopper behavior in stores during all times of the day to assess the impact of promotions, displays, store locations, layouts and other factors.
- **Syndicated Services:** Synovate's syndicated studies include PAX and EMS, which examine media behavior and product ownership among affluent consumers; Media Atlas, which covers media consumption, product ownership, brand relationship, and lifestyles and attitudes among general consumers in key Asian markets; Young Asians, which examines youth behavior across 12 Asian markets; Mail Monitor, which tracks direct mail credit card offers in the U.S. market;

Customer Satisfaction Index (CSI), which tracks Canadians' satisfaction with their financial institutions; Dura-Trend, which tracks Americans' purchases of household durable goods; and Household Equipment Canada (HEC), which tracks durable purchases in Canada.

Synovate currently has offices in 64 countries with the ability to conduct market research in an additional 75. The firm employs 762 full time in the United States.



10

THE NPD GROUP INC.
NPD.com

TOD JOHNSON, 66 (pictured)

TITLE Chairman and CEO
EDUCATION M.S.I.A., Carnegie Mellon University

KARYN SCHOENBART

TITLE President and COO

TOM LYNCH

TITLE CFO and COO

The NPD Group Inc. (NPD), based in Port Washington, N.Y., is a privately held corporation founded in 1967.

U.S. revenue in 2010 was \$173.7 million, up 4.8% from 2009. In 2010, 27.7% of total revenue, or \$66.4 million, was generated from work conducted outside the United States. The growth rate excludes the 2009 and 2010 revenue from the acquisitions of Solarbuzz in March 2010 and LGI Network in May 2010.

NPD provides consumer and retail information for a wide range of industries, including manufacturers, retailers, financial services companies and others. The firm helps identify new business opportunities and guides product development, marketing, sales, merchandising and other functions.

Information is available for the following industry sectors: audio/video/imaging, automotive, beauty, commercial technology, displays, entertainment, fashion, financial services, foodservice, government, home, IT/printing, kids, office supplies, retailing, software, solar, sports, telecom, toys and video games.

The firm's products and services include retail tracking, consumer tracking, shipment tracking, special reports, custom services, analytics and analyst businesses.

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NPD's national retail tracking services are based on point-of-sale store movement information collected from 950 retail partners representing about 165,000 doors worldwide. It also offers market- and store-level tracking and advanced analytics at various geography levels, including designated market areas, census regions and custom areas such as client retail trading areas in the United States and Europe. The firm monitors commercial sales of information technology products through an alliance with the Global Technology Distribution Council, whose members constitute approximately 80% of the IT distributor market.

NPD's consumer tracking services in the United States are based on information collected from the NPD Online Panel of nearly 2 million registered members, optimized for tracking studies.

The firm's Technology Analyst Business provides market research on the flat panel display supply chain, as well as the emerging photovoltaic/solar cell industries. It provides trend information, forecasts and analyses developed by a global team of experienced analysts with extensive industry knowledge and resources.

In 2011, NPD will continue to build its analyst businesses with the acquisition of In-Stat and a new line of products called Connected Intelligence. It will introduce new consumer tracking services providing more robust shopper insights in several industries, including fashion and consumer technology. The firm will continue to extend its global reach, exploring new business opportunities around the world.

NPD's joint ventures include a series of companies owned by NPD and GfK SE, operating retail tracking services in Europe, the Americas, Asia and Australia for consumer electronics, household durables, cameras, and information and IT. NPD partners with GfK in OzToys, a retail tracking service covering toys, video games and software in Australia and New Zealand.

The firm, which has offices in 25 cities around the world, has 815 full-time U.S. employees. Outside of the United States, it has 320 full-time employees.



11

**ICF INTERNATIONAL
INC.**
ICFI.com

SUDHAKAR KESAVAN, 56

TITLE CEO

EDUCATION M.S., technology and policy, Massachusetts Institute of Technology

ICF International Inc. (ICF), based in Fairfax, Va., was founded in 1966 and was listed on the Nasdaq stock market in 2006.

U.S. research-only revenue for 2010 was \$153.2 million, up 8.0% from 2009. In 2010, 23.4% of total research-only revenue, or \$46.9 million, was from outside the United States. The growth rate includes 2009 and 2010 revenue from the acquisition of Marco International in April 2009 from infoGroup Inc. U.S. research and nonresearch revenue is \$619 million for 2010.

ICF provides survey research services to U.S. government agencies as well as international organizations and multinational corporations. The firm serves aviation, climate, community development, defense, education, energy, environment, families and communities, health, homeland security and transportation markets.

The firm's products and services are in seven areas of specialization:

- International Research and Evaluation: ICF provides training and technical assistance to assist national governments, in-country organizations and international donor agencies with developing indicators and metrics, monitoring and data collection, policy formation and disseminating findings to target audiences.
- Experimental and Quasi-Experimental Research: The firm addresses the full life cycle of experimental and

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quasi-experimental research services, including methodology and study design, quantitative and qualitative data analysis, database and systems development, and reports and the publication of results.

- **Monitoring and Evaluation Capacity Building:** ICF builds program monitoring and evaluation capacity with services, including managing change and communicating developments to grantees or awardees, adjusting data collection systems or indicators to reflect program changes, producing report snapshots to show continued progress, and leveraging existing resources to expand capacity in monitoring and evaluation.
- **Performance Measurement:** The firm's life cycle approach supports U.S. federal agencies, nonprofits and commercial firms with performance measurement tools and techniques, including: developing meaningful and measurable indicators, creating dashboards and balanced scorecards, setting targets and goals for continuous quality improvement programs, and designing and implementing Web-based data management and reporting systems.
- **Program Evaluation:** ICF applies traditional and analytic methods and tools including randomized control trials, propensity score matching, quantitative analysis of designs, ethnographic studies and social network analysis.

- **Quantitative Methods and Analysis:** ICF provides a range of quantitative methods and analysis, including: Web, telephone, paper and mail, in-person and hybrid surveys; cell phone data collection; sampling and weighting; database development and data management; proprietary modeling of complex systems and analytic methods; and cost benefit analysis.
- **R&E Surveys and Analysis:** The firm's surveys incorporate emerging methodologies and generate strong, defensible response rates. Services include questionnaire and manual development, quality control, FISMA-moderate data security capacity, software development, and the analysis and dissemination of findings

ICF has 38 full-service offices in the United States and current projects in seven countries. Its full-time U.S. staff is 1,000.



12

J.D. POWER AND ASSOCIATES
JDPower.com

FINBARR O'NEILL, 58

TITLE President

EDUCATION J.D., Fordham University Law School

J.D. Power and Associates (JDPA) in Westlake Village, Calif., was founded in 1968. In April 2005, it was acquired by The McGraw-Hill Cos., New York.

U.S. research-only revenue in 2010 was estimated at \$147.3 million, down 10.4% from 2009. Revenue from outside the United States in 2010 was estimated at \$84.1 million, or 36.2% of total research-only estimated revenue.

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 industry-wide and client-commissioned research, B-to-B consulting, automotive forecasting and media research.

Annual syndicated studies are based on survey responses from millions of consumers and business customers 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 used the services being rated.

JDPA is best known for its work in the automotive industry, for which its metrics have become the industry standard for measuring 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, healthcare, utilities and consumer electronics.

The firm's clients include many Fortune 500 companies in the United States and many internationally. JDPA has seven U.S. offices and locations in eight countries. In the United States, it has 459 full-time employees.



13

COMSCORE INC.
comScore.com

GIAN M. FULGONI, 63 (pictured)

TITLE Chairman
EDUCATION M.S., marketing, University of Lancaster, United Kingdom

MAGID ABRAHAM

TITLE President and CEO

ComScore Inc. (cS), based in Reston, Va., was founded in 1999 and was listed on Nasdaq in June 2007.

U.S. revenue for 2010 was \$142.0 million, up 14.8% from 2009. In 2010, revenue generated outside the United States was \$33.0 million, or 18.9% of total revenue. The growth rate excludes 2009 and 2010 revenue from the acquisitions of ARSgroup in February 2010, and the Products Division of Nexius Solutions Inc. in July 2010.

cS continuously measures the digital behavior of a global cross section of 2 million Internet users (including 1 million in the United States) who provide their browsing and transaction behavior, including online and offline purchasing. Its panelists also participate in survey research that captures their attitudes, lifestyles, product preferences and purchase intentions, which can be integrated with their observed online behavior.

cS services fall into three primary segments of digital analytics: User Analytics, Advertising Analytics and Mobile Analytics.

User Analytics

- comScore Media Matrix (CMM) provides 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 40 countries.

Its syndicated measurement is based on the Unified Digital Measurement methodology, which combines both panel-based and website-census measurement. The methodology, which requires publishers to use a comScore census tag on their website, has been adopted by more than 90% of the top 100 U.S. media properties.

cS offers tools for reach and frequency analysis, day-part planning, online and offline local market analysis, and emerging applications. Other services in the CMM suite include comScore Video Metrix, for measurement of online video viewing; qSearch, for measurement of search behavior; comScore Ad Metrix, for measurement of online display advertising; Segment Metrix, which describes the online behavior of various consumer segments, including those defined by Prizm and PersoniX; and comScore Marketer, a search marketing intelligence tool.

- comScore Marketing Solutions (CMS) combines the cS Internet user database with the experience of comScore analysts to deliver insight into the online

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behavior of consumers for clients in the automotive, consumer packaged goods, entertainment, financial services, media, pharmaceutical, retail, technology, telecommunications and travel industries.

CMS also integrates online behavior with offline purchase and product ownership data. cS matches its online database with offline buying databases (such as a retailer's loyalty card database) to create large datamarts that allow measurement of the impact that online marketing has on offline buying behavior. In conjunction with SymphonyIRI's Consumer Network panel, cS also has the capability to measure the impact of online marketing campaigns across retail channels.

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 also 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 any online category; benchmarking and opportunity gap/SWOT analysis; customer profiling and segmentation models; the 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 the scoring of customer files for direct marketing programs using markers and propensities derived in aggregate within the cS database and applied using shared attributes.

The firm also recently announced the launch of Digital Analytix, an analytics service that features the integration of user demographic data, as well as an agile and flexible data architecture.

Advertising Analytics

cS offers several services under the Advertising Analytics umbrella, including advertising planning tools, advertising effectiveness measurement and advertising copy testing.

This service provides understanding audiences and verification that a campaign actually reached its intended target, and also quantifies the impact of multimedia advertising on attitudes and behaviors as well as on online and in-store sales. The suite of products for both digital and cross-media campaigns allows for in-flight optimization and overall improved campaign ROI.

It also includes a variety of optimization tools designed to provide a predictive evaluation of an ad's creative quality. Using insights provided via copy testing, clients are able to test and monitor creative strategies, executions and campaigns across a variety of individual media as well as multiple touchpoints, delivering a holistic view of an ad's likely and actual impact.

Mobile Analytics

cS uses both passive on-device measurement and surveys of mobile users, and works with handset manufacturers and network operators worldwide.

The services currently offered under cS's Mobile Analytics umbrella include: MobiLens, a mobile market intelligence service that connects consumers' use of mobile devices, content merchandising, and the capabilities and characteristics of the devices; Mobile Metrix, passive measurement of mobile Web browsing using cS's patented software application residing on mobile devices; Ad Metrix Mobile, tracking of mobile Internet display advertising; and GSMA Mobile Media Metrics, anonymized census-level reporting of mobile media behavior in the United Kingdom. The Nexius Xplore product suite provides mobile analytics for carriers in order to help them analyze and optimize their network and customer service experience.

In 2010, cS acquired ARSgroup, a communications research agency specializing in the measurement of advertising persuasion for TV and multimedia campaigns, and Nexius Products Division, a family of products that provides analytics that mobile operators use internally to build smarter networks and improve customer care.

cS has 673 full-time employees in the United States, with offices in six U.S. cities and in 16 countries worldwide.



14

MARITZ RESEARCH
MaritzResearch.com

MICHAEL BRERETON, 51

TITLE President
EDUCATION M.B.A., Bowling Green State University

Maritz Research, based in Fenton, Mo., was founded in 1973 and is a wholly owned subsidiary of Maritz Holdings Inc.

U.S. revenue in 2010 was \$140.9 million, up 8.6% from 2010. In 2010, 13.1% of total revenue, or \$21.2 million, came from outside the United States. The growth rate excludes 2009 revenue from the sale of the Pharmaceutical Research Group in June 2009. Maritz Holdings' revenue in 2010 was \$1.2 billion.

Maritz Research provides services that improve performance by understanding the integrated dynamics between customers, employees and channel partners. The firm's specialized divisions focus on the automotive, financial services, hospitality, technology and retail sectors.

The firm designs, launches and operates customer experience intelligence programs related to the customer voice. Its approach allows better listening to and acting upon whatever customers say, wherever they say it.

