

HONOMICHL 50

THE BIG PICTURE

Mixed bag of revenue growth in 2005

By JACK HONOMICHL

The U.S.-based commercial marketing/advertising/public opinion research industry enjoyed revenue growth in 2005, but that rate fell far short of the boom year of 2004. Specifically, over the 17-year period from 1988 to 2004, the industry’s annual revenue growth rate was 5.2%, adjusted for inflation. In 2004, that rate was 7.2%, and for 2005 it fell to 2.1%.

There were several main reasons for this decline. For one, this annual compilation is driven in large part by the fortunes of VNU NV, the huge Dutch conglomerate that includes ACNielsen and Nielsen Media Research, and a host of other marketing research units. In 2005, VNU’s U.S.-only revenue was up, but only by 3.8%, compared with 11.5% in 2004. Also, TNS saw its U.S. revenue go down last year, by 4.2%.

Finally, of the 50 largest U.S.-based firms, 19 saw revenue decline in 2005 or fail to grow enough to cover the year’s inflation rate (3.4%).

On the flip side, numerous firms saw revenue grow 10% or more. It seems safe to hypothesize that, to some degree, the growth they enjoyed was at the expense of competitors.

As usual, these individual firm growth rates have been adjusted to eliminate, as much as possible, artificial growth stemming from acquisitions. If a firm made one or more acquisitions during 2004 or 2005, the acquired firm’s revenue was either not considered or was included in full for both 2004 and 2005—thus eliminating

“hype” from acquired revenue. Such adjustments are to be found in the individual firm profiles in this section.

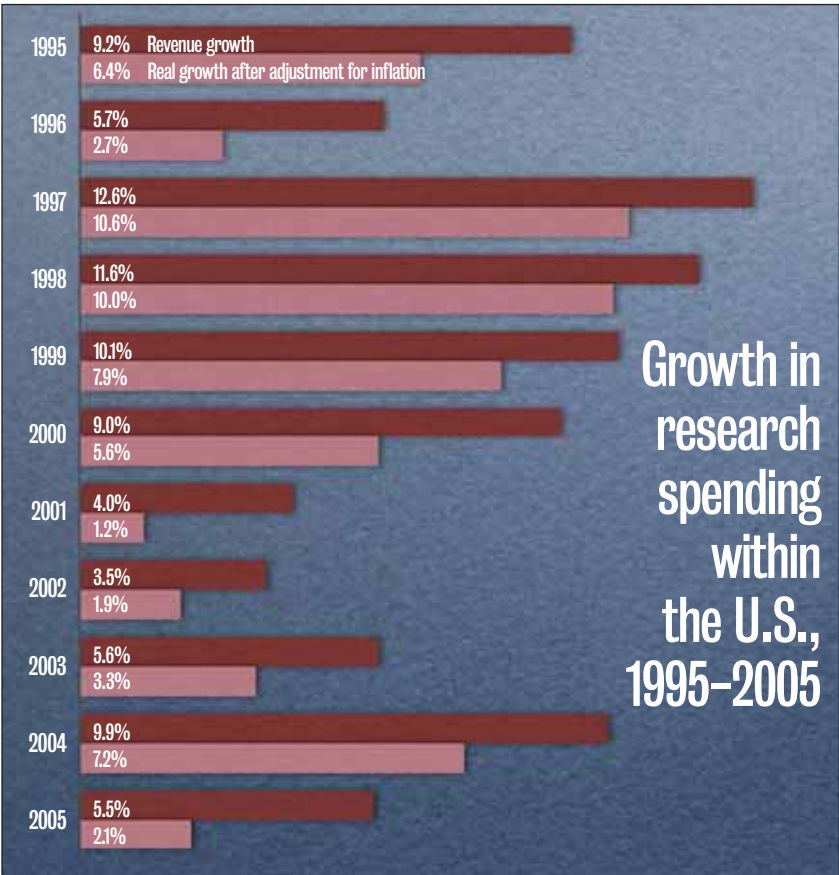
Also, as usual, third-party verification is required for revenue claims. There were in 2005 two exceptions: J.D. Power and Associates and The Kantar Group, because their parent companies will not make exact revenue public. But I believe the estimates used here are close to the truth of the matter.

These, then, are the main findings from this, my 33rd annual industry review prepared exclusively for *Marketing News*.

New revelations

You will find two “firsts” this year: One is the number of full-time employees (U.S. only) at the 193 companies included in this analysis. That total is 34,616. In fact, of course, these firms provide employment for many more: part-time, or hourly, workers and those doing work that is outsourced, often to faraway places such as India and The Philip-pines.

The only add-on is the age and educational achievement of those executives that head the Top 50 organizations, although you’ll note when you read company profiles that some declined to furnish this information.



Two sources of data

This annual analysis is based on two bodies of data. One is an amalgamation of revenue—U.S.-only and worldwide—reported by the 50 largest U.S.-based marketing research organizations, which showed revenue of \$6.8 billion for calendar 2005 from operations within the United States, an increase of 5.3% over 2004, or

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THE INDUSTRY

Glut of M&A activity brings research along for the ride

By ALLISON ENRIGHT
Staff Writer

The research industry, historically, is not known for being nimble. But changes in the industries and clients they serve are propelling researchers to move more lightly on their feet, and become more flexible in how they design, sell and execute research. The reality is that the large con-

sumers of market research, including consumer packaged goods companies, retailers and service firms, have been playing the merger and acquisitions game, causing a ripple effect in the industries that serve them. When Cincinnati-based Procter & Gamble Co. acquired Boston-based Gillette Co. last year, for example, the market research industry lost a major global account. The ever-growing clients wield more clout and make more

demands of research providers, who find they need to change to remain competitive. Indeed, client demands for full-service international capabilities and more favorable pricing models have compelled the market research industry to embark on an M&A play of its own. And the value of the research business is hardly insignificant, with a global value of more than \$21 billion and climbing, according to ESOMAR

estimates. Globally, market research M&A activity has been rampant: There were 80 transactions in 2005, 36 of which were based in the United States, each with an average value of \$6 million. Five years ago there were 55 transactions; 10 years ago there were only 22 worldwide, according to industry newsletter *Inside Research*. “The merger and acquisition activity

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THE TOP 50

U.S. rank 2005	U.S. rank 2004	Organization	Headquarters	Web Site: WWW.	U.S. research revenue¹ (\$, in millions)	Percent change from 2004²	Worldwide research revenue¹ (\$, in millions)	Non-U.S. research revenue¹ (\$, in millions)	Percent non-U.S. revenue	U.S. full-time employees
1	1	VNU NV	New York	vnu.com	\$1,864.0	3.8%	\$3,537.9	\$1673.9	47.3%	11,211
2	2	IMS Health Inc.	Fairfield, Conn.	imshealth.com	634.3	7.1	1,754.8	1120.5	63.9	1,700
3	6	The Kantar Group	Fairfield, Conn.	kantargroup.com	439.2*	6.7*	1,237.2*	798*	64.5*	2,300*
4	3	Westat Inc.	Rockville, Md.	westat.com	420.4	5.7	420.4	—	—	1,835
5	5	Information Resources Inc.	Chicago	infores.com	409.0	2.9	625.0	216.0	34.6	1,596
6	4	TNS U.S.	New York	tns-global.com	379.5	-4.2	1,818.6	1439.1	79.1	2,252
7	—	GfK AG USA	Nuremberg, Germany	gfk.com	316.3	3.9	1,313.5	1009.2	76.8	1,028
-	15	GfK Group USA	Nuremberg, Germany	gfk.com	109.0	6.6	—	—	—	—
-	8	NOP World US	New York	gfk.com	207.3	2.6	—	—	—	—
8	7	Arbitron Inc.	New York	arbitron.com	297.6	3.8	310.0	12.4	4.0	919
9	9	Ipsos	New York	ipsos-na.com	226.2	11.2	893.7	667.5	74.6	679
10	10	Synovate	Chicago	synovate.com	216.5	11.0	601.5	385.0	64.0	838
11	13	Maritz Research	Fenton, Mo.	maritzresearch.com	164.2	22.5	207.1	42.9	20.7	415
12	11	Harris Interactive Inc.	Rochester, N.Y.	harrisinteractive.com	162.2	4.8	208.8	46.6	22.3	733
13	12	J.D. Power and Associates	Westlake Village, Calif.	jdpower.com	152.2*	14.0*	198.2*	46.0*	23.2*	630
14	14	The NPD Group Inc.	Port Washington, N.Y.	npd.com	128.3	14.6	161.1	32.6	20.2	700
15	16	Opinion Research Corp.	Princeton, N.J.	opinionresearch.com	94.2	3.0	150.6	56.4	37.5	550
16	17	Lieberman Research Worldwide	Los Angeles	lrwonline.com	65.8	-2.1	75.7	9.9	13.1	318
17	18	Abt Associates Inc.	Cambridge, Mass.	abtassociates.com	52.2	25.8	52.2	—	—	200
18	21	comScore Networks Inc.	Reston, Va.	comscore.com	44.9	19.7	50.5	5.6	11.1	277
19	19	Market Strategies Inc.	Livonia, Mich.	marketstrategies.com	43.0	13.5	44.5	1.5	3.4	175
20	—	MVL Group Inc.	Jupiter, Fla.	mvlgroup.com	38.7	10.6	38.7	—	—	106
21	20	Burke Inc.	Cincinnati	burke.com	37.1	NC	42.8	5.7	13.3	198
22	23	OTX	Los Angeles	otxresearch.com	33.2	11.4	33.2	—	—	134
23	26	Directions Research Inc.	Cincinnati	directionsresearch.com	33.1	21.3	33.1	—	—	115
24	23	Knowledge Networks Inc.	Menlo Park, Calif.	knowledgegenetworks.com	31.4	5.4	31.4	—	—	180
25	22	MORPACE International Inc.	Farmington Hills, Mich.	morpace.com	29.3	-5.8	34.3	5.0	14.6	142
26	27	National Research Corp.	Lincoln, Neb.	nationalresearch.com	28.7	5.2	32.4	3.7	11.4	127
27	25	ICR/Int'l Communications Research	Media, Pa.	icrsurvey.com	28.3	-2.4	28.9	0.6	2.1	151
28	—	Experian Research Services	Deerfield Beach, Fla.	smrb.com	23.5	29.1	23.5	—	—	80
29	31	National Analysts Inc.	Philadelphia	nationalanalysts.com	23.3	4.5	23.3	—	—	77
30	37	Data Development Worldwide	New York	datadw.com	22.6	23.5	22.6	—	—	85
31	29	Lieberman Research Group	Great Neck, N.Y.	liebermanresearch.com	22.4	-10.8	23.3	0.9	3.9	76
32	36	Flake-Wilkerson Market Insights LLC	Little Rock, Ark.	mktinsights.com	22.0	17.0	22.0	—	—	81
33	30	Peryam & Kroll Research Corp.	Chicago	pk-research.com	20.7	-8.0	21.0	0.3	1.4	104
34	—	MarketCast	Los Angeles	marketcastonline.com	20.4	25.2	20.4	—	—	27
35	35	C&R Research Services Inc.	Chicago	crresearch.com	20.1	2.0	20.1	—	—	93
36	33	Walker Information	Indianapolis	walkerinfo.com	20.0	-2.0	23.8	3.8	16.0	159
37	41	Schulman, Ronca & Bucuvalas Inc.	New York	srbi.com	19.3	8.5	19.3	—	—	135
38	—	Guideline Inc.	New York	guideline.com	18.6	-2.3	18.6	—	—	92
38	50	Phoenix Marketing International	Rhinebeck, N.Y.	phoenixmi.com	18.6	14.1	18.6	—	—	64
40	34	The PreTesting Co. Inc.	Tenafly, N.J.	pretesting.com	17.5	-11.6	18.1	0.6	3.3	46
41	—	Knowledge Systems & Research Inc.	Syracuse, N.Y.	ksrinc.com	16.1	10.3	19.8	3.7	18.7	195
42	45	Ronin Corp.	Princeton, N.J.	ronin.com	15.5	11.5	15.9	0.4	2.5	60
43	42	Market Probe Inc.	Milwaukee	marketprobe.com	15.1	7.2	26.4	11.3	42.8	77
44	39	RDA Group Inc.	Bloomfield Hills, Mich.	rdagroup.com	14.7	-4.5	17.6	2.9	16.5	92
45	43	Savitz Research Companies	Dallas	savitzresearch.com	14.4	2.9	14.4	—	—	50
46	38	Cheskin	Redwood Shores, Calif.	cheskin.com	13.4	-18.8	15.6	2.2	14.1	59
46	41	Marketing Analysts Inc.	Charleston, S.C.	marketinganalysts.com	13.4	-11.8	14.4	0.8	5.6	36
48	32	Public Opinion Strategies	Alexandria, Va.	pos.org	13.1	-38.2	13.2	0.1	0.8	32
49	46	MarketVision Research Inc.	Cincinnati	marketvisionresearch.com	13.0	10.2	13.0	—	—	60
50	47	RTI-DFD Inc.	Stamford, Conn.	rti-dfd.com	12.7	10.4	12.7	—	—	41
Total					\$6,780.2	5.3%	\$14,373.7	\$7,605.1	52.9%	31,330
All other (143 CASRO companies not included in the Top 50)³					\$723.2	7.5%	\$818.8	\$95.6	11.7%	3,286*
Total (193 companies)					\$7,503.4	5.5%	\$15,192.5	\$7,700.7	50.7%	34,616

* Estimated by Top 50 ¹ U.S. and worldwide revenue may include nonresearch activities for some companies that are significantly higher. See individual company profiles for details. ² 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. ³ Total revenue of 143 survey research companies that provide financial information on a confidential basis to the Council of American Survey Research Organizations (CASRO). Also, 34 of Top 50 companies have 38 CASRO members.



VNU NV, based in New York and Haarlem, the Netherlands, is a public company founded in 1964, and listed on the Amsterdam Stock Exchange. In May 2006, VNU was sold to a consortium of six U.S. private equity firms.

Rob van den Bergh, 56, is chairman of the Executive Board and CEO of VNU NV. He earned a Masters of Law from the University of Leiden, the Netherlands. Van den Bergh will stay with VNU until the search for his successor is completed.

U.S. research-only revenues in 2005 were \$1.9 billion, up 3.8% over 2004. In 2005, 47.3% of total research-only revenue, or \$1.7 billion, was from outside the United States. The growth rate includes 2004 and 2005 revenue for Audio Audit, acquired June 2005.

Revenue is from two of VNU's marketing

and media research units that include some nonresearch businesses, mostly information services. Worldwide research and nonresearch revenue for VNU NV was \$4.3 billion in 2005.

VNU is an international information and media company offering services in more than 100 countries and with nearly 41,000 employees. It has three main business groups: VNU Marketing Information, VNU Media Measurement & Information and VNU Business Information. VNU's MI and MM&I business groups include such market research units as ACNielsen and Nielsen Media Research. These two groups together employ 11,211 in the United States and 37,884 worldwide.

VNU Marketing Information (MI)

This business group incorporates ACNielsen (ACN) and also VNU Advisory Services, which includes Analytic Consulting, BASES, Spectra, Claritas and HCI.