Customer voice is further understood through the integration of multiple voice-of-the-customer (VOC) sources by tying insights to business outcomes and by distilling findings to core messages that drive meaningful customer experience improvements.

Maritz Research will continue its investment in VOC by developing methods of collecting feedback, integrating VOC sources, including social media and refining its reporting approach to better communicate feedback-driven action in 2011.

The firm's research findings can be acted on through the other Maritz businesses. These businesses combine to offer synergy to develop loyalty and motivation programs that deliver brand-enhancing customer experiences.

Maritz Research employs 612 people full time in the United States and 743 worldwide. Its offices are located in Chicago; Detroit; Hamburg, Germany; Kansas City, Mo.; Kirksville, Mo.; Los Angeles; Marlow, U.K.; Minneapolis; Shanghai, China; St. Louis; and Toledo, Ohio; and in Toronto, Montreal and Saskatoon, Canada.



15

DUNNHUMBYUSA
dunnhumby.com/us/

STUART AITKEN, 39

TITLE CEO
EDUCATION M.S., information management science, University of Strathclyde, Glasgow

dunnhumbyUSA in Cincinnati was founded in 2003 by joint owners The Kroger Co. in Cincinnati and dunnhumby Ltd. in London, which is majority-owned by Tesco plc.

U.S. research-only revenue in 2010 was \$110.7 million, up 26.7% from 2009. In 2010, 43.2% of total research-only revenue, or \$84.3 million, was from work

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conducted outside the United States. Total research and nonresearch revenue was \$245 million.

dunnhumbyUSA combines attitudinal insights with behavioral insights to deliver a complete view of the customer for both retailers and manufacturers. It identifies customers who have behaved in a certain way and connects with them to understand the underlying attitudes that caused this behavior. Knowing the “why behind the what” creates a multidimensional understand-

ing of the customer and enables companies to make more informed and effective business decisions. Companies can find out when and how their brands and products are consumed, and what needs they fulfill; the appropriate focus of media campaigns and messages; consumers’ motivations to buy and the barriers to purchase; and the likely success of new product ideas.

The firm’s source of information is customer transactional data from retailers’ customer loyalty (frequent

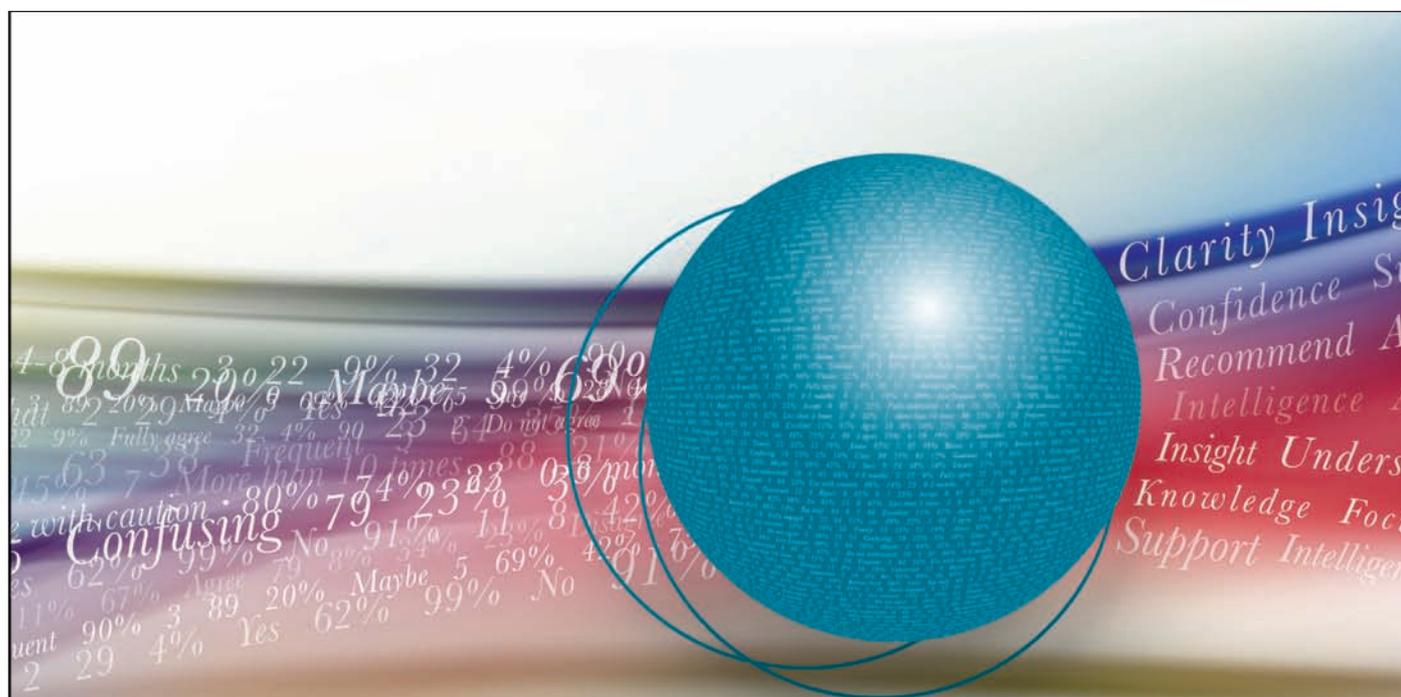
shopper) programs, POS sales and traditional market research methods, reflecting what shoppers actually do in terms of what, how and why they buy, targeting customers who matter most and identifying where the biggest opportunities lie.

The firm uses an algorithm, called the “rolling ball,” to read customers’ lifestyles by analyzing their shopping choices. It identifies patterns in the basket bundles and uses these to sort customers into various lifestyle and life-stage categories based on the products they buy. This “DNA” profile is built up over time so that clients can specifically target groups of customers with offers designed to appeal to their lifestyles and preferences.

dunnhumbyUSA’s flagship service is its Web-based dunnhumby Shop that provides access to anonymized sales and customer insights used across sales, marketing and category teams. For example, the data used for the dunnhumby Shop used by Kroger is derived from the transactions of approximately 3.7 billion shopping baskets. These insights are used to determine drivers of brand and category sales performance, types of customers and trends, repeat purchasing and cross-shopping behavior.

In January 2011, the firm partnered with Ruby Tuesday Inc. to incorporate continually updated information about customer behavior and preferences into day-to-day decision making at the company’s restaurants across the United States.

dunnhumbyUSA has 447 full-time employees with 173 full-time-equivalent employees in research-related roles in the United States.



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16

**HARRIS
INTERACTIVE INC.**
HarrisInteractive.com

KIMBERLY TILL, 56

TITLE President and CEO
EDUCATION M.B.A., Harvard Business School, J.D., Duke University

Harris Interactive Inc. (HI), based in New York, was founded in 1975 as Gordon S. Black Corp. and together with Louis Harris and Associates, which was founded in 1956, it became a public company in 1999, listed on the Nasdaq.

U.S. revenue in 2010 was \$93.9 million, down 6.2% from 2010. In 2010, \$72.9 million, or 43.7% of total revenue, was generated outside the United States.

HI is a global custom market research company that uses research, technology and business acumen to transform insight into actionable foresight. The firm is widely known for The Harris Poll, one of the world’s longest-running, independent opinion polls, and for pioneering innovative research methodologies.

It serves clients worldwide through its North American, European and Asian offices, and through a global network of independent market research firms.

Through its Centers of Excellence, HI offers services and experience in the areas of

new product development, brand and communications, stakeholder consulting, reputation management, and youth and education. Its industry experience includes healthcare, public affairs and public policy, energy, automotive, technology, telecommunications, media, financial services, insurance, retail, restaurants and consumer package goods.

In 2010, HI launched several commercial offerings, including products that leverage its social intelligence platform, Research Lifestreaming, which connects the conversations that people are having online and offline with the views they express and the actions they take, resulting in deeper, more actionable insights.

Also in 2010, HI commenced the worldwide implementation of its global panel and survey platform, designed to improve the quality, speed and efficiency of its research operations, and created the Harris Vault, a digital library of nearly 40 years of Harris Polls searchable by topic, date and author.

In 2011, HI plans to expand the size of its Research Lifestreaming panel and develop additional products that leverage its platform, and continue exploiting mobile devices for real-time data feeds, polling and insights.

HI has 443 full-time U.S. employees and has international offices in the United Kingdom, Canada, France, Germany, Hong Kong, Singapore and China.



17

ABT SRBI INC.
AbtAssociates.com

KATHLEEN L. FLANAGAN, 50
(pictured)

TITLE President and CEO
of Abt Associates
EDUCATION M.S., public policy,
University of Rochester

MARK A. SCHULMAN, 65

TITLE CEO of Abt SRBI, the
survey subsidiary of
Abt Associates
EDUCATION Ph.D., Rutgers University

Abt SRBI Inc. in New York is the survey subsidiary of Abt Associates Inc. in Cambridge, Mass., an employee-owned company founded in 1965.

U.S. research-only revenue in 2010 was \$86.8 million, up 11.2% from 2009. Total research and nonresearch revenue in 2009 was \$332 million.

Abt Associates is a global firm in research and program implementation in the fields of health, social and environmental policy, and international development. Known for its approach to solving complex challenges, the company has seven offices in the United States and program offices in nearly 40 countries.

Abt SRBI (Srbicom) is a full-service global research and consulting firm whose survey research capabilities range from sample design and instrument develop-

ment, through data collection (telephone, in-person, IVR, Web) and data management, to analysis and market strategy. Its emphasis on technical quality ensures confidence in measuring effectiveness, launching new products and improving customer satisfaction.

Abt SRBI has eight divisions:

- Analytic and Consulting Division has specialized practice groups in banking and finance, insurance, health-

care and media research. Its domestic and global B-to-B research is conducted here.

- Marketing Insights Division focuses on integrated strategic research approaches, particularly in the CPG, restaurant and retail sectors. It is Abt SRBI's large-scale customer satisfaction survey offering using innovative methods and technologies, including IVR.

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- Government Division conducts large-scale surveys and tracking studies for many U.S. government agencies. These projects include epidemiological surveys, healthcare, military veterans, immigration, domestic violence and program evaluations.
- Public Policy and Public Affairs Division conducts large-scale public policy and public opinion surveys for university researchers, foundations, research institutes and the media. This division is responsible for Abt SRBI's public opinion polling for *Time* magazine and other media.
- Transportation Division provides passenger and customer research to leading public transit authorities, transportation planners and engineering firms. This includes household travel surveys, origin and destination studies, new product and service testing, pricing and passenger satisfaction research.
- Utilities Division serves the electric utility industry. Studies include customer satisfaction and loyalty, marketing issues and the impact of industry deregulation.
- Interviewing Services Division conducts telephone, mail, Internet, IVR and in-person interviewing for other marketing research firms. Abt SRBI has five centralized, fully supervised CATI facilities with nearly 450 stations.

- Advanced Methods Group provides consulting support in areas such as complex sample design, nonresponse error, cell and dual-frame sample designs, weighting, and geographic information systems (GIS).

Abt SRBI has more than 1,700 full-time employees, of which 204 work full time on market research.



18

**LIEBERMAN
RESEARCH WORLDWIDE**
LRWonline.com

ARNOLD FISHMAN, 66

TITLE Founder and Chairman
EDUCATION B.S., Brooklyn College, City University of New York

DAVID SACKMAN, 53 (pictured)

TITLE President and CEO
EDUCATION B.A., University of California at Los Angeles

Lieberman Research Worldwide (LRW), based in Los Angeles, is a privately held corporation founded in 1973.

U.S. revenue in 2010 was \$82.3 million, up 11.8% from 2009. In 2010, \$18.5 million, or 18.4% of total revenue, was generated outside the United States.

LRW is a full-service custom market research firm with experience across a wide range of industries, including entertainment, pharmaceutical technology, automotive, healthcare, retail, food service, financial and business services, consumer goods and more. Through its affiliate network of more than 60 companies, the firm conducts research in more than 80 countries.

LRW uses a research-based consulting model to drive business impact. Its staff consists of senior executives from consulting, advertising, marketing, academia and marketing research. Its Advanced Analytics team is experienced in conjoint, choice, latent class, maximum difference modeling and Hierarchical Bayes modeling, fusion, price testing and optimization, demand forecasting and modeling, market segmentation, brand equity modeling and other custom techniques.

LRW emphasizes five core areas of research experience:

- Strategy Development and Segmentation Research: Strategy experience is LRW's core strength. In segmentation research, the firm determines targets, optimizes



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Puzzle is a premier market research service provider based in the heart of Paris.

With over 20 years of experience, Puzzle has had a reputation as Paris's premier viewing facility since it opened, and continues to cultivate its leadership role today. The facility offers three client rooms and three focus rooms.

Our team of 15 in-house recruiters, and our extensive network of off-site recruiters in over 50 other locations throughout France, is world-renowned for its efficiency, thoroughness and ability to handle all challenges.

We work tirelessly to ensure that only the best moderators, interviewers and translators are in our network. We are conveniently located in Paris, at the Opera, an area both commercial and residential.

Sixty-five percent of our clients are American companies.

marketing mix and develops strategies to maximize performance within target segments. It also deploys techniques and analytic processes to understand where value resides within brands along with the implications for brand building. LRW uses both Fusion and Segmentation by Optimization for reaching unique segments and gaining a clearer understanding of needs. Blending the two segmentation approaches with trade-off analyses enables the firm to optimize product coverage and line demand for target segments.



19

MARKET STRATEGIES INTERNATIONAL
MarketStrategies.com

ANDREW J. MORRISON, 62

TITLE Chairman and CEO
EDUCATION Ph.D., mass communications research,
University of Michigan

Market Strategies International in Livonia, Mich., was founded in 1989. In 2006, Veronis Suhler Stevenson acquired a majority stake.

U.S. revenue in 2010 was \$67.6 million, up 2.0% from 2009. Revenue generated outside the United States in

- **Brand Strategy and Tracking:** LRW continues to expand its brand practice with its R&D-based Relevant Clarity paradigm, which links brand equity directly to financial performance. This product helps directly manage the contribution of brands to changes in sales and profitability.
- **Customer Satisfaction Diagnostic Evaluation and Tracking:** LRW's experience in analyzing consumer attitudes and behavior has enabled the firm to successfully link customer satisfaction to financial performance. LRW's approach helps to identify specific behaviors and actions that can be undertaken to improve financial results. It provides continuous improvement and feedback delivered directly to stakeholders via intuitive dashboards and other online analytical tools.
- **New Product Development:** Using analytical techniques, LRW provides product optimization studies with actionable deliverables. The firm uses proprietary methodology including Ideation and Evolution to generate approaches to new product development.
- **Actionability Suite:** LRW offers the Actionability Suite of products to engage stakeholders in the research process. It consists of four distinct approaches built upon an action-oriented philosophy: Immersion, Lieberman Learning Labs, Actionability Workshops and Synthesis.

In 2010, LRW's Innovations Team developed a virtual car clinic methodology, resulting in approaches that have led to increased research flexibility and lower costs for automotive companies.

In 2011, the firm plans to expand its Asia operations in Shanghai; unveil an evolved brand equity tracking paradigm based on significant R&D efforts; and expand the use of a matrix management approach to further expand its ability to deliver "so what?" thinking.

In the United States, LRW employs 357 full-time employees. Data collection capabilities include Web hosting of 2,000+ simultaneous surveys, 740+ IVR ports across 15 servers at multiple locations, and five telephone centers with 525 CATI stations and the capability to conduct interviews in more than 67 languages. In addition to its Los Angeles headquarters, the company has offices in London; Shanghai, China; New York; Chicago; Charlotte, N.C.; and Huntington Beach, Calif.

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crresearch.com



2009 was \$13.1 million, or 16.2% of total revenue. The growth rate excludes 2009 revenue from the sale of the Perception Analyzer unit in December 2009.

Market Strategies is a market research consulting firm experienced in communications, energy, financial services, healthcare and technology industries. The firm offers global industry knowledge and experience, analytical capabilities, and unique market research programs and services, all geared toward partnership-oriented client service.

Its professionals are focused on their respective vertical industry segments and geographic markets. Market Strategies' specialties include customer experience management to set priorities for service improvement initiatives and employee training; product development and optimization to develop, launch and maintain winning products and services; segmentation to create clear and identifiable consumer segments; messaging and communications testing to develop effective communications programs; brand development and positioning to leverage customer needs and create a framework for managing brand perceptions; and usability evaluation to design customer-focused websites and Interactive Voice Response (IVR) systems.

The firm provides customer satisfaction and loyalty research through its Integrated Research Center (IRC) service for clients that conduct more than 5,000 interviews per month via telephone, IVR or Internet-based data collection. The IRC is supplemented with a customized extranet portal and dashboard reporting system, and a wide range of analytical services.

In 2010, Market Strategies completed approximately 1.2 million telephone interviews from its research centers in the United States and Canada. The firm also managed more than 300,000 Web-based interviews, with an emphasis on physician, technology,

decision-maker and business leader panels. It manages all of its Web-based research.

A full-service Marketing Sciences unit provides a suite of research services including MSImpact Modeling, a structural equation modeling system for customer experience management programs; Brand Manager, a research program that helps clients develop and derive value from established and new brands; MSInnovation, a product optimization and simulation approach that features proprietary choice-modeling analysis; MSTargets, a multiplatform market segmentation analysis service; and MSPositioning, a communications-testing methodology that helps clients identify, track and monitor corporate messaging.

Market Strategies employs 257 full-time staff and 1,100 interviewers, and conducts research in 25 countries across eight global regions. The firm has regional offices in six U.S. cities and Hong Kong.



20

ORC INTERNATIONAL
ORCInternational.com

MARC LITVINOFF, 50

TITLE President
EDUCATION B.S., banking, finance and investments, Hofstra University

ORC International (ORC) in Princeton, N.J., (formerly Opinion Research Corp.) founded in 1938, is the market research division of Infogroup Inc., a privately held firm in Omaha, Neb.

U.S. revenue in 2010 was \$63.9 million, up 1.0% from 2009. In 2010, 34.8% of total revenue, or \$34.1 million, was from work conducted outside the United States. The U.S. revenue for 2009 and growth rate excludes Macro International, which was sold to ICF International Inc. in April 2009.

ORC's products and services integrate market and business research with competitive intelligence, experienced advisory services and social analytics services for insight into the attitudes and needs of both consumers and business executives across a range of industries.

The firm's experience is concentrated in the areas of customer strategies, strategic intelligence and employee engagement research, with focused industry experience in

financial services, consumer packaged goods, healthcare and pharmaceutical, industrial/manufacturing, technology/emerging markets and public sector research.

ORC has been a partner of CNN since 2006 on the CNN/ORC International poll and partners with NYSE Euronext on its annual CEO Report.

The firm offers several specialized services and products in the United States and internationally. Since the 1960s, it has offered a portfolio of CARAVAN omnibus services, including a dual frame (landlines and cell phone) telephone omnibus. Since 1984, it has provided insight and consulting through its Intota Expert Advisory Network (Intota.com), a screened network of more than 13,000 world-class industry experts in the areas of science, engineering, medicine and business.

ORC also offers Social Analytics Solutions, a suite of products integrating social media tools with traditional research methodology, including social listening and social communities; a new offering developed collaboratively with neuromarketing firm Buyology Inc., which is a brand relationship framework building on the work of Buyology founder Martin Lindstrom that integrates traditional research methodologies with neuromarketing techniques to provide insight into consumers' mindsets; CityMARKS, a citizen satisfaction measurement tool for local governments; new product testing; in-home use testing; FDA-related research; and claims substantiation and copyright infringement research.

ORC's U.S. offices are in Princeton, N.J., New York, Chicago, Boston, Seattle and Washington. It has four offices internationally. The firm employs 243 in the United States.



21

MARKET FORCE INFORMATION INC.
MarketForce.com

KARL MAIER, 43

TITLE CEO
EDUCATION B.A., Bowdoin College

Market Force International Inc. (MFI), based in Louisville, Colo., is a privately held corporation founded in 2005.

U.S. revenue for 2010 was \$52.8 million, up 17.6% from 2009. In 2010, 0.6% of total revenue, or \$0.3

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million, was from outside the United States.

MFI is a leading global customer intelligence services firm for business-to-consumer companies including major retailers, restaurants, grocery and convenience stores, financial institutions, entertainment studios and consumer packaged goods companies. It has more than 200 of the world's largest B-to-C companies as clients.

MFI has pioneered the industry with a suite of services that provide clients with the business intelligence they need to satisfy their customers and drive bottom-line results. The firm measures store-level operations and customer attitudes through mystery shopping, customer feedback, market audits and merchandising services, coupled with the analytics to drive targeted improvements.

MFI provides services throughout North America and globally through partners. As of December 2010, it has two Centers of Excellence: Norcross, Ga., providing mystery shopping and customer satisfaction operations, and Albany, N.Y., providing auditing research, theater, and merchandising services and research operations.

The firm currently is working on its Customer Intelligence Platform, which provides a Web-based platform to host all customer-related data, including MFI data, as well as internal financial and other data and third-party data that clients collect from other sources, coupled with powerful analytics and role-based decision dashboards.

The platform will be launched in 2011, starting with the restaurant industry. Work also was begun on new media and mobility strategies.

MFI has 385 full-time employees in the United States.



22

NATIONAL RESEARCH CORP.
NationalResearch.com

MICHAEL D. HAYS, 56

TITLE President and CEO

EDUCATION University of Nebraska

National Research Corp. (NRC) in Lincoln, Neb., founded in 1981, has been a public company since October 1997 when it was listed on Nasdaq.

U.S. research-only revenue in 2010 was \$49.0 million, up 4.9% from 2009. In 2010, \$4.8 million, or 8.9% of total revenue, was from outside the United States. The growth rate excludes 2009 and 2010 research revenue from Outcomes Concepts Systems Inc., acquired in August 2010. Total company revenue for 2010 was \$63.4 million.

NRC offers performance measurement and tracking and improvement services to hospitals, health-care systems, physicians, health plans, senior care organizations, home health agencies and other healthcare organizations.

NRC provides three primary types of information services:

- NRC Picker measures and provides information on the most important aspects of the patient experience by using research technologies with a focus on patient-centered care. Its Catalyst toolkit helps to drive the improvement process through access to data and improvement linked to performance.
- The NRC Healthcare Market Guide is an ongoing study of more than 267,000 households assessing consumers' perceptions of and satisfaction with hospitals and health systems in more than 300 markets across the United States. The Guide, under the Picker name, provides consumer-reported assessments of hospitals and health systems. Consumer quality perceptions, product-line preferences, service use and visit satisfaction are available for more than 3,200 hospitals and health systems. It provides more than 200 data items relevant to healthcare payers and providers.

- The My InnerView division provides quality and performance improvement services to the senior care profession. Services offered include customer and workforce satisfaction, leadership and operational assessment, and clinical and regulatory outcomes.

NRC has 239 full-time and 52 part-time employees in the United States.



23

KNOWLEDGE NETWORKS INC.
KnowledgeNetworks.com

SIMON KOOYMAN, 53

TITLE CEO

EDUCATION M.B.A., Catholic University of Louvain, Belgium

Knowledge Networks Inc. (KN), based in Menlo Park, Calif., is a privately held company founded in 1998.

U.S. revenue for 2010 was \$48.5 million, up 20.6% from 2009. The growth rate excludes 2009 and 2010 revenue from the acquisitions of Caduceus Market Research in December 2009 and Dimestore Media in September 2009.

KN specializes in online research that provides leaders in business, government and academia the confidence to make important decisions. 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 (including cross-media ad campaign evaluation), pharmaceutical research with both physicians and consumers, brand health, brand communication testing, segmentation, new product opportunities and evaluation, public opinion and social issues.

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Other KN resources include:

- KnowledgePanel Latino, a statistically balanced online sample of the U.S. Hispanic population (English- and Spanish-speaking).
- Physicians Consulting Network (PNC), a cross-section of 70,000 U.S. physicians and other healthcare professionals, including specialty panelists.
- KN Dimestore, a platform for measuring the brand effects of online display and in-stream ad campaigns.
- National Shopper Lab, a panel of 22 million frequent shoppers available for in-store and new product research.

In 2010, KN announced new services for mobile (Quant) and social media research (The Faces of Social Media). In both, the firm is leveraging industry platforms and experience to provide insight.

KN has also announced that in 2011, it will more than double the number of young adults (ages 18 to 24) on KnowledgePanel and will increase its representation of Hispanics by more than 40%. With this increased online survey capacity, users of KnowledgePanel and KnowledgePanel Latino—including users of KN's Service Bureau—will have more statistical power for studies of the entire United States and its subpopulations, including these two groups.

In 2009, KN was the first survey research company to

use an address-based sampling frame for recruitment of its online survey research panel. This statistically valid sampling advancement results in the inclusion of cell-phone-only households in its online surveys.

KN 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 that marketers use to make decisions.

KN operates from six U.S. offices in Menlo Park, Calif.; New York; Chicago; Cincinnati; Roseland, N.J.; and Needham, Mass. There are 161 full-time employees.



24

BURKE INC.
Burke.com

JEFF MILLER, 48

TITLE CEO

EDUCATION M.B.A., University of Cincinnati

Burke Inc., based in Cincinnati, was founded in 1931 and has been an independent, employee-owned company since 1989. It became 100% ESOP in 2008.

U.S. revenue in 2009 was \$45.4 million, up 16.7% from 2009. In 2010, \$5.4 million, or 10.6% of total revenue, was from outside the United States.