ACN was founded in 1923 and acquired by VNU in February 2001. It provides services to more than 9,000 clients among consumer product manufacturers, retailers and sales agencies. Its services are used to make fact-based decisions about core business activities, including brand, category and sales management; consumer purchase dynamics; and strategic planning. Its products and services include:

◆ Retail Measurement Services (RMS): Provides continuous tracking of product sales to consumers based on information gathered

at the retail point-of-sale. Detailed information is provided on sales, market shares, distribution, pricing and merchandising and promotional activities. RMS information is available in more than 80 countries.

◆ Consumer Panel: Tracks the purchasing behavior of consumers in more than 265,000 households in 27 countries worldwide, primarily through the use of in-home scanners. Panel information reveals consumers' purchasing from all outlets they visit and provides insights into who is buying, methods of payment, use of coupons and participation in frequent shopper programs.

◆ Assortment and In-Store Space: Addresses issues such as shelf inventories, shelf space, category growth opportunities, product listings and how best to distribute merchandising information.

◆ Customized Research: Provides qualitative and quantitative measures of consumers' attitudes and purchasing behavior, customer satisfaction, brand awareness and equity, advertising effectiveness and other marketing issues.

◆ Retailer Services: Designed to help understand what attracts consumers to stores, and used to evaluate competitive performance; increase traffic and sales; leverage frequent-shopper data and build consumer loyalty; improve performance of private-label products; and understand results across all product classes and categories.

◆ Analytic Consulting: Addresses such issues as pricing, promotion, marketing mix, assortment and product rationalization, category placement, category structure and in-store, in-market auditing and testing.

◆ Decision Support: A wide range of software tools and delivery methods, from advanced analytical and data-management systems to standard reports that are automatically refreshed when databases are updated.

◆ Global Services: Coordinates with local ACNielsen offices throughout the world to deliver clear, consistent information across markets. Using consistent and comparable cross-country data combined with local country information, these services are provided worldwide.

Major 2005 highlights for ACN U.S. include completing the expansion of the Homescan MegaPanel to 125,000 households; launching TargetTrack, a tracking service covering cultural and ethnic groups in the United States; introducing Answers Interactive, a Web-based service for real-time analysis and enterprise-wide distribu-

tion of marketing information; launching Data Bank, a data management service to customize and harmonize data content from multiple sources; and introducing several retailer services that address such issues as optimizing store performance, tracking seasonal and special-event promotions, and monitoring trends and changes in consumer shopping behavior.

VNU Media Measurement & Information (MMI)

MMI is organized into four business units: Nielsen Media Research, NetRatings, Nielsen Entertainment and Media Solutions.

◆ Nielsen Media Research (NMR), based in New York, was founded in 1936 and was acquired in 1999 by VNU (www.nielsenmedia.com).

NMR's core business is providing television audience measurement information for broadcast and cable network and station executives, cable system and satellite service providers, program producers and distributors, and advertisers and their agencies. In the United States, the Nielsen TV ratings are the currency for more than \$60 billion worth of transactions each year between buyers and sellers of TV time.

U.S. national services provide viewership data generated from the National People Meter Sample. By mid-2006, NMR will conclude an expansion of its National People Meter sample, doubling it to 10,000 homes, measuring the viewing habits of some 26,000 persons. National service provides continuous TV audience estimates for national broadcast network, syndicated and cable TV programs. The service also provides national ratings data and existing advertising tracking and verification services to advertisers and advertising agencies.

NMR's local division provides local market TV audience measurement in all 210 Designated Market Areas in the United States. It provides measurement through the use of People Meters, set-tuning meters and diaries for local TV stations, agencies, advertisers and local cable outlets with 70% of U.S. spot TV receiving overnight ratings. Local People Meter service is available in nine markets and a 10th will be added in 2006. LPMs offer continuous metered measurement, including demographic data delivered daily. Set-tuning meters, now in 51 of the largest local markets, provide daily viewing information. There are 154 diary

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markets, and demographic information is collected from separate samples at least four times each year using the paper diaries.

Nielsen’s national and local Hispanic Services provide measurement services for Hispanic TV viewing and Spanish-language TV in the United States. Nielsen’s local Hispanic Service provides viewing information in 19 TV markets with significant Hispanic populations. A separate sample of Hispanic homes is measured in each market to reflect how Spanish-language use in the home affects TV viewing.

NMR also offers a variety of other services, including the Nielsen Monitor-Plus advertising intelligence service, Nielsen Sports Marketing Service and Internet and interactive media services.

Outside the United States, NMR offers a full range of services, including TV and radio audience measurement, print readership and customized media research services. The firm measures advertising expenditures, media placements and creative content in 30 of the world’s leading advertising markets. Through a network of affiliates, coverage is extended to more than 70 countries, representing 85% of the world’s advertising spending. The AGB Group and Nielsen Media Research International operate a joint venture that offers TV ratings in 30 countries, under the AGB Nielsen Media

Research brand.

Major 2005 U.S. highlights for NMR include: continued rollout of Local People Meter service to the Top 10 markets; launched A/P Meter technology in Nielsen’s samples; made continued progress on the expansion of the National People Meter sample to bring the sample size to about 10,000 households; and began integrating Audio Audit’s broadcast verification service with an existing and complementary service.

Nielsen Ventures, MMI’s new business development arm, introduced FanLinks, developed with ACN as a means to link consumers’ sports media consumption to product purchasing. MMI also continued to head VNU’s participation in the Project Apollo test with Arbitron Inc. Project Apollo is focused on developing a new marketing information service that will provide insight into the links between consumer media exposure and consumer purchasing. A test panel is underway in the United States that will consist of about 14,500 participants in 6,250 households.

◆ NetRatings Inc. (NR) in New York was founded in 1997, and became a public company in December 1999 with VNU owning 61% of its shares (www.nielsen-netratings.com).

NR delivers Internet media and market research services, marketed globally under

the Nielsen//NetRatings brand. N//NR provides Internet audience measurement and online advertising intelligence with its suite of products.

N//NR uses random digital dial (RDD) for Internet audience information, probing software to capture a volume of online ads, survey research to measure Web users’ lifestyle preferences, a panel of hundreds of thousands of Web surfers worldwide to report on transactional intelligence, and a census-based reporting system to tally the total circulation of a network or market and report on post-campaign analyses.

The firm provides technology-driven Internet audience information to ad agencies, advertisers, financial institutions and companies in the media, e-commerce, consumer goods companies and travel industries. Data-collection technology tracks users’ every click, purchase and application. Spidering technology delivers data on ad impressions and spending dollars by probing URLs more than 6 million times a week. Server-side technology supports a census-based reporting system that delivers the most accurate, in-depth site measurement information available.

N//NR products and services include:

- NetView*: Audience measurement.
- AdRelevance*: Advertising spending measurement.
- @Plan*: Demographic, in-depth lifestyle

and brand preference data.

- MegaPanel*: more than 1 million Internet users worldwide for transactions data.
- Homescan Online*: With ACN, offline buying and online surfing measurement.
- SiteCensus*: Server-side visit measurement and tracking.
- AdIntelligence*: Advertising creative tracking.
- WebIntercept*: Web surveys.
- WebRF*: Reach and frequency media planning tool.
- Analytical Services*: Custom research and analysis.

Major highlights for NetRatings include launching the MegaView Local Market service that reports on Web site traffic behavior and demographic data from the top 100 local markets, and introducing the AdRelevance Sponsored Search Link service to gain a complete competitive view, including market share comparisons between image-based and paid search advertising.

◆ Nielsen Entertainment (NE): Nielsen Film and Home Entertainment includes Nielsen NRG, NRG Independent, Nielsen EDI Domestic and International, Nielsen Interactive Entertainment, Nielsen Television and On Demand, Live Theatrical Events Nielsen VideoScan and Entertainment Marketing Solutions, Nielsen Book, Nielsen Music (Nielsen SoundScan, Nielsen Broadcast Data Systems, Nielsen Aircheck/Music Control) and Nielsen Mobile.

NE serves the entertainment industry, including the film, book, home entertainment, music and interactive segments in 16 markets worldwide with a broad range of consulting services, information and analytical tools. Its services include testing entertainment and promotional content, measuring sales results, tracking consumer entertainment trends in terms of overall spending and time spent and by segment, and providing custom research information. NE products and services include:

—*Film*: Nielsen EDI collects and provides box-office data from some 50,000 movie screens in 14 markets worldwide. Nielsen National Research Group (NRG) tests concepts, content, positioning and promotional materials, including video and DVD, and conducts test screenings.

—*Music*: Nielsen Broadcast Data Systems (BDS) monitors over-the-air music using pattern recognition technology to identify more than 1 million songs played on more than 1,100 radio stations in real time in 130 markets throughout the United States. Nielsen SoundScan tracks point-of-sale data from retail locations and online sources. Nielsen RingScan, launching this year, will measure ringtone downloads and other mobile data services.

—*Home Entertainment (Videos/DVDs)*: Nielsen VideoScan tracks sales of videos and DVDs via point-of-sale data from retail locations nationwide. VideoScan includes Nielsen Market Navigator, which combines point-of-sale data, box-office information, radio airplay data and consumer survey results with neighborhood-level demographic information.

Nielsen TV Services (NTS) and On Demand provides TV program and promotional spot testing from its research facilities in Las Vegas. NTS also produces online research for the testing of creative material.

—*Books*: Nielsen BookScan measures retail sales activity for the book industry via point-of-sale data from retail locations.

Major highlights for Nielsen Entertain-

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ment include: launching NRGi, a new service providing research services to the independent film industry and Live Theatrical Events, serving Broadway and live theater clients; launching Nielsen Mobile, with an initial focus on measuring cell phone ring-tone purchases in the United States; and introducing Nielsen SoundScan Digital Downloads information system and Music Charts, reporting digital sales information from 19 countries across Europe, provided by more than 110 different music sites.

- ◆ Media Solutions: This includes PERQ/HCI and Scarborough Research, and also Standard Rate & Data Services (SRDS) and Interactive Market Systems (IMS).
PERQ/HCI provides healthcare audience measurement and ad expenditure services to advertising agencies, publishers and advertiser companies in the United States. It is a media research line of business within media information provider SRDS.
From a respondent base of more than 11,000 physicians and healthcare professionals, PERQ/HCI measures healthcare journal readership within the medical/surgical, pharmacy, managed care, eye care, dental, radiology, nursing and veterinary markets. More than 34 healthcare specialties are studied.
Scarborough Research (SR), a joint venture between VNU and Arbitron, identifies local, regional and national shopping patterns and media usage of the American consumer. SR surveys 210,000 adults ages 18 and older on a variety of characteristics including: shopping, lifestyle, media and demographics. Measuring consumer behavior continuously throughout the year, SR releases data twice a year to clients. It serves advertisers and agencies, broadcast TV, cable systems, radio stations, newspapers, Internet, sports teams and leagues, and out-of-home companies.
SR products and services include:
 - 80 Top-Tier Local Market Studies: Conducted in major U.S. markets.
 - Mid-Tier Local Market Studies: Conducted in six DMAs.
 - Scarborough USA+: National study.
 - Multi-Market Study: Single study from 80 top-tier markets.
 - Ciudad Hispania de Scarborough: Hispanic study with sample of 32,000.
 - Gay/Lesbian Consumer Online Study: Through affiliation with OpusCom Group.
 - Custom Analytics: Tools for SR databases.
 - Consumer Tracker: Tool for monthly or quarterly reporting.
 - PRIME NexT: Data analysis software.

Major 2005 highlights for SR include expansion of its Top-Tier Local Market Studies to 80, launch of Mid-Tier Local Market Studies and introduction of its integrated newspaper audience ratings.



IMS Health Inc. (IMS) in Fairfield, Conn., was founded in 1954; acquired by Dun & Bradstreet Corp. in 1986, and became part of a separate public company, Cognizant Corp., in November 1996. In July 1998, IMS was spun off into a publicly traded company listed on the New York Stock Exchange.
David Carlucci, 51, is chairman and CEO of IMS. He earned a B.A. in Political Science at the University of Rochester.
U.S. revenue in 2005 was \$634.3 million, up 7.1% over 2004. In 2005, 63.9% of total revenue, or \$1.12 billion, was generated outside the United States. The growth rate

excludes 2004 and 2005 U.S. revenue from the 2005 acquisitions of SAI Healthcare, Synchronous Knowledge Inc., Areks, Pharmetrics, Evision and CORE. Total revenue for IMS in 2004 was \$1.75 billion.
IMS is the leading global provider of market information to the pharmaceutical and healthcare industries, providing services in more than 100 countries. IMS offers business intelligence products and services, including sales force effectiveness services, portfolio optimization capabilities, launch and brand management services, and managed care and consumer health offerings.

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EXCLUSIVE
HONOMICHL GLOBAL 25:
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MARKETING NEWS

Its Global Consulting and Services group provides insights that improve ROI and the delivery of health care worldwide.

Its business lines offer custom services that support the core business processes of virtually all pharmaceutical companies:

◆ Sales Force Effectiveness services are used principally by pharmaceutical manufacturers to measure, forecast and optimize the effectiveness and efficiency of sales representatives, to target the marketing and sales efforts of sales forces and to manage sales territories.

◆ Portfolio Optimization offerings are multinational integrated analytical tools and syndicated pharmaceutical, medical and prescription audits. They assist clients in identifying the optimal mix of products in their portfolios and pipelines and in resolving various strategic issues, including which therapy classes to enter, which products to develop and license, how to create the right marketing mix and how to identify the most promising acquisition targets.

◆ Launch and Brand Management offerings combine information, analytical tools, services and expertise to address client

needs relevant to each stage in the life cycle of their pharmaceutical brands. Offerings include forecast results, determine optimal strategies, design the right promotional mix, monitor uptake and identify needed corrections.

◆ Managed Care services provide an array of information to quantify the effects of managed care on the pharmaceutical and healthcare industries.

◆ Consumer Health services provide detailed product movement, market share and pricing information for over-the-counter, personal care, patient care and

nutritional products.

IMS's Global Consulting and Services teams support strategic planning and decision-making with a combination of information and analytics. Customized analysis and interpretation of business intelligence is offered in key practice areas: Pricing and Market Access, which uses information to formulate strategies for product pricing, reimbursement and market access; Product and Portfolio Development, which focuses on strategies for products 18 months or more prior to launch, as well as their lifecycle management; and Promotion Management, which assists with optimizing brand and franchise promotion spending and messaging.

The firm's Information Management consulting group helps organize, analyze and warehouse data assets from multiple sources related to their portfolios. In addition, its Client Services teams provide support services in product set-up, installation and implementation of IMS offerings, as well as client training and a variety of ongoing, post-sales services.

In 2005, IMS completed 10 acquisitions worldwide to expand capabilities in key areas, including health economics and outcomes, R&D competitive benchmarking and new offerings targeted to the U.S. government. In addition, IMS broadened its reach in the areas of Medicare and Managed Care, adding depth and breadth across its offerings.

IMS employs 6,900 professionals worldwide and 1,700 professionals in the United States.

3



SALAMA

THE KANTAR GROUP

www.kantargroup.com

The Kantar Group (TKG), based in Fairfield, Conn., and London, was founded in 1993 as the Information and Consultancy Division of WPP Group plc, a London-based public company.

Eric Salama, 45, is chairman and CEO of TKG. He earned an MSc at London's Birkbeck College.