Burke is an independent, full-service marketing research and decision support company. The firm capitalizes on its research execution, analytical techniques and technology to provide decision support services to companies across all major industry sectors. It also is the industry leader in marketing research and consumer insights education through the Burke Institute.

Burke's reputation derives from experience in defining problems, developing research designs, executing complex studies, analyzing data and interpreting results to make informed decisions. The firm has experience in a broad range of industries, both domestic and international, and across many data collection methods, including online and mobile. All of Burke's core competencies are supported by an active commitment to internal research and development programs.

Burke's primary areas of focus include:

- Custom Marketing Research: Burke provides full-service custom research, analysis and consulting for consumer and B-to-B product and service companies. Services include product testing, brand equity research, pricing research, market segmentation, image

and positioning studies, social media research and a wide range of marketing research protocols targeted at both tactical and strategic business issues.

- Customer Loyalty and Relationship Management: The firm helps to develop and deploy customer loyalty and relationship management systems that focus internal resources on customer requirements. Burke's Digital Dashboard online reporting service provides secure, real-time access to survey findings.
- Employee Engagement and Retention: Services include broad-based employee engagement surveys along with targeted tools on topics related to employee engagement including culture and values, internal customer service, diversity and inclusion, health and wellness, and performance management. Burke also offers new hire and exit surveys.
- Linkage and Integration: Linkage analysis helps to align multiple sources of information by quantitatively linking financial, customer, operational, employee and secondary data toward making financially optimal decisions.
- Research Education: The Burke Institute has trained more than 75,000 participants from 10,000 companies through more than 3,000 public and in-house customized marketing research seminars in 40 different countries. Seminars cover research topics such as general marketing research, qualitative and online research, questionnaire design, customer loyalty, and analytical tools and techniques.
- Shopper Research: Burke offers a set of qualitative and quantitative shopper research services. The firm's qualitative services include "shop-alongs," in-store observations and in-home interviews. In quantitative, Burke offers shopper segmentation, retailer loyalty, shopper decision hierarchy, and general shopper habits and practices studies.
- Burke Qualitative: Burke has experience using the full range of qualitative formats including focus groups and interviews, and ethnographic research, as well as online bulletin boards and other technology-enabled platforms. Insights can be enriched through social media monitoring and analysis. Moderators also are well-versed in traditional techniques such as laddering, projection, ideation and a wide variety of other qualitative approaches.
- Burke Healthcare: This area provides experienced and dedicated healthcare industry staff, many with professional accreditation or clinical backgrounds.

Burke has 205 full-time employees and 148 part-time employees in the United States.



25

MVL GROUP INC.
MVLgroup.com

ADAM ROGERS, 48

TITLE President and CEO

EDUCATION B.B.A., accounting, University of Cincinnati

MVL Group Inc. (MVL), based in Jupiter, Fla., is a privately held firm formed in 1998 and majority-owned by Ares Capital Corp. in Atlanta, Ga.

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U.S. research revenue for MVL's full-service market research units in 2010 was \$45.0 million, up 12.8% from 2009. Total research revenue for MVL in 2010, including data collection and online units, was \$73.1 million.

MVL's full-service marketing research companies include:

- MRSI (Marketing Research Services Inc.) (MRSI.com) in Cincinnati provides custom quantitative and qualitative research services along with analytic services to consumer and B-to-B clients in industries such as consumer goods, financial services, retail, restaurant, pharmaceutical and healthcare. The company specializes in product development research and Hispanic research with ENFOQUE service.
- Target Research Group (TargetResearchGroup.com) in Nanuet, N.Y., offers qualitative and quantitative research design, execution, processing and analytical services using multiple techniques in the United States and internationally. It has experience working with concept, product, advertising and package testing, as well as strategic research for food, beverage, personal care and other CPG, financial and media companies. It also conducts legal research in claims substantiation, intellectual property disputes and misleading ad issues.

MVL's online research and data collection companies include:

- ActiveGroup (ActiveGroup.net) in Atlanta is a research technology company that operates as an information distribution vehicle for gathering and delivering online qualitative market research content to users globally. AG began as a video-streaming service for focus group facilities and has grown beyond this initial core product through its Ion Suite of services to include other online qualitative capabilities such as bulletin boards, online focus group and IDI capabilities, and chat-based focus group services. It partners with companies worldwide and provides portable access to these services at any location across a network of more than 1,200 U.S. and international sites.
- Carbonview Research (Carbonview.com) in Jupiter, Fla., specializes in online technology to deliver custom market research services. It offers "C2View" a non-intrusive online product that allows for usability testing and remote monitoring of user behavior on the Internet, as well as "CVEngage," a dynamic, qualitative, one-on-one feedback mechanism for quantitative online surveys allowing for a hybrid approach to increased qualitative information.
- Discovery Research Group (DiscoveryResearch.com) in Salt Lake City specializes in multi-modal based market research services, research dashboards and feedback management services. It uses online, mobile, social media and telephone research collection methods to assist consumer and business-to-business organizations. Along with its technology-driven services, DRG has more than 450 interviewing stations in six U.S. and Costa Rican call centers. The firm has experience in healthcare, technology, product feedback and customer satisfaction research, and has become a provider for social media research and mobile research techniques.

qualitative facilities, as well as additional in-person capabilities worldwide. It is unique in its approach to market research as it allows for real-time, in-person access to consumers and their interactions with the products being evaluated.

MVL has 390 full-time and 1,525 part-time U.S. employees. MRSI and Target Research Group have 204 full-time U.S. employees.



26

**COMMUNISPACE
CORP. INC.**
Communispace.com

DIANE HESSAN, 56

TITLE President and CEO
EDUCATION M.B.A., Harvard
Business School

Communispace Corporation Inc. (CC) in Watertown, Mass., was founded in 1999 and acquired by the Diversified Agency Services division of Omnicom Group Inc. in February 2011.

U.S. revenue in 2010 was \$43.6 million, up 25.6% from 2009. In 2010, 8.8% of total revenue, or \$4.2 million, was from outside the United States.

CC creates highly engaged online customer communities to gain business insights, ideas and intelligence for speeding new product development, increasing marketing effectiveness and building customer loyalty.

More than 400 individual customer communities have been built and operated by CC for 100-plus clients among Fortune 1000 companies in a range of industries, including consumer packaged goods, entertainment, financial services, healthcare, technology, retail and Internet service providers.

The firm's full-service capabilities include facilitation, community management and content analysis in multiple languages with multiple cultural nuances. Comprehensive recruiting and member management services serve global clients that reach community members in 92 countries. This allows CC to uncover marketplace trends and new patterns in customer behavior across regions and cultures.

CC communities consists of 300-500 invited consumers who regularly spend time brainstorming ideas, offering advice, sharing experiences and feelings, discussing trends, and figuring out marketing and business issues. Each community is run by a team of managers to ensure relevance and encourage participation.

CC has additional offices in Atlanta; Chicago; New York; San Francisco; London; Sydney, Australia; and Imperia, Italy. There are 295 full-time employees in the United States.



27

**VISION CRITICAL
COMMUNICATIONS INC.**
VisionCritical.com

ANGUS REID, 63

TITLE CEO
EDUCATION Ph.D., sociology, Carleton University,
Ottawa

Vision Critical Communications Inc. (VC), based in Vancouver, B.C., is a privately held firm founded in 2000.

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U.S. revenue for 2010 was \$43.0 million, up 29.9% from 2009. In 2010, 30.6% of total revenue, or \$19.0 million, was from outside the United States.

VC creates and uses online market research tools. Its approach brings together people, ideas and practices, blending interactive technology, strategic research and panel experience. Grounded in both research and technology, it creates platforms and approaches that deliver consumer data, which can be customized to any research project.

In technology, the firm's product development efforts have enabled services such as community panels, visual surveys and virtual 3D environments. Sparq, VC's flagship service, is a community panel platform that manages online communities, private panels and online surveys. Sparq features survey creation with sophisticated attributes that keep respondents engaged. It allows exploring cross-study reports, tweaking weights and set-up filters to build tables and charts instantly, as well as tracking the participation of individuals and groups over time, monitoring panel health and sharing results with respondents. VC currently has 450 proprietary panels under management around the world, which are using Sparq and its associated support services to conduct qualitative and quantitative research.

By continually focusing on emerging trends, the firm's researchers help to stay ahead of change, designing visu-

ally engaging surveys and data deliverables, managing online panels and providing advice on the business implications of specific decisions.

In 2010, VC nearly doubled its R&D staff levels, added new sales capacity and doubled its investment in IT infrastructure. It also introduced three Web-based products into the market: IdeaScreenPlus, which allows bringing the best business ideas to market; ReactionPlus, which measures reaction to audio and video content on multiple dimensions; and Firefly, a collaborative survey tool.

VC's research practices are led by industry veterans who help to test product ideas, assess brands, poll public opinion and make better business decisions. With offices in 10 cities across North America, Europe and Australia, the firm offers a global perspective in nearly every industry niche, from consumer goods, retail and technology to financial services, health, public affairs and media.

VC's plans for 2011 include the launch of its Research on Research initiative in which its staff share their best practices with the market research industry at large, as well as the debut of the firm's most recent service, Sparq 2.0.

VC has a full-time U.S. client service staff of 49 in New York, San Francisco and Chicago offices.



28

DIRECTIONS RESEARCH INC.
DirectionsResearch.com

RANDY BROOKS, 63

TITLE Founder and President
EDUCATION M.B.A., University of Cincinnati

Directions Research Inc. (DRI) in Cincinnati is a privately held company founded in 1988. Ownership is held by 26 members of DRI's senior staff.

U.S. revenue in 2010 was \$37.5 million, up 11.3% from 2009.

DRI is a full-service custom research company that develops long-term partnerships with its clients in which substantial responsibility for design, analysis and presentation is handled by experienced and dedicated client teams.

DRI's staff has a mix of client-side and supplier-side experience, and can apply creative approaches and experience in a practical way. The firm is structured to allow senior researchers to work with clients on a day-to-day basis, doing research, rather than handing it off. Its staff averages more years of market research experience per person than most other research firms in the industry.

The firm supports all industry sectors but has concentration in packaged goods, restaurants, retail, financial services, technology, consumer health and pharmaceuticals. It offers B-to-C and B-to-B services internationally, surveying consumers, professionals, restaurant employees, medical staff and other difficult-to-reach audiences worldwide using a broad selection of data collection methods. DRI partners with industry-leading experts who provide high-quality data and information at competitive prices.

DRI has a mix of innovative and proven approaches that it customizes to the research challenge. The firm answers difficult questions every day in all areas of its business, but DRI's core competencies include concept and product testing, with success modeling; sensory testing; attitude, trial and usage; brand and product quality tracking; product, package and pricing optimization; retail messaging and positioning; market attitude, positioning and segmentation; brand equity and customer loyalty; complex experimental design and analysis; and custom database development and volume forecasting.

The firm regularly invests in R&D projects designed to examine issues of interest to clients, prospective clients and the industry. In 2010, R&D efforts included three projects: A survey of attitudes toward the U.S. government's national healthcare plan; a survey of consumer attitudes toward banks and other financial institutions; and a study of the relative sensitivity of using rankings as opposed to ratings to measure consumer attitudes. All three have been shared with the industry.

DRI has senior client service staff in close proximity to key accounts with offices in: Chicago; Dallas; Minneapolis, Charleston, S.C.; Richmond, Va.; Pittsburgh; and Seattle. The firm employs a full-time staff of 128.

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29

**PHOENIX MARKETING
INTERNATIONAL**
PhoenixMI.com

ALLEN R. DECOTIIS, 58 (pictured)

TITLE Chairman and CEO
EDUCATION Ph.D., administration and statistics,
Emory University

SANFORD M. SCHWARTZ

TITLE President
EDUCATION Ph.D., sociology, Catholic University

Phoenix Marketing International (PMI) in Rhinebeck, N.Y., is a privately held company founded in 1999.

U.S. revenue for 2010 was \$35.8 million, up 14.0% from 2009. In 2010, \$5.4 million, or 13.1% of total revenue, was from outside the United States.

PMI is a full-service market research science firm with global capabilities, offering insight into customers and markets with its existing proprietary data. Its researchers are experienced in a wide range of industries, and coupled with its tools and the latest research techniques in both qualitative and quantitative applications, PMI

provides salient insights into business issues. The firm combines primary and syndicated marketing research experience with database analytics and modeling proficiency.

PMI provides services focused on the return on marketing investment (ROMI). It serves many of the largest companies in the affluent, automotive, financial services, healthcare, media, multicultural, technology, and travel and leisure markets worldwide.

The firm's research capabilities include global qualitative and quantitative experience across a wide variety of areas including concept development, customer satisfaction, brand and market measurement, service quality measurement and financial measurement. It conducts a large-scale syndicated tracking advertising and communication audit and performance evaluation system—AdPi and BrandPi Audits—for leading companies in the automotive, financial services, healthcare and technology industries. Its syndicated products include Affluent Market Services, Automotive Concept X, Consumer Convergence 360, QuadPlay, Asian American Report, Virtual Mailbox, Hotel BASE and Hotel SCORES.

PMI has offices in New York and Rhinebeck, N.Y.; Natick, Mass.; Castro Valley, Calif.; Birmingham, Mich.; Horsham, Pa.; Miami; Durham, N.C.; Somerset, N.J.; Salisbury, Md.; and East Granby, Conn.; with international offices in London and Madrid. The firm has a full-time U.S. staff of 113 employees.



30

**INTERNATIONAL
COMMUNICATIONS RESEARCH**
ICRsurvey.com

ROBERT J. THOMAS, 63 (pictured)

TITLE Executive vice president
EDUCATION M.B.A., marketing, University
of Tennessee

MELISSA HERRMANN

TITLE Executive vice president
EDUCATION M.A., Annenberg School of Communication, University of Pennsylvania

International Communications Research (ICR/SSRS) in Media, Pa., was founded in 1983. Since 1986, it has been a subsidiary of Mount Laurel, N.J.-based AUS Inc., a privately held company.

U.S. research-only revenue in 2010 was \$35.4 million, down 2.5% from 2009. In 2010, 2.2% of total revenue, or \$0.8 million, was from outside the United States. Total research and nonresearch revenue for ICR in 2010 was \$41 million.

ICR/SSRS is a full-service market research firm specializing in designing customized services. Its in-house resources include a staff of experienced researchers and four interviewing centers.

The firm has experience in CPG, pharmaceutical, telecommunications/technology, financial services/banking/insurance, healthcare services, business-to-business, utilities/energy, media/entertainment and retailing markets.

Its Social Science Research Solutions (SSRS) division is focused on public opinion polling, social science research and research specifically in the areas of public relations and advertising, religion, and sports and leisure.

ICR/SSRS designs and executes custom research for complex business issues. These include market sizing and segmentation, concept and product tests, pricing, brand positioning, messaging, strategy and motivational research, advertising effectiveness, usage tracking, and customer loyalty and satisfaction. It is experienced in surveying low-incidence and multicultural populations.

The firm is a provider of omnibus research services in the United States, including EXCEL, a twice-weekly sample of 1,000 adults age 18 and older that includes interviewing with cell phone households; TeenEXCEL, a monthly study among 500 teens ages 12 to 17; SmallBizEXCEL, a monthly study among 500 decision makers at companies with fewer than 100 employees; and HispanicEXCEL, a monthly omnibus targeting a nationally representative sample of 1,000 Hispanics.

There are 287 full-time employees and 319 part-time employees in the United States.



31

MORPACE INC.
Morpace.com

FRANCIS J. WARD, 65

TITLE CEO
EDUCATION B.A., marketing, Wayne State
University

Morpace Inc., based in Farmington Hills, Mich., is a privately held corporation founded in 1941.

U.S. revenue in 2010 was \$32.5 million, up 46.4% from 2009. In 2010, 14.5% of total revenue, or \$5.5 million, was generated from work conducted outside the United States.

Morpace is a full-service market research and strategic

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consulting organization that executes large-scale qualitative and quantitative research globally.

The firm offers in-depth experience in six core industries: automotive, CPG, financial services, healthcare, retail and technology. It has expanded in healthcare to include medical technology and reimbursement services, and in financial services to include both banking and insurance services.

Industry experts work closely with research professionals in four specialties: market and product development; brand and communications; shopping and choice; and satisfaction, loyalty and retention.

Morpace has full-service advanced analytics and qualitative insights teams that complement the efforts of the industry experts and areas of specialization. This is accomplished through specialized approaches from choice modeling and PLS to online qualitative and visual storytelling.

It offers a full range of research tools and consulting services that help clients make more informed strategic decisions designed to help improve client performance. These include:

- Predictive Research Optimization Model (PROM) strengthens the relationship between research findings and business decisions by allowing “what if” scenarios.
- Strategic Optimization of Complex Offerings (SOCO) is a configurator-based research service designed to complement choice modeling by optimizing features or services.
- B-Link identifies the linkages between the benefits consumers seek from a product or service and the particular product features that deliver these benefits.
- Morpace Omnibus provides insights on today’s issues among consumers and small-business owners.
- Facility assessments—an objective, third-party evaluation of franchise or corporate-owned locations—measures consistency, conformity, overall presentation, messaging and brand elements.
- TeleCam allows clients to see respondents’ facial expressions using an online webcam, giving them a better understanding of respondents’ meaning behind the words.

- In the Morpace eCommunity, consumers share opinions and experiences in a qualitative and quantitative longitudinal environment that achieves reliable results.

Morpace has a large, highly skilled software development team that uses a combination of in-house-developed and off-the-shelf tools to provide customized client services. These services include features such as a customizable data collection system that manages online research in virtually any language. It provides powerful development, tracking and reporting tools on a real-time basis. Also, Morpace has developed interactive visual dashboards that integrate multiple studies allowing end users and management to monitor progress and interactively interrogate the data. This team also supports the data processing group, which provides a suite of proprietary and industry standard relational database services.

Morpace quality initiatives include ISO 9001:2000 certification, an internationally recognized quality management system. Many industry practices also have received recognition for their quality standards.

The firm has 125 full-time employees in the United States. The firm has offices in Irvine, Calif., and London, and will expand to Shanghai, China, in 2011. Its Impulse focus group facility is located at its corporate headquarters in Farmington Hills, Mich.



32

LIEBERMAN RESEARCH GROUP
LiebermanResearch.com

MARK LEFKOWITZ, 68

TITLE Chairman and CEO
EDUCATION B.A., City College of New York

Lieberman Research Group (LRG), based in Great Neck, N.Y., is a privately held corporation founded in 1966.

U.S. revenue in 2010 was \$30.1 million, up 19.9% from 2009.

LRG is a full-service marketing research and consulting firm specializing in strategic research, stakeholder satisfaction, advertising and communications tracking, and tactical research among consumers, healthcare professionals and business executives. Its clients include healthcare, technology, banking and finance, travel, leisure, transportation, retail and food services.

The firm is a member of the Research Alliance, a global network of 20 companies in Europe, Latin America and Asia that provide design and interviewing services worldwide.

LRG is composed of specialized business units devoted to study design and analysis, data collection and data management. The firm has an analytic group with experience in market segmentation, choice modeling, predictive modeling and forecasting.

LRG’s main products include:

- Market Segmentation Research: LRG conducts strategic market segmentation among healthcare professionals, business executives, consumers and patients. It has developed services for defining global segments and tying market segmentation models back to client databases.
- Choice Using Simalto is a tool for trade-off analysis, which is easily understandable and engaging to respondents. Simalto can accommodate up to 36 features, with nine options per feature. It predicts consumer preferences for both potential and existing competitive products.
- COMPEL is a tool for selecting the best set of messages for promotions, such as advertising, sales calls and public relations. It is a choice-based system that combines measures of motivational power, uniqueness, believability and synergy to identify optimal message sets.
- TRACER is a communications tracking system that measures whether advertising has broken through the clutter, communicated key messages and had an effect. It provides insights into ideal media weights and more efficient media mix, and suggestions for more creative advertising.

- PDA Research is a data collection technique that uses handheld computers to conduct personal interviews anywhere at anytime.

The company has 106 full-time employees, with full-service offices in New York and Great Neck, N.Y. It has a telephone center with 400 CATI-equipped stations and can do continuous interviewing in more than 20 languages. Data processing capabilities include a fully staffed facility offering tabulations produced with Quantum software and panel experience.



33

RADIUS GLOBAL MARKET RESEARCH
Radius-Global.com

CHIP LISTER, 57

TITLE Managing director
EDUCATION B.A., Temple University

Radius Global Market Research in New York (formerly Data Development Worldwide), is a privately held corporation founded in 1960.

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The implementation, audit and certification of **ISO 20252** and **ISO 26362** research standards:

- Improves productivity and efficiency
- Reduces error, rework and costs
- Assures clients that quality controls are in place
- Provides training platforms
- Ensures consistency and continuous process improvement

CIRQ is an independent, non-profit certification body established by CASRO to offer auditing and certification services to research companies wishing to adopt these global standards.



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U.S. revenue in 2010 was \$29.2 million, up 5.8% from 2009. In 2010, \$1.4 million, or 4.6% of total revenue, was from outside the United States.

Radius is a full-service custom marketing research firm that provides a number of approaches that address a range of development, marketing and communications issues.

- Radius Brand assesses a brand to build higher profit margins. It provides understanding of a brand's value and proposition with Equity Builder, then monitors and strengthens equity factors with Equity Check.
- Radius Communication makes messaging as compelling as possible. Message Optimizer identifies the optimal positioning platform by maximizing both the emotional and rational aspects. AdvertisingCheck helps evaluate ongoing marketing and advertising programs.
- Radius Competitive Assessment increases a brand's perceived value among consumers. Opportunities and Barriers helps evaluate and improve competitive position, while MarketCheck provides an ongoing monitor of the landscape and competitive relationships.
- Radius Market Strategy enhances a brand's position in the competitive landscape. Configure provides insights into the structure of the market, while Segmenter identifies core targets. Predictor links survey and marketing data to increase sales.

- Radius Price discovers how to leverage the right price point to achieve profitability and market success. PriceDeveloper identifies the optimal pricing strategy in a competitive context for both new and existing brands.

- Radius Product leverages more accurate and cost-effective approaches to guide the decision-making process. It uses OptionDeveloper to maximize the impact of a new concept. LineDeveloper selects the right pathway to line extensions.

- Radius Satisfaction gains an understanding of how to build upon or improve customer loyalty. LoyaltyDeveloper helps prioritize what factors optimize loyalty, while LoyaltyCheck monitors progress at influencing consumers.

- Radius Shopper Insights assesses subtle and complex influences upon the in-store purchase decision. EyeScan measures the impact of packaging on shelf and among competitors, while Virtual Environments simulates in-store elements through an innovative computer technology.

In 2010, Radius launched a subsidiary, Radius EMEA in London. The firm has offices in eight U.S. cities and employs 92 full time in the United States.



34

SERVICE MANAGEMENT GROUP INC.
SMG.com

ANDY FROMM, 42

TITLE President and CEO
EDUCATION B.A., Boston University

Service Management Group Inc. (SMG), based in Kansas City, Mo., is a privately held firm founded in 1991 as a unit of Barkley Evergreen and spun off as a separate company in 1999.

U.S. revenue in 2010 was \$28.5 million, up 0.4% from 2009. In 2010, \$1.3 million, or 4.4%, was from outside the United States.

SMG's Service Profit Chain service defines the firm's approach because it demonstrates the link between a company's customer satisfaction and loyalty, employee satisfaction and loyalty, and financial performance.

SMG provides several services, which are concentrated in the restaurant and retail industries:

- Customer Experience Measurement: SMG continuously monitors service levels and satisfaction in each location of multi-unit companies. Data is collected

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primarily via Web and IVR surveys. Customer feedback is reported on a Web-based, real-time performance dashboard that includes online analytics and service improvement tools.

- **Employee Experience Measurement:** The firm measures employee loyalty plus satisfaction and commitment. Surveys are custom-developed by brand to reveal the strength of the relationships between the attitudes of employees and the key drivers of customer satisfaction and loyalty.
- **Internal Customer Surveys:** For multi-unit operations, SMG measures the effectiveness of internal support systems. The firm conducts internal customer surveys that measure management effectiveness and service quality delivered from internal service providers.
- **Benchmark Data:** SMG maintains databases of comparative data in retail and restaurant industry segments for performance comparisons based on common service attributes.

SMG, with 155 full-time U.S. employees, has offices in Kansas City, Mo., Minneapolis, Denver and London.



35

MARKETCAST
MarketCastOnline.com

HENRY SHAPIRO, 47

TITLE Vice president and general manager

EDUCATION M.B.A., Harvard Business School

MarketCast, based in Los Angeles, was founded in 1987 and acquired in 2000 by Reed Elsevier plc in the United Kingdom, a public company.

U.S. revenue for 2010 was \$27.6 million, down 3.2% from 2009. In 2010, 14.6% of total revenue, or \$4.7 million, was generated from work conducted outside the United States.

MarketCast is a marketing research firm servicing the global entertainment industry. The firm consults on marketing and distribution strategies for movie and DVD releases and TV shows for a client base that includes most of the major motion picture studios, along with independent producers and cable and broadcast TV networks.

The firm's research services include positioning analyses, focus groups, advertising testing, DVD package tests, tracking studies, recruited screenings, volumetric forecasts, attitude and usage studies, brand studies, segmentation studies and product launch studies.

MarketCast has offices in Los Angeles, Boston, New York and London. It employs 50 full time in the United States.