U.S. research-only revenue in 2005 was estimated at \$439.2 million, up 6.7% from 2004. In 2005, 64.5% of total research-only revenue, or \$798.0 million, was estimated from outside the United States. The growth rate includes 2004 and 2005 revenue from acquisitions of Marketing and Planning Systems in July 2004, DaVinci Healthcare Partners LLC in August 2004, Consumer Health Sciences in March 2005 and Dynamic Logic in June 2005.

TKG's research businesses in the United States, with an estimated 2,300 full-time employees, include Millward Brown Group, Research International, The Ziment Group, Lightspeed Research and Mattson Jack Group.

Millward Brown Group
Millward Brown Group (MBG), based in

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

- ◆ Millward Brown (MB) (www.millwardbrown.com), providing a range of qualitative, quantitative and consulting services with respect to brands, marketing communications, media and marketing effectiveness. MB works across a wide range of industries and categories, including brand strategy and experience, creative development and campaign evaluation, consumer needs and values, media planning and strategy, ROI and forecasting and investment management, brand valuation and analytics through its MB Optimor unit, and demand and activation. Key products and services are:
 - Link*: Copy testing of all forms of advertising (TV, Print, Digital, Radio);
 - BrandDynamics*: Brand equity evaluation;
 - Dynamic Tracking*: Continuous tracking of key brand drivers;
 - D&A*: A framework for measuring; impact of demand generating and sales activation activities;
 - MBuzz*: Measurement of online and offline word-of-mouth;
 - AdIndex*: Impact of digital marketing activity;
 - Sales Response Modeling*: Isolating and

measuring marketing effects;

- Qualitative*: Qualitative research and focus group services;
- CIMS*: U.S. technology media usership.

In addition, MB Precis provides PR effectiveness metrics.

- ◆ Greenfield Consulting (www.greenfieldgroup.com) is a qualitative agency conducting focus groups and in-depth interviews for Fortune 500 companies globally, across both consumer and business-to-business sectors.
- ◆ Marketing and Planning Systems (www.mapsnet.com) is a strategic research company and consultancy that combines advanced marketing science with consultancy skills.
- ◆ Dynamic Logic (www.dynamiclogic.com) measures the impact of digital marketing initiatives and the role they play in the broader cross-media mix.
- ◆ The Focus Network (www.thefocusnetwork.com) is a network of eight focus group facilities, including a new facility in Chicago’s Merchandise Mart.
- ◆ Kantar Media Research (www.kantarmedia.com) is an integrated research, information and software group, specializing in marketing and media solutions, software data systems for data analysis and advanced analytical solutions. Key services are Television Audience Measurement (TAM); print and single source service through its Target Group Index (TGI) and MARS pharmaceuti-

cal product; software systems; and custom projects, including data fusion and database modeling.

- TGI and TAM services are available in more than 50 countries.

Research International

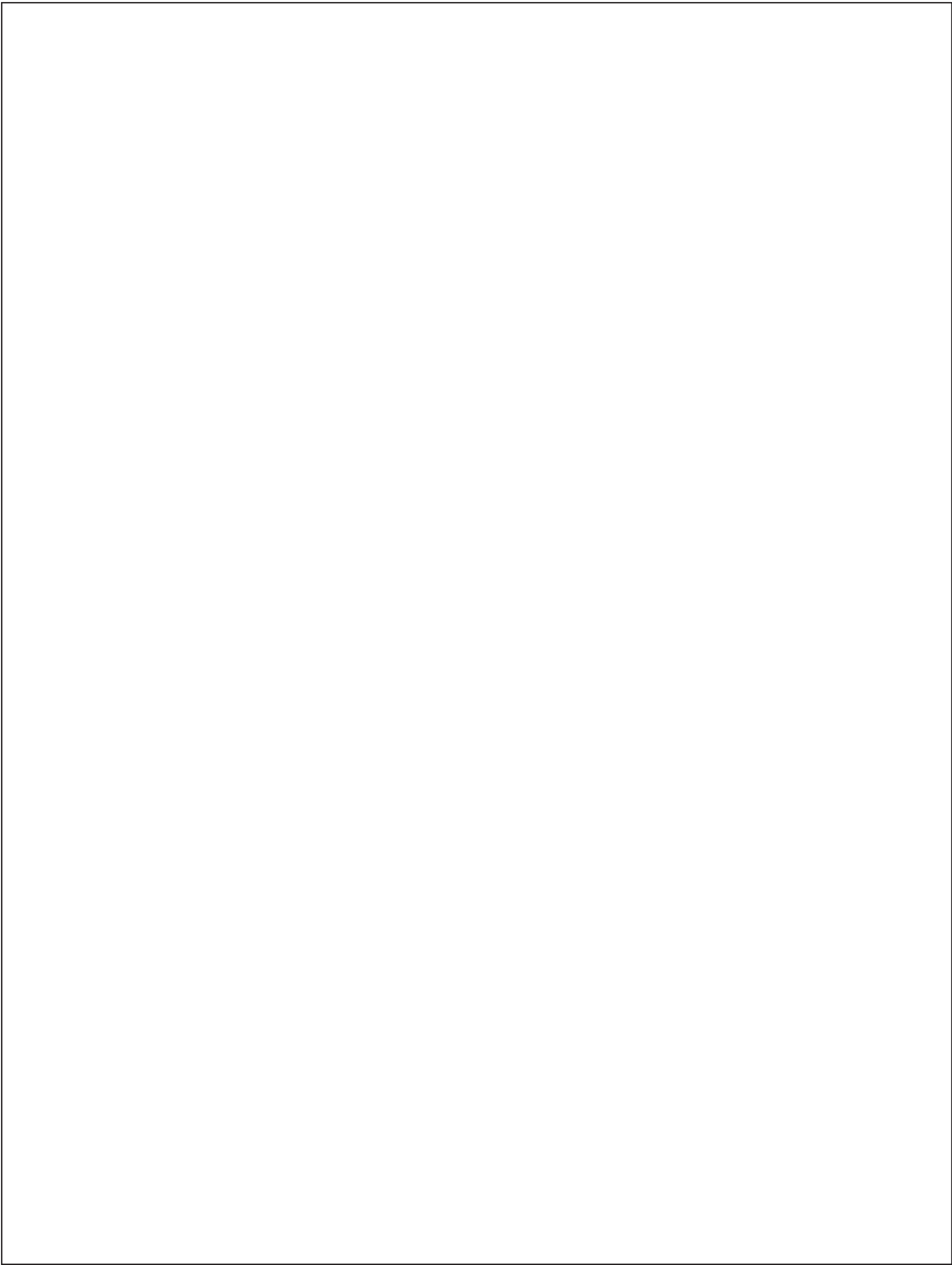
Research International (RI) was founded in 1973, and has been part of the WPP Group since 1989. It has offices in 57 countries, and its global headquarters are in London (www.research-int.com). RI Qualitatif is the group’s qualitative research arm. RI provides marketing knowledge created in response to individual client needs with answers to specific business problems, and generates insights into consumers and markets. It has experience in most major sectors, particularly consumer packaged goods, retail, new media, financial services, energy and utilities, technology and telecommunications. RI’s services are structured around six main practice areas: consumer understanding; branding and communication; innovation; channel management; new media; and customer relationships and service measurement. In each area, the services offered draw on the firm’s worldwide knowledge bases and include both custom approaches and its own techniques. Among the latter are Equity Engine (brand equity management), MicroTest (new product development and sales forecasting), BrandSight Gallery (an internationally validated visual system for exploring brand personality),

Locator (brand positioning optimization) and Loyalty Driver (evaluating and managing customer loyalty).

The Ziment Group

The Ziment Group (TZG), based in New York, was founded in 1976 and acquired by WPP in 2001 (www.ziment.com). The unit comprises four divisions: Ziment and WebSurveyResearch, Imap and Consumer Health Sciences. The company offers products to address a range of strategic marketing issues and also provides e-healthcare support, Internet research and multivariate services. Its products include:

- FROM COMPOUND TO PROFIT*: a range of research services to take drugs from Phase II to market launch and beyond;
- IDEAZ*: ideation research;
- TRIALZ*: an approach to optimal phase III clinical trial endpoints;
- SEGZ*: market segmentation research;
- ZAPP*: Ziment Associates’ playbook for positioning and messaging research;
- TAGZ*: a new approach to segmentation to assist marketing pharmaceutical products to physicians;
- MDS*: Market Dynamics Studies for continuous market tracking to monitor brand and competitive performance;
- PAYZ*: a suite of three approaches to



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pricing research; and
—*RxOI*: market mix modeling of secondary and primary data to measure the ROI of marketing investments.

WebSurvey Research provides access to a panel of healthcare professionals dedicated to participating in research through the Internet. WebSurvey’s panel has more than 75,000 participating physicians. Ziment also offers a Chronic Illness Panel with more than 350,000 patients in the United States and Europe covering 100 different chronic illnesses.

Imap, established in December 2004, conducts worldwide syndicated marketing research studies.

Lightspeed Research

Lightspeed Research (LR) was founded by TKG in 2000 and is based in Basking Ridge, N.J. The company operates in North America, Europe and Australia (www.lightspeedresearch.com).

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

client needs.
Through its network of proprietary panels and accredited panel partners LR can provide access to more than 15 million household members across 25 countries in Europe, North America and Asia Pacific. Consumer panels are available in North America, Great Britain, the Netherlands, Australia—and France, Germany, Italy and Spain through partners—providing access to adults, teens, kids and other specialty audiences.

The Mattson Jack Group

Mattson Jack (MJG) was founded in 1986 and was acquired by TKG in June 2003. The company is based in St. Louis and has six offices in the United States, one in the United Kingdom and an associate in Japan.

MJG is a healthcare-focused consultancy serving the pharmaceutical and biotechnology industries, with the mission to provide advanced analysis, planning, decision support and implementation.

MJG’s core competencies include business analytics (market research, modeling and forecasting, pricing and reimbursement); corporate development services (licensing, market opportunity assessment and strategic planning); brand optimization (promotional response modeling, mix optimization and prescription influence mapping); and oncology market specialization through DaVinci Oncology Specialists.

The firm also provides subscription services and tools that include EpiDatabase, Forecast Architect, CancerMETRIC, Cancer Perspectives—now being merged into Can-

cer!Mpact—and Oncology Marketing Strategies. The DaVinci operations were combined with MJG’s oncology specialty practice in 2004.

Added Value

Three TKG companies—Added Value, Icon Brand Navigation and Diagnostic Research—combined under the Added Value (AV) name.

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

DR Added Value, formerly Diagnostic Research International (DRI), conducts consumer and b-to-b research across a number of product and industry categories and for all types of marketing issues. Major services offered are copy-testing, brand and advertising tracking, market and consumer segmentation, product design and customer satisfaction.

Icon Added Value (formerly Icon Brand Navigation) provides market research and

consulting services, including brand communications, product research, brand tracking and customer satisfaction studies, with offices in four countries (www.icon-added-value.com). In addition, the firm offers support for advertising agency selection; coaching in brand management, communications development and agency management; and tailored seminars and workshops for defining brand identity. Its research activities are built around a brand value management structure with four brand components: analytics, strategy, implementation and monitoring.

4



HUNT

WESTAT INC.

www.westat.com

Westat Inc. in Rockville, Md., is an employee-owned company founded in 1961. The president and CEO of Westat is Joseph A. Hunt, 70. He earned an M.S. at the Massachusetts Institute of Technology.

U.S. revenue in 2005 was \$420.4 million, up 5.7% over 2004.

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

Its major statistical surveys cover educational progress, medical expenditures, environmental studies and long-term follow-up surveys concerning health, education and employment. Its research activities include projects to implement health communication plans, enhance reporting and performance of government programs and improve patient safety in the nation's healthcare system.

The firm continues to conduct CATI at seven telephone research centers throughout the United States. Westat's nationwide staff of field interviewers uses computer-assisted interviewing methods on many large long-term surveys. To support and manage these large distributed operations, Westat maintains a large, secure, nationwide computer and communications infrastructure.

In 2005, Westat developed its international work to support clinical trials in Costa Rica, South Africa and Thailand. The firm continues its clinical trials work for U.S. government, pharmaceutical and biotech clients.

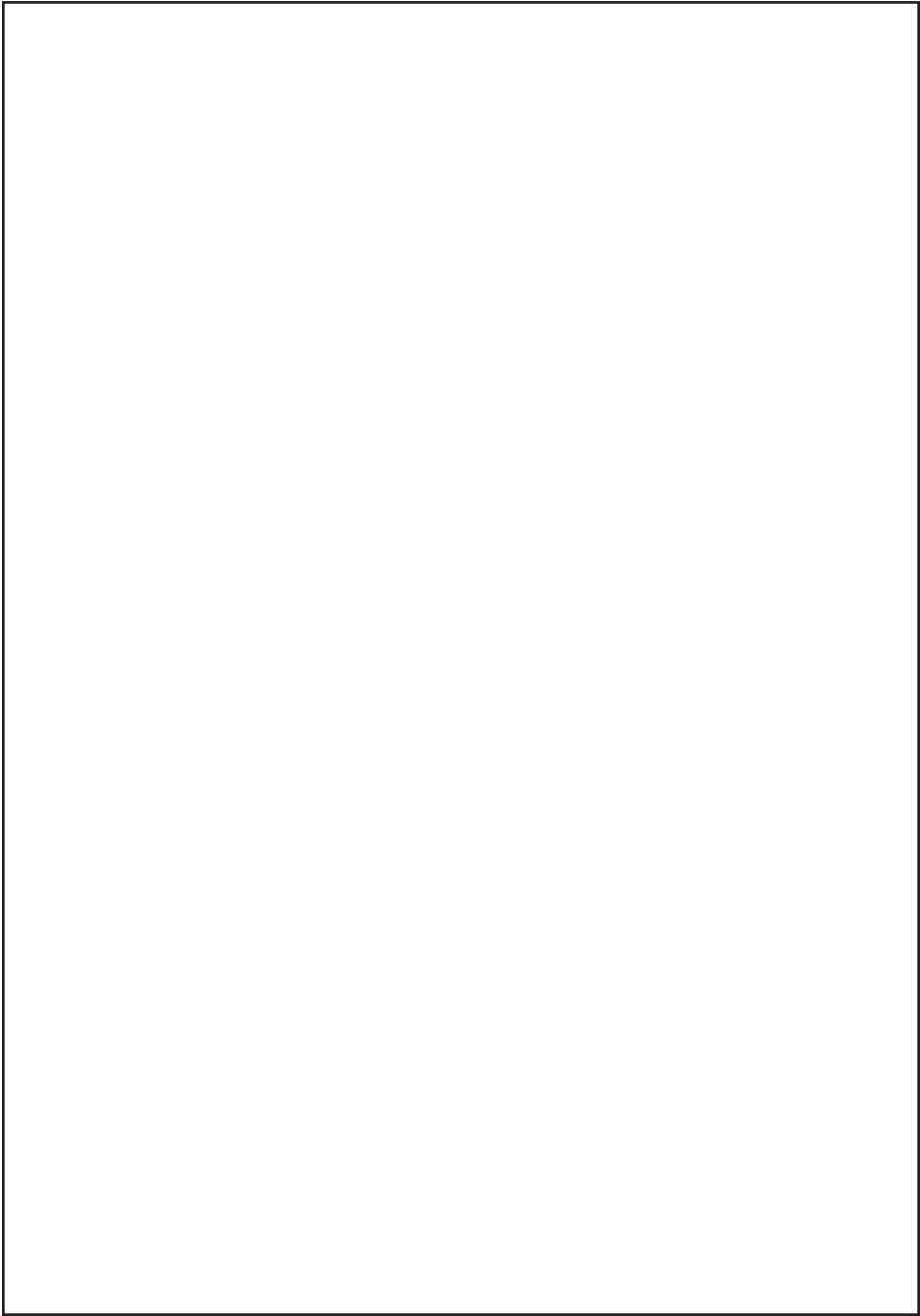
Also in 2005, Westat strengthened its methods research capabilities with an emphasis on maximizing respondent cooperation and the application of Web and database technologies to survey information collection and survey and statistical information dissemination. It operates a behavioral research facility, specializing in Web usability studies to augment its cognitive laboratory and focus group capabilities.

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

The firm's staff includes more than 1,835 full-time salaried employees. In addition, Westat's telephone-interviewing, field-interviewing and data-editing staff averaged about 1,200 during 2005.

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MARKETING NEWS' RECRUITMENT CLASSIFIEDS
YOUR FIRST STOP FOR THE
BEST JOBS IN MARKETING



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Information Resources Inc. (IRI) in Chicago was founded in 1979, became a public company in 1983 and was acquired in 2003 by Symphony Technology Group LLC, a private company.

Scott W. Klein, 48, is president and CEO of IRI and Romesh Wadhwani, 58, is chairman. Klein earned a B.A. in Accounting at Syracuse University, and Wadhwani earned a Ph.D. in Electrical Engineering at Carnegie-Mellon University.

U.S. revenue in 2005 was \$409.0 million, up 2.9% over 2004. In 2005, 34.6% of total revenue, or \$216.0 million, was generated from outside the United States.

IRI is a global provider of enterprise market information services for the CPG, retail and healthcare industries using a combination of real-time market content, advanced analytics, enterprise performance management software and professional services.

IRI's activities are organized into four core areas:

◆ Consumer understanding: Offering an understanding of shoppers, consumers and individual users, IRI addresses issues such as what consumers are buying, and when, where, how and why they are buying it; different consumer segments' reactions to promotion programs; the effect of shopping trips on purchasing; and prediction of attitude change.

◆ Market performance: Using granular information about each retail account by geography, it addresses issues such as performance across retail outlets by account and store; optimal price for product by account, region, neighborhood and store; and the elements driving daily performance of key retailers.

◆ Retail performance: Providing in-store conditions on demand, IRI services address issues that include manufacturers' and retailers' collaboration to maximize performance and profitability; anticipate demand store-by-store; identify likely out-of-stock situations in time to correct them; optimize assortments as well as price and promotion plans by region and by store; manage categories and provide space planning covering total store activity.

◆ New product management: With predictive performance measures, IRI addresses anticipation of successful new flavor, color, nutritional profile, packaging or health attribute in time to build it into new product portfolios and prediction of success of newly launched products.

IRI offers the following products and services:

◆ InfoScan Retail Tracking: This census-based point-of-sale (POS) tracking service provides manufacturers and retailers with access to detailed information on sales, share, distribution, pricing and promotion, across a wide variety of retail channels and accounts. Info-Scan preserves deep granularity, allowing for easy data integration and offering greater flexibility and relevance in how users view data.

◆ Consumer Network Household Panels and Shopper Insights: The Consumer Network household panel provides answers to who is buying, what they buy, where they buy, how often then buy and many more questions. IRI integrates purchase data with information about consumers to provide a comprehensive view of the buying experience. IRI builds on this by creating specialty panels to capture the depth of insight in certain high-value, hard-to-research consumer segments, categories and channels.

Research designs coupled with new recruitment and data collection technologies, specifically engineered to attract the right panelists and achieve the necessary compliance, are required for each of these panels.

Through the use of this data, IRI constructs reports and automated analyses for specific business issues. Most of these

reports are Web-based to facilitate distribution and use throughout organizations.

In 2005, the IRI Shopper Insights platform was enhanced by expanding the Consumer Network household panel and offering a series of integrated insights, shopper and specialty panels, which are enabled through a new portable, personal collection device.

◆ **Advanced Analytic Insights:** Analytical modeling, consumer insights and testing services are supported by an experienced analytics staff. Its Marketing Mix Analytics services focus on quantifying, testing and simulating return on marketing investment for brands. IRI uses a flexible, Bayesian-based modeling platform to provide insights to optimize the marketing mix and tactical insights to refine execution, using analytic tools to decompose the drivers of current business trends and simulate the effects of changes on brand plans.

For scenarios that cannot be simulated using historical data, IRI offers BehaviorScan in-market testing service, a media testing capability that executes in-market media weight and copy tests. It also offers other testing services to compare in-store media, assortment and pricing decisions, as well as media plan alternatives.

◆ **Enterprise-Class Decision Support Solutions:** These services provide an enterprise-class framework for all phases of planning, performance analysis and rapid decision-making. Integrated predictive scenario analysis capabilities create and evaluate multiple what-if calculations and plan alternatives to help evaluate the impact of decisions before they are made.

◆ **Consumer Driven Merchandising for Retailers:** These IRI solutions assist in stocking levels to demand, improve support for promotional activities, produce shopper-appropriate store plans and improve the efficiency of store operations.

◆ **Next Generation MarketKnowledge Technology Platform:** The platform supports IRI's applications with grid computing, visualization tools and dashboards and daily POS data for retailers. It combines daily data, automated analytics and decision support software to help address major business processes, such as out-of-stock monitoring and new product launches, and to drive insights about holiday, seasonal and promotional event performance.

◆ **Industry Vertical Solutions:** IRI offers vertical experience and customized products and services for multiple industry verticals, including health care and wellness, center store, confections, beer, wine and spirits, bakery and dairy.

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

IRI delivers insights through a comprehensive, integrated view of the beverage alcohol industry. The retail tracking products and analytics offered by IRI are scaled to meet the beverage alcohol industry needs, enabling full understanding of retail sales trends, purchase behavior and consumer insights in grocery, drug, convenience, liquor and club stores.

IRI has 1,569 full-time employees in the United States and 3,604 worldwide.

6



LOWDEN

TNS U.S.

www.tns-global.com

TNS U.S. is the U.S. unit of Taylor Nelson Sofres plc., a public company, based in London.

David Lowden, 48, is chief executive of TNS. He earned a B.A. in Business Administration at University of Strathclyde in the United Kingdom.

U.S. revenue for 2005 was \$379.5 million, down 4.2% from 2004. In 2005, 79.1% of total worldwide research revenue, or \$1.44 billion, was from outside the United States.

TNS is a worldwide market information group and provider of custom research, both commercial as well as social and political

polling.

It is also a major supplier of consumer purchase panel, TV audience measurement and media intelligence services in selected countries. It provides market information and measurement, together with insights and analysis, to local and multinational organizations.

TNS operates a global network spanning 70 countries and employing 13,000—2,252 in the United States. In the United States, TNS has three divisions and nearly 50 sales and service offices.

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www.marketingpower.com

AMA'S HOME ON THE
WORLD WIDE WEB

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TNS Custom Research division combines industry sector knowledge with research experience in strategic business issues and skilled analytic and consulting staff. In addition to general custom research, it provides a wide range of services, syndicated research and managed access panels.

Dedicated research teams concentrate on the automotive, consumer packaged goods (including beverages and spirits), financial services, polling and social research, retail, restaurants, travel and transport, and technology (information technology, telecommunications and media and entertainment) industries.

Industry teams draw upon expert staff in the areas of motivational, new product development, brand and advertising, sports marketing and sponsorship, multicultural, mystery shopping and stakeholder management research. Much of this resides in TNS's specialized business units, including TNS Advertising and Brand Performance, TNS FYI (new product volumetric forecasting), TNS Market Development (multicultural research) and TNS Sport. Its Center for Strategic Services provides analytics and sampling, business modeling and strategic consulting.

TNS services work on a global scale. They include:

- NeedScope*: underlying emotional needs assessment;

- Conversion Model*: commitment measurement;
- AdEval*: copy testing;
- MarketWhys*: in-market brand and ad performance tracking;
- InnoSuite Launch Maximizer*: volumetric forecasting; and
- TRI*M*: customer satisfaction and relationship monitoring and management.

Syndicated research offerings cover several industries: automotive (Imminent Buyer Study), CPG (SIP beverages, toiletries and cosmetics), financial services (Affluent Market Report, Consumer Credit Card Report, Small Business and Entrepreneur, Middle Market and Consumer Card), sports (ESPN Sports Poll and the ESPN Deportes Hispanic Sports Poll), travel and transport (American Traveler Survey, Survey America, Travels-America, Travelers Response to Incentive Programs and Hotel Travelers Response to Incentive Programs), and telecoms (Bill Harvesting).

TNS operates managed access panels worldwide (6th-dimension panels, formerly TNS NFO Access Panels) in the United States and major countries in Europe and Asia. It also manages a Spanish-language panel.

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

mance optimization; and physician and DTC promotional assessment.

Informing decisions across the product life cycle, TNS Healthcare provides problem-solving and insights for product development, pre-launch landscaping, market assessment, positioning and segmentation, message and campaign creation; pricing, forecasting, attitude and awareness measurement and post-launch tracking. Delivering insights across stakeholders—including physicians, patients and consumers—TNS Healthcare anticipates and understands customers' behaviors to maximize results. Its J Street panel provides global physician access—supported by local country staff—through both online and traditional methodologies.

TNS Healthcare's global frameworks include Brand Performance Optimization (BPO), which integrates brand equity and market equity factors for a complete diagnostic view. BPO guides companies in building commitment, a new metric, validated against prescribing data to predict and drive Rx dynamics, protect share and prevent switching. It also offers a global Sales Performance Optimization (SPO) framework, providing a total view of the relationship between physicians and brands. Integrating commitment and relationship metrics, SPO configures the optimal physician experience to drive prescribing.

In addition, Cardiovascular Integrated Insights provides a comprehensive view of the global cardiovascular market. It brings together BPO and SPO information, as well

as CardioMonitor (an international CV patient database) and Cardio2020 (a look at upcoming changes in diagnoses, treatment and management, from 25 leading cardiologists).

TNS Healthcare operates in the United States, United Kingdom, Germany, France and Spain, and in 2005 established a client service group in Italy. Its worldwide focus on performance optimization offerings allows TNS Healthcare to provide global performance optimization insights, supported by local country staff, in addition to multi-country services.

TNS Media Intelligence division is a leading provider of competitive advertising intelligence to advertising agencies, advertisers and media properties. The division's tracking technologies collect advertising expenditure and occurrence data, as well as select creative executions, for more than 2.2 million brands and 190 million ad occurrences each year. It provides more than 3,000 clients in the United States with strategic advertising information for 20 monitored media.

TNS Media Intelligence also delivers strategic intelligence in key industry marketplaces through its companies: Marx Promotion Intelligence, a provider of FSI and coupon promotion information; Theatrical Entertainment Services, a large U.S. provider of box office verification and cinema trailer tracking services to the entertainment industry; and Campaign Media Analysis Group, a provider of advertising intelli-

gence on the U.S. political marketplace. The division offers information through more than 20 products and services, including competitive analysis, sales prospecting, strategic planning, tactical executions and proof-of-performance. TNS Media Intelligence maintains offices throughout the United States, with sales offices in Atlanta, Chicago, Dallas, Los Angeles, Minneapolis, New York and Arlington, Va. The data collection facilities in West Chester, Pa., and Chesapeake, Va., focus on the capture and classification of advertising data.



GfK AG USA comprises the U.S. operations of GfK AG, a public company based in Nuremberg, Germany, and established in 1934. In August 2005, NOP World was acquired by GfK. Klaus L. Wübbenhorst, 50, is the CEO of GfK AG. He earned a Ph.D. from Technical University of Darmstadt, Germany. U.S. revenue in 2005 was \$316.3 million, up 3.9% from 2004. In 2005, 72.8% of total worldwide revenue, or \$848.2 million, was from outside the United States. The 2005 revenue and growth rate include the full year NOP World U.S. revenue. Worldwide revenue of GfK AG in 2005 was \$1.31 billion, including NOP for January through December 2005. GfK AG is a worldwide market research organization providing services in five business divisions: Custom Research, Retail and Technology, Consumer Tracking, Media and Healthcare. In addition to 13 German subsidiaries, the company has more than 130 subsidiaries and affiliates located in 63 countries and more than 7,500 employees worldwide and 1,028 in the United States. GfK now offers research services through four of its five business units in the United States:

Custom Research

◆ GfK Arbor (www.gfkarbor.com) is a full-service marketing research and consulting firm, specializing in brand health management, customer relationship management and related strategic areas. The firm's practice groups specialize in consumer packaged goods, telecommunications, financial services, healthcare and b-to-b industries. It provides advanced quantitative analysis and cross-engagement perspective and counsel.

◆ GfK Custom Research Inc. (GfK-CRI) (www.gfkcustomresearch.com) provides U.S.-based clients marketing research, customer satisfaction and loyalty, and database marketing services worldwide, through offices in Minneapolis and New York, and through client service centers in Chicago, Dallas, Philadelphia and San Francisco. GfK-CRI is a Malcolm Baldrige National Quality Award winner. Clients include Fortune 500 companies in b-to-b and consumer markets, including consumer packaged goods, financial services, restaurants, retail, automotive and technology. Its services includes new

product development, tracking, brand equity management and leverage, customer satisfaction and loyalty, segmentation, qualitative, database marketing, online research and design and delivery of secure Internet client portals. Global research is implemented by an experienced team using GfK's worldwide network.

◆ GfK NOP (www.gfkamerica.com), based in New York with offices throughout North America, provides services developed from a comprehensive 360-degree view of each client's market. These include both custom market research and syndicated data

resources. GfK NOP's custom research is supplemented by several of the world's oldest and largest databases, including Roper Reports U.S., Roper Reports Worldwide, Starch Ad Readership, AFI Automotive Intentions and Shopping Trends. These databases support clients in multiple industries, including automotive, financial services, b-to-b, technology, consumer, public affairs, media and hospitality, with customized decision support and returns on marketing investment (ROMI) analyses at each phase of the marketing cycle.

The firm's industry-specific staff work closely with specialists from its marketing Centers of Excellence—Market Opportunity, Brand Strategy, Marketing Effectiveness, Customer Management—and practice areas to blend GfK NOP's syndicated data with custom insights.

◆ GfK Automotive (www.gfkamerica.com) in the United States is a full-service marketing research and consulting firm specializing in the automobile industry, based in Southfield, Mich., with offices in South-

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ern California. The company advises clients regarding the development of new products, brand maintenance and market communications leveraging its U.S. database of pre-purchase automotive behavior. Its suite of products provides a comprehensive set of tools to understand the dynamics of the automotive industry and its performance from a variety of aspects. The firm also offers custom research capabilities such as advanced product clinics and qualitative research.

Retail and technology

◆ GfK Audits & Surveys (www.gfkms.com), based in New York, provides retail data collection services, which include sales, distribution, shopper and retailer attitudes and other data on a broad range of products and outlet types, including pet supplies, jewelry, optical, CPG, professional beauty, travel, automotive and home furnishing products, as well as measurements relating to the Hispanic market. Its National Retail Census of Product Distribution provides the size of the retail universe and a complete picture of distribution across all types of outlets.