35

PUBLIC OPINION STRATEGIES LLC
POS.org

BILL MCINTURFF, 58

TITLE Partner and co-founder
EDUCATION B.S., Boston University

Public Opinion Strategies LLC (POS), based in Alexandria, Va., is a partnership founded in 1991.

U.S. revenue for 2010 was \$27.6 million, up 135.9% from 2009.

POS is a national political and public affairs research firm that has conducted more than 5 million interviews

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with voters and consumers nationally and in more than a dozen foreign countries, including 1,500-plus focus groups.

About half of POS' research is dedicated to winning elections for candidates from the city council to the presidential level, and for initiatives. The other half of the work is involved in public policy, working with industry coalitions, government entities and private companies. Research includes corporate image, community relations and crisis management for local companies, Fortune 500 corporations and industry associations. Some of the industries served include airlines, energy, financial, gaming, healthcare, technology, hospitality, insurance, real estate, retailers, sports and stadiums, telecommunications, tourism, transportation and utilities.

A wide array of research techniques are used:

- **Quantitative:** POS' specialty is telephone polling using its own telephone center with more than 400 CATI-enabled data collection stations. Telephone polling includes in-depth executive interviewing, nightly tracking surveys, monthly national omnibus surveys, benchmarks and B-to-B interviewing. POS uses the Internet for targeted research purposes, including for online focus groups, Web page testing, advertising testing, and online surveys for companies and associations.
- **Qualitative:** POS conducts traditional focus groups and in-depth interviews, and uses techniques that blend quantitative and qualitative research, including mall intercepts and Perception Analyzer dial groups. The firm also coordinates and moderates qualitative research projects, including message and advertising testing, and logo and tagline development.

POS has offices in Redondo Beach, Calif., and Denver. It has a staff of 31 full-time employees.



37

INFORMA RESEARCH SERVICES INC.
InformaRS.com

MICHAEL E. ADLER, 47

TITLE President and managing director
EDUCATION M.B.A., Marshall School of Business, University of Southern California; J.D., Loyola Law School, Los Angeles

Informa Research Services Inc. (IRS), in 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.

U.S. revenue for 2010 was \$24.9 million, up 6.4% from 2009.

IRS is a provider of market research, specifically competitive intelligence, customer satisfaction research, mystery shopping and compliance testing services. The firm has a strong background in the financial services industry. It serves all sectors of financial services, including retail banks, credit unions, bank-owned and independent mortgage companies, insurance brokerages and mutual funds.

IRS's mystery shopping programs help increase deposits, new account growth, cross-sales and depth of accounts by motivating and recognizing superior and consistent employee performance. Among its mystery shopping services are sales and services quality evaluation, legal and match-pair testing, compliance, discrimination and misleading sales practices testing. It pioneered the use of mystery shopping and matched-pair testing, and developed the technique for post-application testing to detect discrimination and predatory lending.

The firm is a leader in the use of market research to limit the risk associated with allegations of discrimination, predatory lending and misleading sales practices.

IRS provides post-transaction interviewing and Web-based reporting tools to measure and report customer satisfaction and customer problems within hours of a recent customer experience. The firm maintains a Web panel of

more than 160,000 consumers for mystery shopping, interviewing and online surveys.

The firm is experienced in all phases of market research, including competitive intelligence, new product and usability testing, customer satisfaction and loyalty research, and brand and advertising awareness research.

The firm has a full-time staff of 198.



38

C&R RESEARCH SERVICES INC.
CRresearch.com

ROBBIN JAKLIN, 51

TITLE President
EDUCATION B.S., University of Illinois

C&R Research Services Inc. (C&R) in Chicago is a privately held corporation founded in 1960.

U.S. revenue in 2010 was \$23.5 million, up 3.1% from 2009.

C&R Research is a full-service market research company specializing in traditional qualitative and quantitative research as well as online, community-based research across many platforms. The firm uses target-appropriate research tools, coupled with industry experience, to provide insights that guide business decisions.

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

In addition to its research capabilities, C&R has a number of specialized divisions and services with online panels, bringing demographic experience and customization to its projects.

- Under its youth and family business, KidzEyes and TeensEyes divisions offer analysis into the youth demographics. With years of youth research experience and analysts trained in childhood development, C&R is adept at understanding the youth market. ParentSpeak, a natural extension of its youth divisions, offers insight into the world of moms and dads through its social network of thousands of parents. Analysts routinely navigate the complex world of families, identifying key variables and differences to understand and communicate to this key demographic.

- In support of its youth and family business, C&R offers a subscription service to YouthBeat, which provides access to information and insight into the youth-and-family market based on continuous tracking of kids, tweens and teens ages 6 to 18, and their moms and dads.

- LatinoEyes is C&R's Latino market consultancy division. Services include immersion courses, strategic consulting, competitive analysis and full-service qualitative and quantitative market research. LatinoEyes has a team of dedicated researchers who understand both the U.S. and Latino culture and have more than 15 years of experience specializing in the Latino market.

- BoomerEyes focuses on what drives the baby boomer market and how business can harness the purchasing



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power of boomers. Backed by segmentation, BoomerEyes has the experience to conduct research and interpret the findings to make informed decisions.

- ShopperEyes is dedicated to bringing the retail customer experience to life. C&R has many years' experience conducting shop-alongs, shopper intercepts, in-home ethnographies, video and photo journals, and packaging, concept and positioning work for its retail, CPG and restaurant clients across all key channels and categories.

C&R has 108 full-time employees.



38

**NATIONAL ANALYSTS
WORLDWIDE**
NationalAnalysts.com

SUSAN SCHWARTZ MCDONALD, 61

TITLE President and CEO
EDUCATION Ph.D., University of Pennsylvania's
Annenberg School

National Analysts Worldwide (NA) in Philadelphia was established as the world's first market research unit in 1911 by Curtis Publishing Co. (publisher of *The Saturday Evening Post* and *Ladies Home Journal*). It became a separate corporate entity in 1943 and was reorganized as an employee-owned company in 2004.

U.S. revenue in 2010 was \$23.5 million, up 1.3% from 2009.

NA is a hybrid market research and consulting firm that addresses strategic business issues in a wide range of industry sectors, including healthcare, information technology, financial services, communications and B-to-B. Its depth of marketing experience in key verticals, combined with its inventive research capabilities and advanced analytics, supports a consultative approach 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, innovation and transformation, brand health and life cycle management.

Project leaders are supported by an in-house team of methodologists and a portfolio of modeling tools and software customized to address marketing problems and applications, including Farsight forecast modeling services. NA's history includes the development of probability sampling, the early development and application of focus group methodology, and its work in consumer and business market segmentation.

NA is widely known for building integrated forecasting and revenue models that reflect the interactions of multiple stakeholders and customers (in markets such as healthcare and B-to-B marketing). Specialized services that draw on research design capabilities include litigation and regulatory support, often involving expert testimony.

The firm's NAscence Group supports bio-innovation within "big pharma" and emerging companies by providing forecasting and other research services in support of commercialization strategy.

NA is a founding member of CASRO. It employs 77 full-time professionals.



40

KS&R INC.
KSRinc.com

RITA L. REICHER, 58

TITLE President
EDUCATION Ph.D., economics, Yale University

KS&R Inc., based in Syracuse, N.Y., is a privately held company founded in 1983.



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U.S. revenue in 2010 was \$22.0 million, up 11.7% from 2009. In 2010, \$4.6 million, or 17.3% of total revenue, was from outside the United States.

KS&R is a global custom market research firm with a diverse client base that provides a full range of integrated qualitative, quantitative and consulting services. It uses advanced analytic techniques and technology to provide marketing knowledge, strategic insights and decision support services.

The firm's services are based around dedicated business teams focused on major industries, such as the technology, telecommunications, transportation, medical devices and healthcare, retail, and finance and insurance verticals. KS&R's staff includes business strategists with client-side experience, qualitative specialists and experienced analytic professionals.

Capabilities include new service innovation and product development; market opportunity assessment (sizing and segmentation); brand strength and customer experience measurement; advertising testing and management; channel and partner strategy; pricing optimization and buyer behavior research.

KS&R expanded its medical devices and healthcare practice in 2010, emphasizing qualitative techniques to support complex business issues and deliver marketing insights across the product lifecycle, including concept development and packaging.

KS&R also continues to expand its global research services, measuring customer satisfaction and loyalty among stakeholders, sales forces and customers in more than 50 countries, including many of the emerging nations across Asia, Africa and South America.

The firm expects continued growth in 2011 as it debuts new tools for respondent engagement and insight, including virtual communities for qualitative exploration and quantitative measurement.

KS&R owns and operates INSITE, a 110-seat survey contact center; a unified, global data collection and partner network; and Centers of Excellence in qualitative and quantitative research.

The firm employs 168 full time and has offices in New York; Atlanta; Memphis, Tenn.; Seattle; and Frankfurt, Germany.

pricing, branding and segmentation. The firm offers a full range of quantitative and qualitative research and works across industry groups in both consumer and business sectors, and is focused on analytical insights.

MVR invests significantly in its research-on-research program, particularly in the area of quantitative research design and analysis, and is shared with the research community. It also proves a vari-

ety of qualitative research training and developments programs for clients and individuals.

The firm's capabilities include:

- Advanced Analytical: MVR's Marketing Sciences Group blends technical skills with creative approaches to deliver insights into clients' businesses. It is especially skilled in discrete choice and conjoint techniques.

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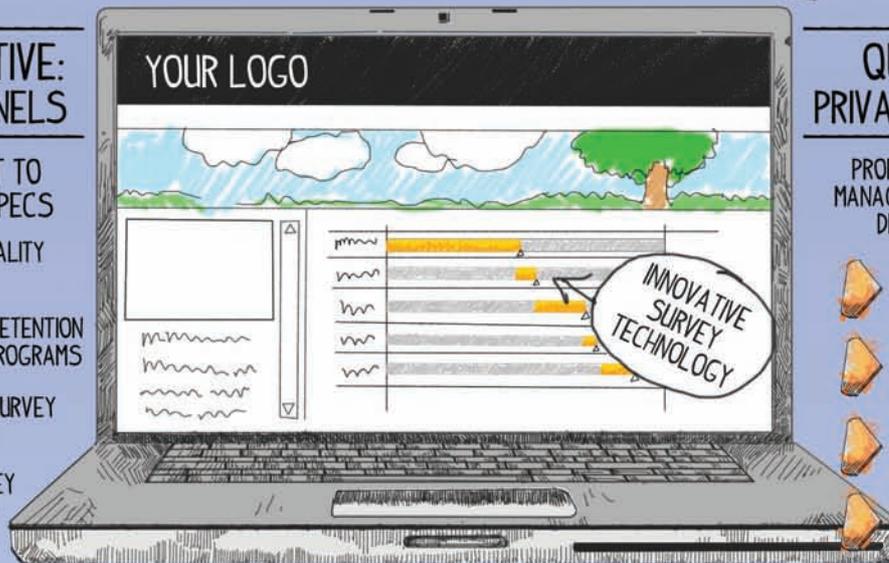
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- MOBILE SURVEY CAPABILITIES

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41

**MARKETVISION
RESEARCH INC.**
MV-Research.com

TYLER MCMULLEN, 41

TITLE President and CEO
EDUCATION M.B.A., University of Virginia

MarketVision Research Inc. (MVR), based in Cincinnati, is a private company founded in 1983.

U.S. revenue for 2010 was \$21.8 million, up 0.5% from 2009.

MVR is a full-service custom market-research firm with a focus on product-based research, including research into product and portfolio development,

- **Qualitative Research:** MVR has a team of moderators and qualitative research specialists as well as experienced client and project services teams. Moderators average more than 20 years of experience, and include both former client-side research directors and current RIVA teaching faculty members.
- **Viewpoint Forum:** The firm's Internet panel and research platform have an average cooperation rate of 50% to 60% and 90% recovery on home-use tests. Panelists are not permitted to sign themselves up to participate in the research; rather, MVR selects who is invited to participate.
- **MarketVision/Gateway:** MVR's dedicated interviewing facilities are located at the Universal Studios theme parks in Orlando, Fla., and Los Angeles. They provide a national sample to conduct product-based research, including taste tests. The facilities are noted for conducting in-person research among hard-to-reach groups such as families, adult men, teens and children.

In 2010, MVR developed enhanced wireless mobility and the use of iPads for respondent mobility and experience when interviewing consumers at Gateway research center in Universal Studios Florida. The firm continued to add experienced professional staff and capabilities to expand the healthcare and pharmaceutical practice areas.

MVR employs 96 full time and has five client service

offices, two qualitative research facilities, a research call center and two in-person data collection centers.



42

THE PERT GROUP
ThePertGroup.com

DALE LERSCH, 63

TITLE CEO
EDUCATION B.A., political science,
Wheaton College

The Pert Group (TPG), based in Farmington, Conn., is a privately held firm founded in 1978.