Media

◆ Mediamark Research (www.mediamark.com) offers comprehensive demographic, lifestyle, product usage and exposure to all forms of advertising media collected from a single sample. As a U.S. supplier of multimedia audience research, the

firm provides information to magazines, television, radio, Internet and other media, leading national advertisers and more than 450 advertising agencies, including 90 of the top 100 agencies in the United States.

Health care

The GfK U.S. Healthcare Cos. (www.gfkushc.com) comprises three healthcare marketing research agencies: GfK Market Measures, GfK Strategic Marketing and GfK V2. Each of the firms has its own set of core offerings, which provides a full range of custom and syndicated marketing research.

◆ GfK Market Measures (www.gfkmarketmeasures.com) provides a mix of syndicated and custom marketing research services, supporting market assessment, brand tracking, message effectiveness, sales force effectiveness, healthcare consumer and product launch applications. The firm's custom research skills includes pricing, forecasting, positioning, concept testing, message development, promotional effectiveness evaluation and opportunity assessment. Major products include Therapeutic Class Studies, PatientDriver, Detail Tracker, Detail Watch and Fastape Premium.

◆ GfK Strategic Marketing (www.gfksm.com), with a full range of quantitative services, supports clients in areas such as pricing, forecasting, clinical trial optimization and market segmentation. Key products include Uniter, Hospital Uniter and Perceptual Deficit Simulator. The firm's Qualitative Institute uses a variety of quali-

tative research methodologies, including cross-cultural projective and elicitive techniques, to provide counsel at each stage of the product lifecycle.

◆ GfK V2 (www.gfkv2.com) conducts qualitative marketing research with patients and physicians, as well as conducting advanced analytics and quantitative research. Products include Information Architecture (product positioning), Competitive Analysis of Strategy and Tactics—CAST (war gaming), Market Analysis of Patients and Products—MAPPs (patient flow/treatment maps) and PracticeView (strategic account management).



Arbitron Inc. in New York was founded in 1949, and in 1960 became a subsidiary of publicly held Ceridian Corp. in Minneapolis. In March 2001, Ceridian completed a

reverse spin-off of Arbitron into a public company. Arbitron's president and CEO is Stephen B. Morris, 63. Morris earned an MBA at Harvard Business School. U.S. revenue in 2005 was \$297.6 million, up 3.8% over 2004. In 2005, 4.0% of total revenue, or \$12.4 million, came from outside the United States. The growth rate includes the 2004 and 2005 revenue from Marketing Resources Plus, acquired March 2004, and excludes Integrated Radio Systems LLC, acquired September 2005. Arbitron is an international media and marketing research company primarily serving broadcast, satellite and online radio, cable, advertising agencies, advertisers, outdoor and out-of-home media. Through Scarborough Research, its joint ownership with VNU Inc., Arbitron provides media and marketing research services to broadcast TV and print media. Arbitron serves about 4,600 radio stations and 1,500 advertising agencies and major advertisers, more than 300 television stations, nearly 150 cable customers, more than 150 newspapers and nearly 80 outdoor advertising companies. The firm provides national and local radio audience measurement in the United States and surveys the retail, media and product purchase patterns of local market consumers. It also provides application software to analyze ratings and consumer data.

Media Services

◆ Measuring U.S Local and National

Radio Audiences: Arbitron measures the size and composition of radio station audiences by periodically surveying radio listeners in more than 290 U.S. markets. It 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. The audience measurements are provided for a wide variety of demographics and dayparts for total radio listening and for 56 separate radio networks.

◆ **Surveying Consumers in Local Markets:** Arbitron provides consumer profiles of radio listeners, broadcast television and cable television 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. Measurements are provided in about 270 local markets throughout the United States through its Scarborough service (a joint venture between Arbitron and VNU Inc.) as well as two other proprietary services that conduct ongoing consumer surveys.

Arbitron also provides software applications that provide access to media and consumer information from Arbitron and other research providers. The software assists in making media buying and selling decisions, as well as in managing and programming radio stations.

◆ **Arbitron Outdoor Services and Online Radio Ratings:** Through Scarborough and its other local consumer services, Arbitron provides outdoor and out-of-home measurements of retail behavior, demographics, lifestyle and media habits of local market consumers. In late 2004, Arbitron and comScore Media Metrix created comScore Arbitron ratings, a service producing monthly reports of online radio audiences to the leading online radio providers.

◆ **Custom Research Services and International Operations:** Arbitron is in the process of expanding its custom research efforts to serve emerging advertising media. For example, it has produced audience listening estimates for sporting events, Chinese-language radio and custom research studies for satellite radio providers and out-of-home/place-based media.

Through Continental Research, its London-based subsidiary, Arbitron provides media, advertising, financial, public sector, telecommunications and Internet research services in the United Kingdom and continental Europe.

The Arbitron syndicated radio audience measurement service also provides audience estimates covering a wide variety of demographics and dayparts for Mexico City, Guadalajara and Monterrey.

Arbitron Portable People Meter

Arbitron has developed a Portable People Meter (PPM) system capable of measuring radio, broadcast television, cable television, Internet broadcasts, satellite radio and television audiences, and retail store video and audio broadcasts. In the United States, Arbitron is working with the radio, broadcast television and cable television industries, as well as with advertising agencies and adver-

tisers, to demonstrate PPM as a new electronic ratings system.

In July 2006 (pending Media Ratings Council accreditation in Houston), Arbitron will start making the change to the PPM with a rollout schedule of the top 10 radio markets by the fall of 2008, and into all of the top 50 radio markets two to three years thereafter. The firm is also working directly with the broadcast television and cable industry on additional, noncurrency services that use the PPM.

Arbitron has entered into licensing agreements with international media information

services companies. BBM Canada, the Canadian industry cooperative for audience ratings, uses the PPM as the official ratings system for buying and selling commercial airtime on French-language television in the markets of Quebec and Montreal. TNS, a United Kingdom company, uses Arbitron's PPM system for media measurement applications in Belgium, Norway and Singapore. TNS also has a license to use Arbitron's PPM technology and its audio encoding technology for radio and television audience measurement in selected countries in Europe, Asia Pacific, the Middle East and Africa.

In addition, Arbitron has entered into evaluation agreements with other audience measurement companies in other countries.

Project Apollo

One application of PPM is its use as the media collection tool for a national marketing-oriented research service, Project Apollo. This marketing research service that Arbitron and VNU are exploring would be designed to collect and connect three types of data:

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**MN's Names
in the News**
tells you who's where
in marketing

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—Exposure to messages on the national media by using the PPM to track electronic media and by using other survey methods for print, the Internet and other media.

—Changes in consumer brand recognition and preference through online surveys.

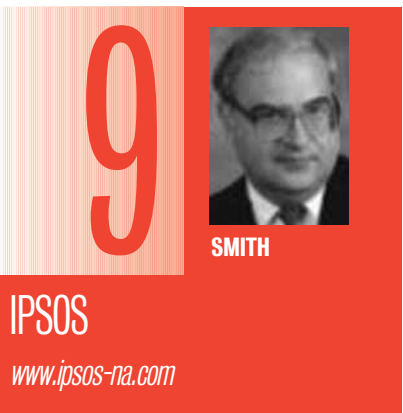
—Store traffic and purchases of consumer packaged goods through ACNielsen in-home scanner technologies as well as spending on consumer services by means of additional survey methods.

As of January 2005, Arbitron and VNU have deployed a national pilot panel of more than 11,000 persons in 5,000 households, which collects multimedia and purchase information from a common sample of consumers. The pilot panel is designed to show advertisers how Project Apollo would enable a better understanding of the link between consumers’ exposure to advertising on multiple media and their shopping and purchasing behavior. The pilot is designed to enable advertisers to estimate and quantify the top line revenue growth that could be achieved using Pro-

ject Apollo. The pilot also showcases the enhanced ability of the “single-source” marketing research service to measure the return on investment for marketing efforts.

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

Arbitron has 919 full-time employees in the United States and 1,057 worldwide.



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. Ipsos in North America was formed in 2001 from the combination of a number of U.S. and Canadian market research companies.

James T. Smith, 58, is CEO and chairman of Ipsos in North America. He earned an MBA from Cornell University.

U.S. revenue in 2005 was \$226.2 million, up 11.2% over 2004. In 2005, \$667.5 million, or 74.6%, of total revenue was from outside the United States. The growth rate excludes 2004 and 2005 revenue from Shifrin Research Inc. in New York, acquired January 2005.

Ipsos offers a suite of global survey-based market research services in the areas of advertising, customer loyalty, marketing, media and public affairs, as well as forecasting, modeling and consulting. Ipsos companies offer a line of custom, syndicated, omnibus, panel and online research products and services. Ipsos is represented by six companies in North America:

- ◆ Ipsos-ASI (www.ipsosasi.com) is a worldwide provider of advertising pretest-ing services. It offers a full range of advertising research services at all stages of the advertising development process, including copy testing, advertising tracking and brand equity evaluation. Ipsos-ASI helps in the development, evaluation and improvement of its clients’ advertising efforts.
- ◆ Ipsos-Insight (www.ipsos-insight.com), the marketing research division, provides services in market assessment, brand management, innovation and new product development. It has client services teams specializing in consumer products, technology, communications, health, pharmaceuticals, financial services, entertainment, food-service, agrifood, cable, energy, utilities, and lottery and gaming.
- ◆ Ipsos Loyalty (www.ipsosloyalty.com) is a global, specialized practice in customer satisfaction management, customer relationship management and employee climate management, supported by a modular suite of integrated research tools.
- ◆ Ipsos Novaction and Vantis (www.ipsos-nv.com) provides forecasting, modeling and consulting for companies in the FMCG, durable goods and service industries. The firm’s survey-based research offerings are designed for new product development (needs identification, concept screening and forecasting sales); feature optimization and pricing; brand and market management; and sales and marketing effectiveness.
- ◆ Ipsos Public Affairs (www.ipsospa.com) is a nonpartisan, survey-based research firm made up of seasoned professionals. It conducts strategic research initiatives for a number of American and

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international organizations, based not only on public opinion research but elite stakeholder, corporate and media opinion research. It conducts national and international public polling on behalf of The Associated Press.

◆ Ipsos Reid (www.ipsos.ca), is a Canadian provider of public opinion research in Canada, as well as loyalty, forecasting and modeling insights. With operations in seven cities, the firm employs more than 300 researcher professionals and support staff in Canada. It has a large network of telephone call centers, as well as large pre-recruited household and online panels. The firm is staffed with experienced research consultants having extensive industry-specific backgrounds, which offer syndicated information and custom services across key sectors in the Canadian economy, including consumer packaged goods, financial services, automotive, retail, and technology and telecommunications.

Ipsos employs more than 6,000 research professionals and support staff worldwide, including 679 in 15 locations in the United States.

LOOKING FOR HELP?
MAKE MARKETING NEWS
RECRUITMENT CLASSIFIEDS
YOUR FIRST STOP.

10
SYNOVATE
www.synovate.com

PHILPOTT

Synovate, created in 2002 (formerly Aegis Research), was acquired in 1999 by the Aegis Group plc, a London-based public company listed on the London Stock Exchange.

Robert Philpott, 45, is CEO of Synovate Americas and Global COO for Synovate. He earned a B.A. in Business Studies at Manchester University in the United Kingdom. Adrian Chedore is worldwide CEO for Synovate.

U.S. revenue in 2005 was \$216.5 million, up 11.8% over 2004. In 2005, revenue from outside the United States was \$385.0 million, or 64.0% of total revenue. The growth rate includes 2004 and 2005 revenue from the March 2004 acquisition of Symmetrics Marketing Corp. In 2005, revenue of Synovate worldwide was \$601 million and revenue of Aegis Group plc was \$1.6 billion.

Synovate is a global market research firm

providing global support and a suite of research services, supported by local knowledge and understanding of the world's diverse markets, but never at the expense of relevant cultural differences. It works as a global team, where everyone lends support to each other, sharing knowledge and best practices.

Synovate clients range from Fortune Global 500 companies to entrepreneurial start-ups and come from all sectors of business—from consumer packaged goods to petrochemicals, media and advertising, government, quick-serve restaurants, technology and more. It employs more than 5,000 permanent staff worldwide, with 838 in the United States.

The firm's global practices include:

◆ Synovate Healthcare: The firm has experience serving medical, pharmaceutical and healthcare clients worldwide using custom research and branded services to address marketing, operational, quality and satisfaction issues and more.

◆ Synovate Motoresearch: Its custom automotive consumer research provides guidance at all points of the product life cycle, from concept inception to buyer behavior.

◆ Synovate Loyalty: Synovate's Loyalty practice helps to develop, implement and monitor customer-centric programs throughout all levels of business.

◆ Synovate Censydiam: Uncovering the subconscious emotional needs that drive customers' buying behavior, the firm shows how to define these needs and link them to brands. Synovate also offers these global

research services:

—*AdCheck*: Provides diagnostic analysis of advertising executions and delivers action-oriented recommendations on improving ad effectiveness.

—*BrandVision*: A custom, continuous tracking service that provides an understanding of how consumers view brand(s), competitors' brands and the advertising and promotional campaigns that support them.

—*Global Omnibus*: This service is one-stop-shopping for multi-country telephone omnibus research across the globe; plus TeleNation, TeenNation in the United States and TeleNacion for U.S. Hispanic consumers, with AsiaBus focusing on the Asia Pacific region.

—*PinPoint*: Identifies a brand's relative strengths and weaknesses and identifies the key image drivers that drive brand preference and the relative importance of each of the image attributes measured.

—*ProductQuest*: A focused approach to product testing and analysis, delivering information throughout the product lifecycle.

—*Synovate Qualitative*: Uses techniques to explore marketing issues and discover the underlying factors that drive customer behavior.

—*The Momentum Engine*: A unique scoring system identifies those consumers with the best potential to increase the future sales growth of brands.

—*ViewsCast*: Provides a decision-support

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tool for carrying out continuous monitoring of satisfaction and preferences throughout the value chain.

Synovate’s industry-focused regional divisions offer teams of dedicated and experienced research staff in these specific areas:

—*Financial Services*: This practice serves in all sectors of the field: retail banking, investments, insurance, payment products and commercial banking.

—*Travel and Leisure*: Airline, hospitality, cruise and tourism research specialists with strong insights into these sectors on both a global and local level.

—*Technology and Telecom*: The firm has conducted tech and telecom research in more than 60 markets around the world, for every major manufacturer and operator.

—*Diversity*: Synovate’s staff reaches the multicultural segments of the U.S. marketplace and taps into the trends in the Hispanic, African-American, Asian-American, GLBT and Grey markets.

The firm’s Global Opinion Panel has access to millions of individual consumers, including online panel members. Through its ViewsCast and Interactive Voice Response interviewing, it gathers consumer insights 24/7 and offers instant access to results via the Web. ION Everywhere, its proprietary handheld multimedia interviewing system, captures consumer responses at the point of sale.

During 2005, Synovate conducted almost 25 million interviews and more than 103,000 focus groups and in-depth interviews. The company has 2,657 CATI stations

and more than 1.7 million access panel households, of which 1.2 million are Internet access panel households.

11



BRERETON

MARITZ RESEARCH

www.maritzresearch.com

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

Michael Brereton, 46, is president of MR. He earned an MBA at Bowling Green State University.