U.S. revenue in 2010 was \$21.7 million, up 32.3% from 2009.

TPG is a research-based consulting firm that integrates financial, attitudinal, market and behavioral information to bring clarity to business, brand and marketing decision making.

Providing comprehensive decision support in the areas of innovation, positioning and performance, TPG facilitates growth strategies and improves business outcomes for local, national and international clients. The firm specializes in CPG, restaurant, hospitality, insurance, finance, manufacturing, healthcare, agriculture and animal health.

Providing a full range of qualitative, quantitative and secondary research capabilities, TPG has more than 30 unique or proprietary approaches to support its clients' strategic insight needs. These services include:

- Market diagnostics to draw insights from data sources other than primary research including secondary, industry experts, social media and company data.
 - Qualitative research to explore unmet needs, emotional connections and reactions to new ideas and concepts through IDIs, focus groups, ethnography and online qualitative methods (video diaries, bulletin boards and communities), while also characterizing target populations and developing hypotheses that then would be quantified.
 - Quantitative research to measure equity and affinity of brands, products and services, and explore causality.
 - Strategic activators to activate insights within and throughout the client organization based on the goals of the company.
- In 2010 internal departments were redesigned organizationally to support

growing client needs, including the creation of a market analytics team and a formalized market analytics process, as well as a strategic resource group that works with clients to activate insights gleaned through research initiatives.

In April 2011, TPG opened a London office to expand its international reach. The firm has offices in Farmington and Stamford, Conn.; Kansas City, Mo.; and Pittsburgh. It employs a staff of 93 full time.



43

RENTRAK CORP.
Rentrak.com

WILLIAM L. LIVEK, 56

TITLE CEO
EDUCATION B.S., business administration,
Southern Illinois University

Rentrak Corp., based in Portland, Ore., was founded in 1977 and is a public company listed on Nasdaq.

U.S. research-only revenue for 2010 was \$21.3 million, up 45.8% from 2009. In 2010, 33.2% of total research-only revenue, or \$10.6 million, was from outside the United States. The growth rate for 2009 and 2010 excludes the 2010 revenue from the acquisition of Nielsen EDI in January 2010. Rentrak's total research and nonresearch revenue in 2010 was \$97.4 million.

Rentrak is a global media measurement and research company providing content measurement, analytical services and insights to the entertainment industry.

The firm measures theatrical gross receipts from across the world in real time, as well as from TV set-top box transactions for video on demand (VOD) (from more than 80 million TV set-top devices) and linear TV (from 17 million televisions). These measurements, along with the firm's software and progressive technology, are used by Hollywood film studios, national cable networks, local broadcast stations, advertising agencies, and mobile and Internet TV providers to help understand audiences and fine-tune ad buys.

Rentrak's product and services include:

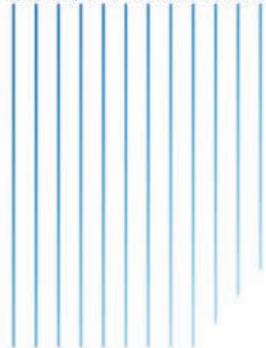
- **Theatrical:** Box Office Essentials measures 90% of the global box office receipts.
- **Home Video:** Studio Revenue Share Essentials tracks performance of home entertainment products leased directly to video retailers or through Rentrak's Pay-Per-Transaction program. Home Video Essentials provides title-level, weekly home entertainment, DVD and video game rental transactions throughout the United States and Canada with more than 1 billion transactions yearly. Retail Essentials delivers U.S. and Canadian home entertainment sell-through data for DVD and Blu-ray discs while providing weekly and historical market-level sales data, and detailed data on individual titles.
- **Television:** OnDemand Essentials provides VOD TV reporting and research, offering daily, census-level VOD data from set-top boxes. TV Essentials provides audience metrics for linear, VOD, DVR and interactive TV using data from 17 million U.S. TVs, while offering access to viewing data for all networks, series and telecasts. StationView Essentials is a TV measurement and analytical service that provides second-by-second viewing detail at the U.S. station level.
- **Mobile:** Mobile Essentials measures on-demand content (mobile Web, video clips, games, ringtones, wallpaper, music downloads and SMS messaging) accessed from mobile devices.



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- **Broadband:** Internet TV Essentials processes ad-supported online TV content data from various disparate sources and aggregates the data into a format consistent with TV industry standard metrics and reporting. Digital Download Essentials is a reporting and auditing service that provides content performance intelligence on purchased and rented movie and TV content downloaded or streamed via the Internet in the United States.

Following an agreement with DISH Network and Charter in 2010, Rentrak's TV Essentials (TVE) audience measurement service became a fully integrated system of detailed satellite, telco TV and cable viewing information from more than 17 million televisions nationwide, offering continuous TV media measurement in all 210 U.S. TV markets. In 2011, as more research databases will continue to be added, TVE will be directly matching viewing households to hundreds of household characteristics from Epsilon, a leading provider of direct marketing information.

The firm employs 117 full time in its research-only activities in the United States.



44

PERYAM & KROLL RESEARCH CORP.
PK-Research.com

BEVERLEY J. KROLL, 82

TITLE Founder, president and CEO
EDUCATION M.S., management, National Lewis University

Peryam & Kroll Research Co. (P&KR), based in Chicago, is a privately held firm founded in 1957.

U.S. revenue for 2010 was \$20.1 million, up 31.4% from 2009.

P&KR is a full-service market research firm providing qualitative and quantitative services with a special experience in sensory techniques, question design, scaling methods, and custom and experimental design. The company has a history of contributions to the field of response measurement, having been the developers of the original nine-point Hedonic scale and a version of that scale for testing children.

P&KR serves a variety of industries, including the food, beverage, alcohol, household product, flavor, fragrance and cosmetics industries.

The firm partners with its clients throughout the United

States and internationally by providing qualitative and quantitative research services that meet product and brand development objectives. To that end, it provides a wide range of services: early-stage consumer understanding research, product research guidance testing, category appraisals, product optimization, product quality audits, claim substantiation, in-home use studies, product and concept fit studies, and more.

P&KR's sensory testing experience provides an understanding of the product attributes that drive consumer interest. The firm uses its data modeling tools to identify optimal product or service designs, taking the underlying market segmentation into account.

The firm supports its comprehensive array of consumer research services with computerized call centers, focus suites, industrial and residential kitchens, and a national database of consumers. It recently completed a large-scale expansion and upgrade of its focus facility in the Chicago location, as well as the completion of a new state-of-the-art call center.

P&KR has a staff of 110 full-time employees, including project directors, information systems specialists, food scientists, statisticians, psychologists and 157 part-time employees, which include food technicians, call center staff, clerical staff and others. The firm has facilities in Dallas, Los Angeles and New York.



45

MARKET PROBE INC.
MarketProbe.com

T.R. RAO, 69

TITLE Founder and president
EDUCATION Ph.D., marketing, Michigan State University

Market Probe Inc. (MPI) in Milwaukee is a privately held company founded in 1976.

U.S. revenue for 2010 was \$19.8 million, up 8.7% from 2009. In 2010, 56.7% of total revenue, or \$25.9 million, was from outside the United States. The growth rate excludes 2009 and 2010 revenue from the acquisition of the Pharmaceutical Research Group (PRG) unit of Maritz Research in July 2009.

MPI is a full-service global marketing research and consulting firm specializing in stakeholder measurement engagements and a wide array of custom research techniques. The firm also is a global leader in the agriculture, animal health and horticulture sectors.

MPI companies span North America, Europe, Southeast Asia, the Middle East, India and China. With the acquisition of PRG, the firm expanded into serving traditional pharmaceutical companies and diagnostic equipment makers, in addition to manufacturing and service providers.

The firm's U.S. operations are grouped into client service teams focused on different sectors. There are also three support divisions: marketing sciences, data acquisition services and information technology.

MPI's engagements include customer satisfaction and loyalty research, employee equity research, brand management and tracking, new product development, and custom research and consulting services. In the last 12 months, it embarked on several new directions:

- **Customer Advocacy:** MPI introduced a new contemporary framework as part of the continuum in customer research from satisfaction, to loyalty, to recommendation, to advocacy. Advocacy is a multi-item index with strong linkage to business performance for both B-to-C and B-to-B clients.
- **Advocacy Monitor:** In 2010, the firm started Advocacy Monitor to judge the performance of the top 15 retail banks in the United States, with regional award winners identified. The 2011 monitor will be expanded to regional banks and the top Canadian banks, as well as to other countries and sectors such as technology services.
- **Brand Advocacy:** MPI has introduced a new model linking customer experience, brand advocacy and customer advocacy. Results are being reported for both B-to-C and B-to-B clients.

MPI is committed to building advocacy as the new research platform for market growth of any business integrating stakeholder research. In international markets, it established partnerships to do joint work and share in the benefits. These exclusive partnerships are set for Argentina, Poland, Russia, Mexico and Brazil to expand the firm's customer satisfaction reach, and additional partnerships will be set for 2011.

The firm's new e-Suite of reporting tools provides three Web-based reporting products that are accessible via the Internet 24/7. It includes Executive Dashboard, Insight Manager and Cyber Analyst, all of which are user-friendly. They all include a set of reporting features and the ability to customize these services. They also all take advantage of several existing programs including PowerPoint, Excel and Adobe.

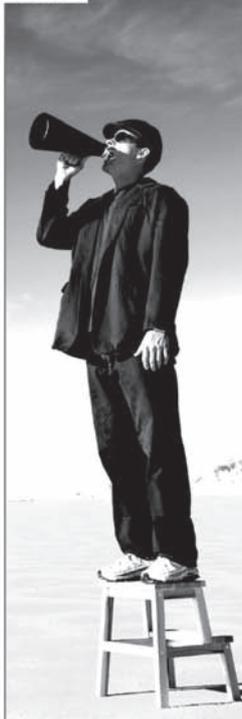
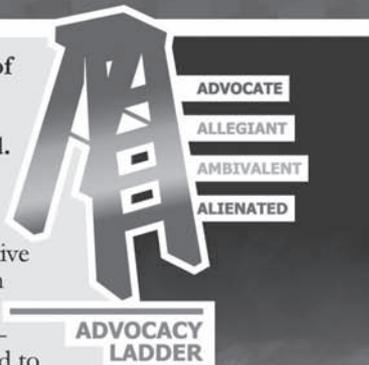
LINK CUSTOMER INSIGHTS TO BUSINESS PERFORMANCE

SHARE+
MOVE CUSTOMERS UP THE ADVOCACY LADDER

Advocacy represents the highest level of customer involvement in your brand – emotional connection with your brand and enthusiastic support of your brand.

Based on the level of customer involvement, **SHARE+** classifies your customer base into four groups on an Advocacy Ladder, offering the most effective segmentation scheme in the industry. Each segment calls for different actions to help build more advocates of your brand – of your business – and reduce the alienated to achieve your growth objectives.

Market Probe has pioneered an effort to operationalize customer advocacy as a distinct metric to advance the field of customer satisfaction research. This multi-item index, defining advocacy at a respondent level, provides businesses with the means to measure it, track its performance and help direct specific action plans to enhance customer experiences. This new advocacy framework is available under Market Probe's **SHARE+** program, focusing on your business growth.



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MPI operates more than 550 in-house CATI stations among its call centers in the United States, Canada, the United Kingdom, India, Dubai, Beijing and Singapore. Nearly three-fourths of these stations operate on a common software platform, Voxco, across countries to achieve economies of operation. MPI maintains partnerships with field agencies throughout the world to expand the services they can provide.

There are seven full-service offices and consultant offices in the United States plus subsidiary offices in Toronto, London, Brussels, Paris, Dubai, Bahrain, Singapore, Hong Kong and Beijing. MPI India has offices in Mumbai, Bangalore and New Delhi.

The firm employs more than 300 full-time employees worldwide, including 80 in the United States.



46

ALPHADETAIL INC.
AlphaDetail.com

RISHI VARMA, 37

TITLE CEO

EDUCATION M.S., industrial engineering, Stanford University

AlphaDetail Inc., based in San Mateo, Calif., is a privately held firm founded in 2001.

U.S. revenue for 2010 was \$18.6 million, up 30.1% from 2009.

AlphaDetail focuses entirely on healthcare market research. It concentrates on shaping global healthcare R&D and marketing decisions through strategic market insight. Its clients are among the world's largest global pharmaceutical companies and the firm focuses on global research in markets including the more developed

pharmaceutical markets in Europe and Asia, as well as many emerging markets.