U.S. research-only revenue in 2005 was \$164.2 million, up 22.5% over 2004. In 2004, 20.7% of total research-only revenue, or \$42.9 million, came from outside the United States. The growth rate excludes 2004 revenue for Delve, which was sold in February 2004. Maritz Inc.’s revenue in 2005 was \$1.4 billion.

MR provides services that close the gap between brand promise and brand performance through an understanding of customers, employees and channel partners. Its specialized divisions are primarily centered on the automotive, financial services, hospitality, telecommunications, retail, technology and pharmaceutical sectors.

In 2005, MR introduced Maritz Customer ExperienceAdvantage. This approach uses customer satisfaction analysis and employee attitudinal research to understand, enable and motivate people to improve business performance. It provides the framework, tools and support necessary to differentiate customer experiences at the local level, for benefits at the corporate level.

MR has developed highly specialized skills in the area of pharmaceutical research, and in 2006, introduced its Pharma Research Group. Also in 2006, in conjunction with Texas A&M University’s Center for Retailing Studies, MR presented the Maritz Retail Leadership Award to Talbots for its commitment to helping women obtain college degrees through its scholarship program.

MR employs 415 people full time in the United States and 612 worldwide. Offices are located in Chicago; Detroit; Hamburg, Germany; Los Angeles; New York; Marlow, U.K.; Minneapolis; Montreal; St. Louis; Toledo; and Toronto.

12



NOVAK

HARRIS INTERACTIVE INC.

www.harrisinteractive.com

Harris Interactive Inc. (HI), based in Rochester, N.Y., was founded in 1975 as

Gordon S. Black Corp., and together with Louis Harris and Associates, which was founded in 1956, became a public company in 1999.

Gregory T. Novak, 43, is president and CEO of HI. He earned an M.S. at Krannert School of Management at Purdue University.

U.S. revenue in 2005 was \$162.2 million, up 4.8% over 2004. In 2005, \$46.6 million, or 22.3% of total revenue, was generated outside the United States. The growth rate includes the 2004 and 2005 revenue of Wirthlin Worldwide, acquired in September 2004.

HI is a global research company known for its Internet-based research methods and The Harris Poll. It serves its clients through its U.S., Europe and Asia offices; its wholly owned subsidiary, Paris-based Novatris; and through an independent global network of affiliate market research companies.

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

HI manages the world's largest online panel of double opt-in respondents. They have also developed a complete set of specialty panels to meet unique sampling requirements, including affluent; auto design advisers; chronic illness; gay/lesbian/bisexual; IT decision-makers; physicians; product, advertising and concept testing (PACT); teens and tweens; movie trailer testing; and others. Additional specialty panels are being created.

The firm has developed an online data collection system that functions in 48 different languages and operates around the clock. The system can send out more than 1 million e-mail invitations per hour and process 240,000 five-minute inbound surveys per hour. Since '97, HI has completed more than 58 million online surveys.

HI has 733 employees in the United States and more than 1,000 full-time employees worldwide.

behavior. Services include industrywide and client-commissioned research, business-to-business consulting, automotive forecasting, corporate training and performance improvement, and media research.

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

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, marine, health care, utilities and consumer electronics.

The firm's clients include many Fortune 500 companies in the United States and many internationally. JDPA has five U.S. offices and locations in seven countries internationally. It has 630 full-time associates in the United States and 820 worldwide.

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JOB HUNTING? MAKE *MARKETING NEWS'* RECRUITMENT CLASSIFIEDS YOUR FIRST STOP.

13



GOODALL

J.D. POWER AND ASSOCIATES

www.jdpower.com

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

Steven C. Goodall, 51, is president of JDPA. He earned an MBA at the University of Southern California.

U.S. research-only revenue in 2005 was estimated at \$152.2 million, up 14.0% over 2004. Revenue from outside the United States in 2005 was estimated at \$46.0 million, or 23.2% of total estimated research-only revenue.

JDPA is a global marketing information services company that conducts independent consumer surveys of product and service quality, customer satisfaction and buyer

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JOHNSON

THE NPD GROUP INC.

www.npd.com

The NPD Group Inc. (NPD), in Port Washington, N.Y., is a group of privately held corporations. It was founded in 1967.

Tod Johnson is chairman and CEO of NPD and Karyn Schoenbart is president and COO. Johnson, 61, earned an MSIA at Carnegie Mellon University.

U.S. revenue in 2005 was \$128.3 million, up 14.6% over 2004. In '05, 20.2% of total revenue, or \$32.6 million, was generated from work conducted outside the United States. The growth rate excludes revenue from the acquisition of STS Marketing Research in November 2005.

Also excluded from this revenue are some other businesses that NPD does not consolidate, as well as services for Ipsos-Insight, NPD's former custom marketing research

business, which it sold to Ipsos SA in 2001 and for which NPD still does work under the buyout agreements.

The firm collects information on what is selling, where, to whom and why, helping its clients and retail partners uncover market opportunities, understand channel migration patterns, strengthen channel relationships and benchmark industry performance. It offers companies perspective about their industry as a whole and insight on their customers, products, channels of distribution and competitors.

NPD products and services include tracking services that monitor retail purchasing using POS and consumer purchasing and behavior via panels, analyst services based on NPD tracking information, topical reports and proprietary research in the industries covered by NPD.

NPD information is available for a broad range of industry sectors, including fashion, apparel, sports, technology, communications, entertainment, food, automotive, and home and office.

The firm continues to expand its work with its global retail partners who provide POS store movement information to NPD, now representing almost 700 retail partners with more than 134,000 doors worldwide. These retailers include department stores, mass merchandisers/discount stores, specialty stores, mail-order outlets and e-commerce Web sites. NPD monitors commercial sales of information technology products through an alliance with the Global Technology Distribution Council, whose mem-

bers comprise about 80% of the IT distributor market.

NPD also collects information via the NPD Online Panel of more than 3 million registered members. Nearly 15,000 households also participate in a special subset of the panel who have meters installed on their PCs to monitor online behavior as part of NPD's Digital Insights services.

Other data collection methods include consumer diary panels, manufacturers' shipments and related surveys.

NPD has offices in 20 cities around the world, spanning the Americas, Europe and Asia.

In Canada, NPD offers information for the automotive, consumer electronics, IT, entertainment, apparel, footwear, food and beverage, and foodservice industries; in many cases, consumer information is collected from NPD's Canadian online panel. In Mexico, NPD's primary business is tracking the consumer electronics market.

In Europe, NPD offers information for the following industry sectors: athletic footwear, beauty, foodservice, licenses, sports apparel, sports equipment and toys. Tracking services are provided in 11 European countries.

In Asia, foodservice and restaurant tracking services are available in Japan, as well as casual wear market tracking; NPD also maintains an online panel to support foodservice tracking and ad hoc work in Japan.

In 2005, NPD expanded and enhanced services in a number of industry sectors through strategic acquisitions. In the fashion

sector, NPD acquired STS Market Research and the online longitudinal consumer panel, AccuPanel. NPD also acquired TNS's Italian perfumery business, becoming the leading provider of selective beauty information in Europe. Consumer electronics and IT acquisitions included DisplaySearch, the leading provider of information on flat panel displays, and ACNielsen's Canadian IT tracking business.

Also in 2005, NPD introduced Market Insights, market analysis based on NPD Consumer Technology data. The firm launched new services for the wireless industry, introducing Mobile Phone Track and a series of topical reports for the industry.

In 2006, NPD plans to continue building and enhancing services worldwide, including expansion of its data services (weekly and at the regional and market level).

NPD's joint ventures include a series of companies owned by NPD and GfK AG, operating retail tracking services in Europe, the Americas, Japan and the Pacific Rim for consumer electronics, household durables, cameras and IT industries. The firm also partners with GfK in OzToys, a retail tracking service covering toys, video games and software in Australia. In Latin America, NPD investments include consumer purchase panels in nearly all Latin American countries, operated through LatinPanel, a joint venture with IBOPE Group and Taylor Nelson Sofres plc.

NPD has about 875 full-time employees,

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with 700 in the United States (620 full-time exempt) and 175 outside the United States.

15



SHORT

OPINION RESEARCH CORP.
www.opinionresearch.com

Opinion Research Corp. (ORC) in Princeton, N.J., was founded in 1938 and has been a public company since October 1993. Chairman and CEO of ORC is John F. Short, 62. U.S. research-only revenue in 2005 was \$94.5 million, up 3.0% over 2004. In 2005, 37.4% of total research-only revenue, or \$56.4 million, was from work conducted outside the United States. Total research and nonresearch revenue in 2005 was \$190.2 million. ORC is a research, consulting and information services company offering multinational corporations and governments mar-

ket intelligence and social research on a global scale, with particular emphasis on global business-to-business markets and social research. ORC has conducted studies in more than 100 countries across six continents, operating 19 wholly owned offices in the United States, Europe and Asia. The firm's services include advanced analytics and data mining, communications and marketing services, corporate reputation and branding, customer loyalty and retention, data collection and processing, demographic and health research, employee surveys, information technologies, management consulting, market assessment, training and educational technologies. ORC has a significant presence and reputation in the automotive, consumer goods and services, energy, financial services, health care, information technology, retail and trade, and telecommunications industries as well as with international development organizations. The company offers a number of syndicated research products. These include CARAVAN, its twice-weekly consumer telephone omnibus survey; Customer Loyalty Plus, its system for measuring and building customer loyalty; and ORC Overnight, which enables clients to receive Internet or telephone results the following day. ORC has eight central telephone interviewing centers with a total of 657 CATI-equipped interviewing stations in Burlington, Vt.; Plattsburgh, N.Y.; Reno, Nev.; St. Albans, Vt.; Tucson, Ariz.; London; Hong Kong; and Taipei, Taiwan. All European

interviewing is done through the London center, which is staffed with native speakers of 17 major European languages. In total, research professionals at ORC are fluent in more than 70 languages. Interviewing is conducted regularly in the Pacific Rim, Europe and the Americas. The company has 550 full-time employees in research in the United States.

16



SACKMAN

LIEBERMAN RESEARCH
WORLDWIDE
www.lrwonline.com

Lieberman Research Worldwide (LRW), based in Los Angeles, is a privately held corporation founded in 1973. Arnold Fishman, 61, is the founder and chairman of LRW, and David Sackman, 48, is president and CEO. Fishman earned a B.S. at Brooklyn College, City University of New York, and Sackman earned a B.A. at the University of California at Los Angeles. U.S. revenue in 2005 was \$65.8 million,

down 2.1% from 2004. In 2005, \$9.9 million, or 13.1% of total revenue was generated outside the United States. LRW is a full-service custom market research provider with extensive experience across diverse industries, including entertainment, technology, automotive, pharmaceutical and health care, retail, foodservice, financial and business services, and packaged goods. The firm conducts research in 71 countries worldwide. LRW operates from a consulting-partnership model, learning clients' industries and business needs to solve immediate problems and develop long-term strategies. The model is based on experienced executives from academia, consulting, advertising, marketing and marketing research. It includes an in-house Advanced Analytics team that provides expertise in conjoint, choice, latent class and Hierarchical Bayes modeling, price testing and optimization, demand forecasting and modeling, market segmentation, brand positioning and other custom techniques. LRW emphasizes four core areas of research:

- ◆ Strategy Development: In segmentation research, the firm determines targets, optimizes marketing mix and develops strategies to maximize performance within target segments that drives business impact. It also deploys techniques and analytic
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processes to understand where value resides within brands along with the implications for brand-building. Strategy expertise is LRW's core strength.

◆ **CIA Approach to Tracking:** Launched in 2005, LRW's CIA to Approach to Tracking uses consistency procedures and research processes that generate insight from the data while ensuring actionability of the findings. This approach is applied to brand, advertising and customer satisfaction research initiatives.

◆ **New Product Development:** Lieberman Laboratory starts with a market segmentation to understand the target markets, then uses Ideation, a structured brainstorming method to create a large number of potential concepts. These concepts are refined through Evolution, an iterative series of focus groups and concept redevelopment stages to shape the most highly appealing new product concepts.

◆ **Actionability Workshops:** LRW offers Actionability Workshops to actively engage key client stakeholders in the research process to generate concepts, strategies and action plans that can affect their business. This creative, engaging process is used to develop and implement actionable strategies to drive marketing and business change.

In 2006, LRW will launch a new approach to analysis and reporting, Lieberman Learning Labs, based on the Theory of Multiple

Intelligences. The firm will continue to develop and deploy its technology infrastructure, including a robust EDP system and new online technology tools. The company plans to open a China office in late 2006.

LRW employs 318 full-time U.S. employees. Data collection facilities include five telephone centers with 625 CATI-equipped stations and the capability to conduct interviews in more than 65 languages. A focus group facility in Los Angeles is able to conduct supergroups with as many as 50 participants. In addition to its Los Angeles headquarters, the firm has offices in London, New York, Chicago, Charlotte, N.C., and Orange County, Calif.

17



KNOX

ABT ASSOCIATES INC.

www.abtassociates.com

Abt Associates Inc. in Cambridge, Mass., is an employee-owned company founded in 1965.

Wendell J. Knox, 58, is president and CEO of Abt Associates. He earned a B.A. at Harvard University.

U.S. research-only revenue in 2005 was \$52.2 million, up 25.8% over 2004. Total research and nonresearch revenue in 2005 was \$187.2 million.

Abt is a full-service research and consulting firm whose research activities include marketing research for government, business and consumer clients. Combining research and consulting services, Abt Associates tailors individual services and strategies to help clients identify, understand and respond to issues and opportunities.

Research for business-to-business and business-to-consumer clients is carried out through the firm's Business Research and Consulting practice, which uses custom research to address business issues with a strong emphasis on improving business results and ROI. The practice focuses on financial services, information technology, telecommunications, health care, transportation and manufacturing, and uses both traditional and Internet data collection techniques.

Abt provides a full range of survey research capabilities, from sample design and instrument development, through data collection and data management and processing, to data analysis. The firm's emphasis on technical quality ensures confidence in measuring effectiveness, launching new products and improving customer satisfaction.

Besides its Cambridge offices, the firm

has U.S. offices in Bethesda, Md., and Chicago. Abroad there are offices in Africa, Asia, Central Asia, Europe, Latin America and the Middle East. It has 1,100 full-time employees, of which 200 work full or parttime on its research services.

18



FULGONI

comScore NETWORKS INC.

www.comscore.com

comScore Networks Inc. (cS), based in Reston, Va., is a private company founded in 1999.

Gian Fulgoni, 58, is chairman of cS and Magid Abraham is president and CEO. Fulgoni earned a Masters in Marketing at the University of Lancaster in the United Kingdom.

U.S. revenue for 2005 was \$44.9 million, up 19.7% over 2004. In 2005, revenue generated outside the United States was \$5.6 million, or 11.1% of total revenue. The

growth rate includes 2004 and 2005 revenue of Q2 Brand Intelligence, acquired August 2004.

cS continuously measures the behavior of a cross-section of consumers numbering more than 2.5 million people. It also uses a database of 3.5 million households who participate in survey research and who can be reached via e-mail or pop-up survey invitations that can be triggered by panelists' online activities. The firm's samples have been built according to statistical sampling methodologies, and encompass consumers at home, in the workplace, at universities and outside the United States.