The firm has developed a set of quantitative research offerings, including:

- ATU / Tracking keeps clients up to date on the pulse of a product's therapeutic category from pre-launch to post-levels-of-evidence (LOE) AlphaDetail's AlphaMonitor technology is a powerful, portfolio-wide tracking solution that allows clients to access core metrics at the click of a button.
- KOL Identification and Mapping helps clients identify, profile and partner with leaders in the field leveraged by AlphaDetail's KOLOR portal.
- Early Stage Candidate Valuation helps clients understand how a new product may fare in an uncertain future marketplace and make clinical trial design, formulation and pricing decisions.
- Segmentation helps clients create, develop and measure the impact of distinct actionable strategies for key segments within a target audience.
- Message and Concept Testing helps clients develop impactful promotional materials.
- LOE-focused Offerings (pre- and post-LOE strategies) help clients maximize the value of brands approaching LOE and those facing generic competition.
- Licensing Deal Valuation helps clients conduct rapid quantitative research to value in-licensing or out-licensing opportunities.
- Line Extension Valuation and Forecasting helps clients forecast the incremental value of line extensions, including new indications and formulations.

In 2010, AlphaDetail made advances in discrete choice techniques, ATU/Tracking supported by the AlphaMonitor Web-based portal and new product enhancements in KOL mapping that more closely integrate multiple sources of information.

AlphaDetail has 53 full-time employees in the United States.



47

Q RESEARCH SOLUTIONS INC.
QResearchSolutions.com

PATTI NELSON, 50

TITLE

Founder and CEO

Q Research Solution Inc. (QRS), based in Old Bridge, N.J., is a privately held firm founded in 1983.

U.S. revenue for 2010 was \$17.3 million, up 9.5% from 2009. In 2010, 1.1% of total revenue, or \$0.2 million was from outside the United States.

QRS is a full-service consumer marketing research firm focusing exclusively on the CPG industry. It assists the product development cycle, whether through opportunity identification, product and concept development or product evaluation.

The firm specializes in sensory research with a focus on the fragrance, food and beverage, household and personal care industries. Its innovation and design team is dedicated to developing advanced methodologies that gain maximum consumer insights.

QRS offers:

- Mind Navigator: A holistic approach that reveals the mind of the inarticulate consumer.

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The Who's Who in marketing research...

THE HONOMICHL GLOBAL TOP 25 REPORT

on the largest marketing research companies in the world

Issue date: August 30, 2011

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- Hemisphere: An offering that provides taste and fragrance developers with guidance on how to best communicate the qualities of products.
- Q Link: A critical examination into product differentiation that also measures the cohesiveness of a product profile.

As pioneers in high-tech ventilation booths and adaptable household rooms, QRS maintains leadership with its newest global and mobile approach to fragrance evaluation. The firm's partnership program, QSOS, offers R&D departments flawless execution, accurate data collection and timely analysis.

QRS provides coverage in the United States, Europe, Asia Pacific, South America and Mexico.

The firm employs 75 full time in the United States.



48

GONGOS RESEARCH INC.
Gongos.com

JOHN GONGOS, 51

TITLE President and CEO
EDUCATION M.B.A., University of Cincinnati

Gongos Research Inc. (GR), based in Auburn Hills, Mich., is a privately held company founded in 1991.

U.S. revenue for 2010 was \$17.2 million, up 30.3% from 2009.

GR is a full-service marketing research firm with a strategic focus on leveraging technology to enhance research. The firm has developed several key innovations, most notably i°Communities, ConsumerView and its recent i°Communities mobile app.

The firm works with Fortune 500 companies across the United States, collaborating to create optimum strategies for its clients to support qualitative and quantitative research objectives.

GR's Research Innovation & Technology (RIT) and Marketing Sciences teams work with the company's four research practice areas: consumer products, retail and services, financial and diversified, and transportation and technology. The RIT team refines and enhances technology-driven platforms and solutions, and is proactive in developing new ways to engage consumers in research. The Marketing Sciences team provides a blueprint for deep and integrative analysis, building a holistic view of the consumer.

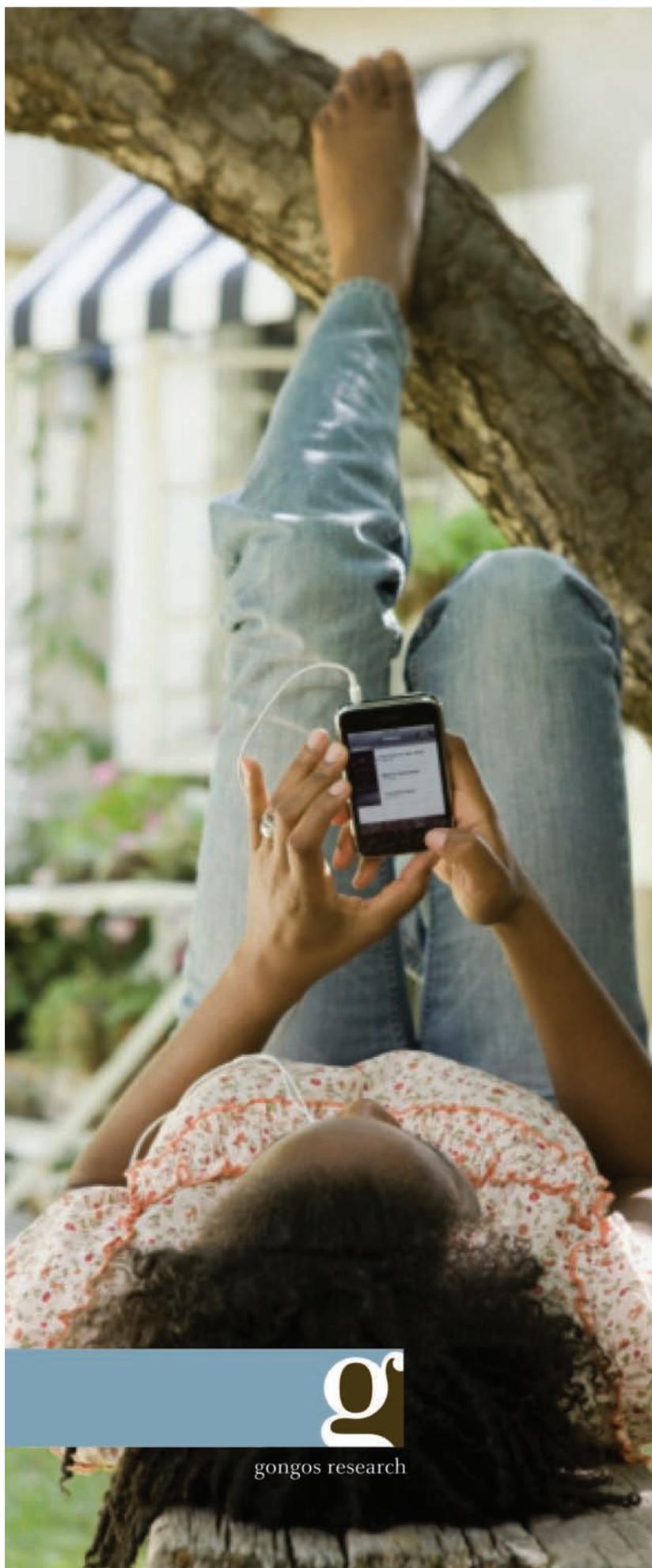
The Gongos Research suite of proprietary products includes:

- i°Communities: Private, custom research communities.
- metaCommunities: Larger-scale i°Communities that allow for multiple products, brands, consumer segments or countries.

- Consumer Village: An internal metaCommunity of 26,000 active members, enabling multiple companies to conduct quick-turnaround, ad hoc studies.
- i°Communities mobile: An app-based extension of the research community experience, currently running on the Apple iOS.
- ConsumerView: A webcam-based focus group

platform, including recruiting, hosting, stimuli and video streaming, archiving and full back-end support.

- goJournals: Online diaries for longitudinal studies.
- Active Intercept: A live-chat feature integrated into online surveys.



In the market.
On the road.
At the ball game.

Isn't it time to reach consumers where they are?

Mobile not only offers degrees of freedom beyond online research, but our recent study proves smartphone-based surveys are just as valid. Consumers are ready to answer questions where they are. We'll help you understand when it makes sense in your research mix.

gongos Mobile
Where consumers go, we go™

Auburn Hills, Michigan
248.239.2300 gongos.com
firststep@gongos.com

Ask us about ConsumerVillage Airwaves
a community of people on the go



gongos research

In addition to developing new platforms and tools, GR continues to strengthen in-person techniques such as focus groups and central location testing, and other foundational approaches to research.

In guiding product and service development, it utilizes methodologies such as concept development and testing, voice of the customer, product testing, and price and feature optimization. Its consumer immersion techniques provide in-store research to support a number of retail-based initiatives. GR also offers a wide range of research methodologies to help drive marketing decision making, including exploring emotional connections, segmentation and positioning.

The firm's focus for 2011 is to infuse innovative thinking throughout the entire organization; extend its i°Communities mobile app beyond Apple's iOS; complete extensive research on research comparing mobile and online surveys; and develop ways to integrate social media into its community offerings.

GR has 93 full-time employees.



49

AFFINNOVA INC.
Affinnova.com

WALEED AL-ATRAQCHI, 47

TITLE President and CEO
EDUCATION M.B.A., Tepper School of Business, Carnegie Mellon University

Affinnova Inc., based in Waltham, Mass., is a privately held company founded in 2000.

U.S. revenue for 2010 was \$17.0 million, up 26.9% from 2009. In 2010, 20.2% of total revenue, or \$4.3 million, was from outside the United States.

Affinnova provides optimization and measurement products to assist clients' marketing innovation processes. The firm's core technology uncovers the market potential of ideas by expanding the number of ideas that marketers can create and consumers can evaluate.

Affinnova is used by global Fortune 500 companies and their partners for optimization across product, advertising, design and line innovation. Companies from industries such as CPG, life sciences, retail and financial services use Affinnova to produce higher success rates, faster time to market and maximum ROMI.

The firm's core product, IDDEA, changes the throughput of the creative process by exploring a range of divergent ideas with a client's target consumers to identify the best idea. An interactive algorithm engages target consumers with ideas that compete with one another and are then tested to produce winners.

In 2010, Affinnova launched IDDEA II, which combines optimization with comprehensive benchmarking. The measurement module benchmarks optimized concepts against in-market competitors to identify market winners. Results from a year-long study show that 64% of client innovations using IDDEA produce optimized concepts that outscore their leading competitors.

Other offerings include:

- **2D Measurement:** A measurement service that combines monadic breadth of appeal with discrete choice intensity of appeal to measure top concepts against competitive benchmarks and deliver a holistic view of potential success.
- **Line SuperSet:** A discrete choice-based line optimization service that evaluates multiple new products against current and competitive products to optimize assortment and support new item sell-in.
- **Price Advantage:** A discrete choice pricing service that

maps and models consumer preferences for current products in various price and offering scenarios.

- **Advanced Conjoint:** For studies requiring a simulator deliverable, Affinnova conjoint features a respondent interface that allows the highest levels of engagement while enabling the most advanced conjoint models available.

In the first quarter of 2011, the firm announced a new division dedicated to life sciences and plans to continue expansion into Europe via its office in London.

Affinnova employs 97 full time in the United States.



50

RTI MARKET RESEARCH & BRAND STRATEGY
RTiResearch.com

DAVE ROTHSTEIN, 44

TITLE CEO
EDUCATION M.B.A., University of Rochester

RTi Market Research & Brand Strategy in Stamford, Conn., is a privately held company founded in 1979.

U.S. revenue for 2010 was \$16.6 million, up 36.1% from 2009.

RTi is a global market research firm comprising seasoned research professionals who provide custom research services to a broad and diverse client base. It offers a combination of analytical skills and business savvy, and its services are aligned with client business objectives and brand-specific strategic priorities.

In addition to its offering of traditional research tools and methods, RTi has developed numerous specialized research products, including:

- **Construction Test:** Simultaneously optimizes all components of a new product. Using a new application of discrete choice methods, RTi provides an in-depth and holistic understanding of how all product components (taste, packaging, label graphics, brand name, etc.) work together—a superior approach to concept and product development.
- **Portfolio Manager:** Line Optimization Through Volumetric Modeling: Portfolio Manager is used to identify the best incremental volume items, least-negative volume impact for de-lists, and the best line-up if starting from scratch or re-launching. Its analytic model produces relative volume estimates for each and every possible line combination, which is a stronger directional indicator of potential sales and line profitability than a simple "reach" proportion.
- **Pathways:** This is one example of RTi's various quantitative-qualitative integrated methods. Using wireless audience response technology, quantitative and qualitative research can be combined in a single two-hour session. Clients watch in the back room as the quant data is instantly displayed; then they select specific respondents—based on the answers that the respondents just gave—to participate in the follow-up qualitative research. Iterative sessions maximize learning in a short period of time.

Throughout 2010, RTi delivered its growing series of Quick Courses, which provide education and professional development to corporate researchers in easy-to-digest one-hour seminars.

The firm has offices in three U.S. cities and employs 50 full time. **m**

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