Using the information collected from these databases, cS provides information, research and consulting services through four divisions:

- ◆ comScore Insights 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. Services address business issues such as consumer segmentation, customer satisfaction, product and advertising evaluation, and brand performance tracking.
- cS conducts survey research among consumers that are elusive and/or extremely expensive to measure, and segments survey responses and analyses based on actual observed behavior.
- In March 2005, cS was licensed by Catalina Marketing Corp.'s Marketing Network for its Behavior Activated Research (BAR) service to target consumers to participate in survey research and focus groups—based on their buying of specific products as measured by point-of-sale UPC scanners in 18,000 supermarkets—for new product studies, concept tests, customer satisfaction studies and more.
- In February 2006, Catalina licensed cS its BAR Rx service that issues invitations to potential research respondents in more than 12,600 pharmacies based on their prescription drug purchases.

Other units include:

- ◆ comScore SurveySite (CSS), created through the acquisition of Toronto-based SurveySite in January 2005, offers a number of research methods as well as a 200,000-person U.S. survey sample.
- ◆ comScore Marketing Solutions (CMS) provides customized purchase information and consulting services in a variety of vertical industries, including automotive, travel, pharmaceutical, retail, financial services, telecommunications, media and entertainment, consumer packaged goods and technology. cS technology captures details of consumer transactions at every site.
- ◆ comScore Media Metrix (CMM) reports details of online media usage, visitor demographics and online buying power for the home, work and university audiences across 101 local U.S. markets and across the world, including detailed reporting for dozens of countries. The division offers tools for reach and frequency analysis, daypart planning, online and offline local market analysis and emerging applications. CMM also provides a suite of search tracking and planning reports in addition to audience measurement data for streaming video and radio, the latter in conjunction with Arbitron Inc.

cS data and services support several applications, including market and competitive intelligence for any online category; benchmarking and opportunity gap/SWOT analysis; customer profiling and segmentation models; integration and study of online behavioral data with offline purchase data;

choice models based on pricing, taxes and promotions, among other factors; controlled, accelerated testing of interactive marketing programs; and scoring of customer files for direct marketing programs, using markers and propensities derived in aggregate within the cS database and applied using shared attributes. Its e-commerce sales data have been widely published in the media for more than five years.

cS has 277 full-time U.S employees and 345 worldwide in offices in Reston, Va., Chicago, New York, San Francisco, Seattle, Toronto and London.

19



MORRISON

MARKET STRATEGIES INC.

www.marketstrategies.com

Market Strategies Inc. (MSI) in Livonia, Mich., is a privately held company founded in 1989.

Andrew J. Morrison is chairman and CEO of MSI. Jan Brown is president and Reg Baker is COO. Morrison, 51, earned a Ph.D. in Mass Communications Research at the University of Michigan.

U.S. revenue in 2005 was \$43.0 million, up 13.5% over 2005. Revenue generated outside the United States in 2005 was \$1.5 million, or 3.4% of total revenue.

MSI is a full-service research company with

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experience working with healthcare providers and insurers, pharmaceutical companies, energy companies, technology and telecommunications clients, financial services and insurance clients, government agencies, and clients concerned about national policy issues in the healthcare, energy, communications and technology sectors.

MSI offers a suite of products that includes MSImpact Modeling, a structural equation modeling system for customer satisfaction, customer relationship management and marketing programs; MSIInnovation, a new product optimization and simulation approach involving choice modeling; MSTargets, which combines multiple platforms of needs, attitudes, geodemographic and behavioral data to select market segment targets; and the Perception Analyzer, MSI's dial-based interactive group testing system. MSI's MSInteractive subsidiary manufactures the Perception Analyzer systems and software and sells or leases the equipment to clients worldwide. The firm provides each client with a secure, extranet portal and analytical tools through its MSI-Client software.

More than 40% of MSI's business involves customer satisfaction and loyalty measurement based on MSImpact Modeling. The balance is divided among new product development and market assessment studies; market segmentation studies; communications and advertising research; and general public opinion and opinion leaders studies. The firm's projects are evenly split between consumer and business-to-business research.

Almost 20% of MSI's studies are qualitative in nature, including traditional and online focus groups, Perception Analyzer sessions and in-depth interviews with hard-to-reach business decision-makers. Twenty-four percent of MSI's '05 studies were conducted using Web-based methodologies, which were completely supported by the

firm's own internal Internet research unit.

MSI and its subsidiaries employ 175 full-time staff and more than 400 part-time staff in five locations. The company has 165-networked CATI stations, including facilities in London, Ontario, Canada; and Portland, Ore. Client service offices are located in Livonia, Mich.; Portland, Ore.; northern N.J.; Indianapolis and Alexandria, Va.

20



VAN LEFFERDINK

MVL GROUP INC.

www.mvlgroup.com

MVL Group Inc. (MVL), based in Jupiter, Fla., is a privately held company formed as a holding company in 1998 and majority owned by Allied Capital Corp. in Washington, D.C.

M. Van Lefferdink is CEO of MVL and Adam L. Rogers is president and chief operating officer. Van Lefferdink, 56, has a B.A. from DePauw University.

U.S. research revenue for MVL's full-services research units in 2005 was \$38.7 million, up 10.6% over 2005. Total revenue of MVL in 2005, including data collection and online units, was \$65.3 million.

MVL full-service marketing research companies include:

◆ Marketing Research Services Inc. (MRSI) in Cincinnati, acquired by the MVL

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in May 2005, provides custom research services for clients in consumer goods, pharmaceuticals, healthcare, retail and the restaurant industries.

Its PRISM system uses quantitative and qualitative research tools to guide clients through one or more stages of product development. The system is composed of four stages that follow the product development process: market understanding, con-

cept development, product development and product management. MRSI's Hispanic research includes an in-house Hispanic research team of moderators, research consultants, analysts and project directors who conduct both qualitative

and quantitative research among Hispanics, including the development of custom panels of Hispanic consumers. In '05, MRSI introduced ENFOQUE, its three-step process for conducting Hispanic research. ♦ Target Research Group (TRG) in Nanuet, N.Y., offers Ad Trac (Advertising Evaluation System) which evaluates TV and print advertising for impact, persuasion and communication; Con Trac for concept screening; Fore Trac that forecasts sales on new products, line extensions and relaunches; Power Trac for optimizing concept and product acceptance and product retention; and Price Trac that identifies optimal pricing for new products.

MVL's online research and data collection companies include:

- ♦ Carbonview Research in Jupiter, Fla., launched in early 2005, which uses a new approach to online research with its proprietary Authenticated Panel based on face-to-face recruitment at mall locations nationwide. This screening method provides access to hard-to-reach targeted consumers and 100% validation.
- ♦ Discovery Research Group in Salt Lake City, which specializes in interviewing and recruiting respondents via the telephone. Since its inception in 1987, DRG has grown to become one of the largest opinion and marketing research field service firms in the United States.
- ♦ PhoneBase Research in Fort Collins, Colo., has conducted millions of telephone interviews involving research into virtually every U.S. industry since its founding in 1994.
- ♦ Quick Test/Heakin, a mall-based data collection network, has 60 nationwide locations centrally linked to its corporate office in Jupiter. It was created in 1999 by combining two companies in the mall-intercept data collection industry: Quick Test Inc. and Heakin Research Inc.

MVL has 400 full-time and 2,000 part-time U.S. employees. MRSI and TRG have 106 full-time employees.

21



BAUMGARDNER

BURKE INC.

www.burke.com

Burke Inc. (BI), based in Cincinnati, was founded in 1931, and has been an independent, employee-owned company since 1989. About 70% of its shares are held in an Employee Stock Ownership Plan (ESOP). BI's president and CEO is Michael Baumgardner, 55. He earned a Ph.D. at Ohio State University. U.S. revenue in 2005 was \$37.1 million, unchanged from 2004. In 2005, \$5.7 million, or 13.3% of total revenue, was from outside the United States. BI is a full-service marketing research firm using advanced analytical techniques and technology to provide decision support services across all major industry sectors. Its experience in defining problems, developing research designs, executing complex studies, analyzing data and interpreting

results makes the most informed decisions possible.

Over the years the firm has expanded its core research competencies in response to emerging trends, such as customer loyalty, linkage and integration, and employee-related research. BI's core competencies are supported by internal research and development programs.

Marketing research and consumer insights education is provided through the Burke Institute, which has trained more than 70,000 participants from 10,000 companies, through more than 3,000 public and in-house customized marketing research seminars in 39 different countries. Seminars cover such research topics as general marketing research, qualitative and online research, questionnaire design, customer loyalty, analytical tools and techniques, advanced multivariate analysis, and linkage and other modeling techniques.

Primary areas of focus include:

- ◆ Custom Marketing Research provides analysis and consulting for consumer and business-to-business companies to understand marketplace dynamics worldwide. Services include product testing, brand equity research, pricing research, market segmentation, image and positioning studies, and a wide range of marketing research protocols targeted at both tactical and strategic business issues.
- ◆ Customer Loyalty & Relationship Management helps clients develop and deploy customer loyalty and relationship management systems that focus internal resources on customer requirements.
- ◆ Employee Engagement & Retention represents the strength of the overall connection between the employees and the organization, and includes commitment, involvement, relationships and initiative.
- ◆ Linkage & Integration focuses on where to invest limited resources to optimize process effectiveness, employee commitment, customer retention and business results.
- ◆ Online Research & Reporting provides Web survey design and data collection using the Internet. Its Digital Dashboard online reporting provides secure, real-time access to survey findings. BI also provides moderating of online focus groups.
- ◆ Burke Qualitative division is experienced in using the full range of qualitative formats including focus groups, dyads, triads, mini-groups and one-on-ones. Moderators are versed in laddering, ethnographic research, scripting, and a variety of other qualitative and projective techniques.
- ◆ International Research makes custom research and other research services available worldwide.

Burke has 198 full-time employees and 136 part-time employees.

22



ZALIS

OTX

www.otxresearch.com

OTX, or Online Testing Exchange, in Los

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

Shelley Zalis is CEO and co-founder of OTX and Kristin Luck is executive vice president, operations and co-founder. Zalis, 44, holds a B.A. from Barnard College.

U.S. revenue in 2005 was \$33.2 million, up 11.4% over 2004.

OTX is a consumer research and consulting firm that has established itself as a provider of online research. Its clients are many blue chip companies within the marketing, advertising and entertainment

industries.

OTX is a blend of traditional market research experience and technical expertise that has created a portfolio of products and tools with access to more than 50 million nationally representative online respondents in its panel, OTX Survey Exchange. OTX specializes in understanding the impact of both traditional and emerging media as well as evaluating the convergence of brands and entertainment. It has developed new methods for executing studies that make online surveys more engaging, increase respondent satisfaction, improve

cooperation rates and lower research costs.

OTX's entertainment industry services include testing for movie creative, trailers and Web site appeal and effectiveness. Its CPG industry services include testing of advertising, packaging and new product concepts. A virtual online store provides client testing of and feedback on product packaging and pricing.

OTX has 134 full-time employees and offices in Los Angeles, New York, Cincinnati and London.

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BROOKS

DIRECTIONS RESEARCH INC.

www.directionsresearch.com

Directions Research Inc. (DRI) in Cincinnati, is a privately held company founded in 1988. Ownership consists of 15 members of DRI's senior staff.

Randy Brooks, 58, is DRI's founder and president. He earned an MBA at the University of Cincinnati.

U.S. revenue in 2005 was \$33.1 million, up 21.3% over 2004.

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 dedicated client teams. DRI's client service staff averages 20 years of experience.

DRI provides custom services, including many product and concept testing systems.

The firm also regularly executes a wide variety of studies, including market segmentation, conjoint/discrete choice, awareness tracking, attitude and opinion, market structure and customer value/customer satisfaction.

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

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

Since its introduction in '02, DRI has been using Navigator, a product-testing norms database in which results have been compiled from a broad array of more than 4,000 food and other consumer packaged goods tests conducted over the past 10-plus years. This tool, developed with assistance from the University of Georgia, provides guidance for product test research design and adjusts for the effects of common design elements on any of the frequently used scales.

New to DRI in '05 was an effort to significantly expand its technology practice and ability to conduct research projects in the international arena. The firm plans to build a practice that is highly consultative and focused on developing unique approaches and techniques designed to meet the needs of this research community.

DRI has placed senior client service staff in close proximity to key account clients with offices in Chicago, Charleston, S.C., Dallas and Detroit. In '06, DRI will actively consider similar expansion in other markets.

DRI employs a full-time professional staff of 115.

24



GRAHAM

KNOWLEDGE NETWORKS INC.

www.knowledgenetworks.com

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

KN is led by the office of the president,

including Patricia Graham, 53, executive vice president, client services & business development; Michael Floyd, 47, chief technology officer; and Bruce Newman, 52, interim CFO. Graham earned an M.A. in Political Arts at Rutgers University.

U.S. revenue for 2005 was \$31.4 million, up 4.4% over 2004.

KN offers a set of consumer research services that brings together consumer research capabilities, including the only Web-enabled research panel created using a nationally representative RDD sample; a community-based online capability that offers quantitative and qualitative research into early adopters of brands via an alliance with Morefocus Group Inc.; a panel of 1 million frequent shoppers available for research; and a call center for media research and panel recruitment. The company provides design, execution, advanced analytics and reporting based on these services.

The firm specializes in media, brand health, claims and message testing, segmentation and research on pricing, product configuration, advertising, public opinion, social issues, pharma/health and financial services.

KN also maintains an extensive program of research on research, studying the ways that different research methods—including panel creation and maintenance—can directly affect the information marketers use to make decisions. Using this knowledge, KN advises clients about strategies and tactics to retain existing customers and win

new buyers given fragmenting media, ubiquitous advertising and many brand choices in a wide range of channels.

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

25



WARD

MORPACE INTERNATIONAL INC.

www.morpace.com

MORPACE International Inc. (MPI), based in Farmington Hills, Mich., is a privately held corporation founded in 1941.

Francis J. Ward, 60, is the chairman and CEO of MPI, and John P. McDonald, 54, is president. Ward earned a B.A. in Marketing at Wayne State University, and McDonald earned a D.B.A. at University of Kentucky.

U.S. revenue in 2005 was \$29.3 million, down 5.8% from 2004. In 2005, 14.6% of total revenue, or \$5.0 million, was generated from work conducted outside the United States.

MPI is a practice-based full-service survey research and consulting firm with a diverse client base, broad industry experience and the global capability and cultural diversity required to conduct research worldwide. The firm offers a full range of research services, including problem identification, custom research design and data collection. Data analysis and decision-focused interpretation are reported using a number of tools and approaches.

Client sectors include automotive, consumer packaged goods, financial and insurance services, health care, retail, technology and transportation.

MPI is experienced in product design, development and marketing; advertising concept development and evaluation; brand image and equity measurement; communication research, satisfaction and loyalty modeling; market segmentation; decision tool development and application, and multilingual, cultural and ethnographic measurement. Recent introductions include:

- ◆ Retail Effectiveness Assessor—The REA platform provides retailers, banks and distributors with real-time facility evaluation and mystery shopping capabilities using GPS technology combined with sector expertise for quick turnaround and comprehensive assessment of retail locations.
- ◆ SOCO (Strategic Optimization of Complex Offerings)—A new approach to developing optimal offerings in situations where the number of possible service or feature combinations is very large. The SOCO process is a method of modeling customer choice when faced with complex decisions that is applied to optimizing customer satisfaction and corporate profitability in products such as automobiles, healthcare plans,

new home building and telecommunications.

Analytic and insight services are made available to MPI's practices through its Marketing Sciences Group and its Qualitative Methods Team. These teams develop and implement approaches such as discrete choice modeling, segmentation, database modeling and hybrid ethnographic-survey methods.

MPI has used the Internet for both b-to-b and b-to-c research since 1997. One of MPI's Internet capabilities is the Lighthouse Inter-

net data collection and processing system that provides development, tracking and reporting tools, and executes Internet research in virtually any language. The firm delivers research results, reports and databases using Web-based interactive tools.

MPI data processing is supported with a database system linked with software for tabulation or advanced analytics. Data processing systems are developed in-house and customized to serve individual client needs.

MPI executes globally large-scale Internet, telephone, mail, IVR and central location studies using qualitative and quantita-

tive techniques. The firm has also developed intuitive PC and Internet-based cross-tabulation systems for use by MPI clients. In addition to custom survey capabilities, MPI has developed a set of tools to ensure consistent, high-value results from continuous and other tracking studies.

MPI has 150 full-time and more than 400 hourly employees. MORPACE International Ltd. in the United Kingdom has eight full-time employees. MPI's focus group facility, newly renovated, is located in Farmington Hills, Mich.

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LOOK TO THE LEADER!

www.marketingpower.com

AMA'S HOME ON THE
WORLD WIDE WEB

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26



HAYS

NATIONAL RESEARCH CORP.

www.nationalresearch.com

National Research Corp. (NRC) in Lincoln, Neb., was founded in 1981, and has been a public company since October 1997. Michael D. Hays, 51, is NRC's president and CEO.

U.S. revenue in 2005 was \$28.7 million, up 5.2% from 2004. In 2005, \$3.7 million, or 11.4% of total revenue, was from outside the United States. The growth rate excludes 2004 and 2005 revenue of Geriatric Health Systems LLC, acquired September 2005.

NRC offers performance measurement and tracking and improvement services to hospitals, healthcare systems, physicians,

health plans and other healthcare organizations.

NRC provides three primary types of information services:

- ◆ The NRC + Picker Group provides the most important aspects of the patient experience by combining the advance measurement and improvement technology of NCR with the philosophy and family of surveys of the Picker Institute. The eToolkit allows clients to act on their research results and attain improvement in the care delivery process. In addition, NRC Custom Research

measures market characteristics or issues specific to individual healthcare organizations, including consumer recall of promotional and branding campaigns, consumer response to new service offerings and provider perception of health plans and healthcare organizations.

- ◆ The NRC Healthcare Market Guide is an annual study of more than 140,000 households evaluating consumers' perceptions of and satisfaction with hospitals, health systems and health plans in more than 160 markets across the country. The guide provides consumer satisfaction ratings for medical care, access and administrative services on more than 800 health plans. Consumer quality perceptions, product-line preferences, service use and visit satisfaction are available for 3,000 hospitals and health systems by name. The guide also studies household health status, presence of more than 20 chronic conditions, alternative medicine use and other health behaviors.
- ◆ The Picker Symposium Educational Products provides a way of bridging the gap between measurement and improvement of patient-centered care, and consists of the Picker Institute International Symposium, the Learning Network and eLearning.

In '03, NCR acquired Smaller World Communications in Toronto, which provides performance measurement services for healthcare organizations in the Canadian market.

NRC has 127 full-time and 71 part-time employees. Sales offices are in Lincoln, Neb., Herndon, Va., and Toronto and Montreal.

27



BARRISH

ICR/INTERNATIONAL COMMUNICATIONS RESEARCH

www.icrsurvey.com

International Communications Research (ICR) 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.

ICR's president and CEO is Gil Barrish, 65. He earned a B.S. in Business Administration & Economics at Temple University.

U.S. revenue in 2005 was \$28.3 million, down 2.4% from 2004. In 2005, 2.1% of total revenue, or \$600,000, was from outside the United States. Total research and nonresearch revenue for ICR in 2005 was \$33.9 million.

ICR is a full-service market research specializing in customized design with in-house resources to create complex studies; conduct interviewing; analyze data using the latest multivariate techniques; and deliver research findings and recommendations. Among the types of studies ICR conducts are customer satisfaction and loyalty research; segmentation; product development; marketing evaluation; and image and advertising effectiveness for its consumer and business-to-business clients.

Types of analytical methods ICR employs include segmentation, CSM, discrete choice and structural equation modeling, among others.

Industries in which ICR has experience include technology, finance, entertainment, retail, nonprofit, health care, business services, utilities, media, public opinion and social research. ICR also specializes in multi-cultural research and has expertise in researching low-incidence populations. ICR is a provider of omnibus research services, including:

- ICR EXCEL*: a twice-weekly sample of 1,000 adults ages 18 and older;
- TeenEXCEL*: conducted monthly among 500 teens ages 12 to 17;
- HispanicEXCEL*: ICR’s monthly omnibus targeting a nationally representative sample of 1,000 Hispanics;
- ICR CENTRIS*: a monthly sample of 4,000 adults providing an extensive inventory and trend data on the use of technology and entertainment in the home.

ICR has three interviewing facilities—two in Pennsylvania and one in Nevada—and maintains a dedicated Web portal for Internet studies. The firm has 151 full-time employees and more than 375 part-time employees.

28



ENGEL

EXPERIAN RESEARCH SERVICES

www.smrbs.com

Experian Research Services (ERS), based in Deerfield Beach, Fla., was formed in December 2005 as the market research unit of Experian Marketing Solutions, owned by Experian, Nottingham, U.K. William E. Engel, 58, and William P. Livek, 51, are co-presidents of ERS. Engel earned a B.A./B.S. from the University of Alabama, and Livek earned a B.S. in Broadcast Marketing/Research & Political Science at Southern Illinois University. U.S. research-only revenue for 2005 was \$23.5 million, up 29.5% over 2004. ERS revenue includes Simmons Market Research Bureau and excludes Vente Inc. Experian Marketing Solutions Group revenue was \$66.5 million. ERS is a full-service, consumer research organization within Experian Americas, using a variety of state-of-the-art measurement techniques combined with more traditional measures of the population. It provides a view of the American consumer, from the products they buy, the brands they prefer, where and when they shop, their lifestyles and attitudes and the communications channels that best reach them. With monthly updates on consumer preferences from its 200,000-plus monthly sample, ERS provides ongoing, thin-slice discriminations of fast-moving trends in consumer behavior. It focuses on global capabilities in information, targeting and multichannel communication, with the ability to share data assets and best practices in analytics and strategic consulting across all of Experian’s Global businesses. ERS includes Simmons Market Research Bureau (SMRB), founded in 1962 and acquired by Experian in October 2004, and Vente Inc., founded in 1999 and acquired in August 2005.

Simmons Market Research Bureau SMRB is a provider of consumer-centric, media-neutral product purchase, shopping and media usage behavior which annually surveys more than 30,000 people to produce detailed demographic, psychographic, lifestyle and attitudinal descriptions in the National Consumer (Adults), Teens, Kids and Hispanic Studies. Each of these reports provides individual and household information on almost 8,000 brands in more than 460 lifestyle and demographic categories.

The Simmons National Consumer Study is accredited by the Media Research Council. SMRB’s BehaviorGraphics and other segmentation systems provide capabilities to segment consumers by lifestyle, attitudes, shopping frequency and volume, price preference, entertainment consumption, media usage and many other descriptors. Its Integrated Marketing Services unit provides custom media studies and data integrations and specialized data applications using the SMRB databases. Through its affiliation with the Global TGI Network, SMRB has

access to worldwide “Simmons-styled” consumer research in more than 42 countries. SMRB employs 80 full time in its Florida and New York offices.

Vente Inc. Vente serves the direct marketing and market research industries with its proprietary online database of American consumers that includes more than 27 million members with more than 4,000 data points per member. Each month, more than 200,000 general

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and low-incidence surveys are completed by consumers on Vente’s survey platform. A provider in the self-reported permission marketing industry, Vente maintains in-depth and accurate consumer data and reaches even the most hard-to-find prospects.

29



McDONALD

NATIONAL ANALYSTS INC.

www.nationalanalysts.com

National Analysts Inc. (NA) in Philadelphia, was established as the market research unit of Curtis Publishing in 1911 (publisher of *The Saturday Evening Post*), became a separate privately owned corporation in 1943, and reorganized as an employee-owned company in 2004.

Susan Schwartz McDonald, 56, is chair-

man and CEO of NA. She earned a Ph.D. at the University of Pennsylvania’s Annenberg School.

U.S. revenue in 2005 was \$23.3 million, up 4.5% over 2004.

NA is a market research and consulting firm that addresses business issues in a wide range of industry sectors, including pharmaceuticals, information technology, financial services, package transport and consumer goods. Its depth of marketing experience in key industries, combined with custom market research capabilities, makes NA a hybrid organization, providing services ranging from problem conceptualization to strategy development and implementation.

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

Project leaders are supported by an in-house team of methodologists and a portfolio of modeling tools that are readily cus-

tomized to address marketing problems. Its own NA-Quest Web software enables complex survey design.

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

On record as the world’s oldest marketing research entity, NA is a founding member of CASRO. It employs 77 professionals full time.

30



LISTER

DATA DEVELOPMENT WORLDWIDE

www.dataaw.com

Data Development Worldwide (DDW) in New York is a privately held corporation

founded in 1960 that was sold to two senior managers in 2005.

Chip Lister and Kim Knepper are managing directors of DDW.

U.S. revenue in 2005 was \$22.6 million, up 23.5% over 2004.

DDW is a full-service custom marketing research company whose emphasis is on four areas: large strategic studies including market structure and segmentation; development and optimization using choice modeling to affect loyalty, brand equity, price elasticity, product, packaging and positioning; customer and employee satisfaction measurement; and brand and advertising tracking.

Field operations cover Internet, telephone, central location, all forms of personal interviewing and mail. Market target measurement encompasses consumer and business-to-business as well as specialty targets, including C-level corporate, healthcare practitioners and senior professionals.

The company has put in place methods against a range of marketing and communications issues, using market research best practice solutions. They include:

- ◆ Brand DDW: These are tools to address brand equity using methods to evaluate company or brand market position, to look at potential, and to explore elasticity. Tools are geared toward competitive advantage, brand extension and brand reposition.
- ◆ Satisfaction DDW: Brand and service delivery measurement tools have been designed to gauge both absolute levels of

delivery and value so as to optimize the costs of doing business. Measurements are used proactively to create service pathways that are least cost-prohibitive on service deliverables, while maximizing overall reaction to the company and the brand.

◆ Positioning DDW: To enhance the positioning of the core brand, or individual products and services, methods have been developed to streamline and make more exacting the process by which brand and product positioning evolves.

◆ Price DDW: Methods in pricing are tailored to consider either looking broadly at the effect of price on the brand, or in a more targeted way to develop elasticities that allows optimization “at the shelf.”

◆ Development DDW: A series of methods have been designed to optimize the developmental process by facilitating the process by which ideas are generated and the ways in which they are considered prior to market rollout. In each of these, the action standard is ROI, so that there is a clear designation of which products offer maximum potential for full development.

◆ Optimization DDW: Coupled with both the development and the pricing methods, these tools are meant to optimize either new or existing products and services. Analytic approaches have been developed to present these data in a way that is comprehensible, acceptable to marketing, and ready to be acted on in taking the products to market.

DDW has varied and extensive sector experience across packaged goods, services and durables. The company has a long history of implementing research in media and communications, telecommunications, consumer products, financial services, non-alcoholic and alcoholic beverages, travel and tourism, food services, food products and pharmaceuticals.

The firm has 85 full-time employees. All research implementation and analytic services are provided in-house. Statistical services and modeling are conducted by the firm’s Advanced Analytics group. DDW most recently opened an office in San Francisco and also has offices in Albany, N.Y. There are near-term plans to open offices in both Western Europe and Asia.

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LEFKOWITZ

LIEBERMAN RESEARCH GROUP

www.liebermanresearch.com

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

LRG’s chairman and CEO is Mark Lefkowitz, 59, and its president is Stephen Miller, 51. Lefkowitz earned a B.A. at City College of New York, and Miller earned a B.A. from the University of Michigan.

U.S. revenue in 2005 was \$22.4 million, down 10.8% from 2004. In 2005, \$900,000, or 3.9% of total revenue, was from outside the United States.

LRG is a full-service marketing research and consulting company specializing in customer satisfaction, advertising and communications, tracking, strategic and tactical research. The company’s clients include consumer and business-to-business companies involved in services and packaged goods. Its client base spans telecommunications, banking and finance, travel, leisure, health care, transportation, retail and food services.

The company has expanded its international capabilities by becoming the U.S. member of the International Research Alliance, a global network of 16 companies in Europe, Latin America and Asia, providing design and interviewing worldwide.

LRG is composed of specialized business units devoted to study design and analysis, data collection and data management. Each operates independently, but they work together on studies as a team. Clients get

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COMING AUG. 15
EXCLUSIVE HONOMICHL GLOBAL 25:
THE **WORLD’S** TOP
MARKETING RESEARCH FIRMS
ONLY IN *MARKETING NEWS*

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hands-on service, and senior-level research professionals are directly involved in every step of the research process. LRG has an analytic group with expertise in market segmentation, choice modeling and predictive modeling and forecasting.

LRG’s main products include the following:

◆ PDA Research is a data collection technique that uses handheld computers (for

example, Palm Pilot or Pocket PC) to conduct personal interviews anywhere at any time. Survey data are uploaded from handheld computers to the Internet, with results viewable in several hours on a secure Web page, compared with several days or weeks on paper.

◆ 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, more efficient media mix and suggestions for more creative advertising.

◆ Choice Using Simalto is a tool for trade-off analysis, which can accommodate up to 36 features, with nine options per feature. Simalto predicts consumer preferences for both potential and existing competitive products.

◆ STELA (Satisfaction Tracking Evaluation and Loyalty Assessment) is a customer assessment tool enabling clients to better understand the retention potential and acquisition power of their brands. Results are used to allocate resources to increase loyalty, aid in relationship-building and evaluate the effect of retention programs.

The company has 76 full-time employees and 256 part-time employees, with full-service offices in New York and Great Neck, N.Y. Data collection capabilities include a telephone center with 225 CATI-equipped stations with speed-dialing option, using CfMC Survent, and continuous interviewing in more than 20 foreign languages. Data processing capabilities include a fully staffed facility offering tabulations produced with Quantum software and panel expertise.

32



FLAKE

FLAKE-WILKERSON
MARKET INSIGHTS LLC

www.mktinsights.com

Flake-Wilkerson Market Insights LLC, in Little Rock, Ark., is a privately owned company founded in 1996.

The chair and CEO is Karen E. Flake, and its president is George Wilkerson. Flake, 58, earned a Masters in Interpersonal and Organization Communications at the University of Arkansas.

U.S. revenue in 2005 was \$22.0 million, up 17.0 % over 2004.

Flake-Wilkerson is a full-service marketing research firm with a focus on customer satisfaction and customer value programs. Most commonly conducted types of research include customer satisfaction tracking, competitive value assessment studies, segmentation studies, brand management research and advertising effectiveness. The firm does work both for clients who are based in the United States and have locations and customers worldwide, and for national and regional companies.

In addition to full-service marketing research, Flake-Wilkerson operates its own data collection survey centers to increase the quality, reliability and cost-effectiveness of data collection to support research studies. Domestically, the firm manages five telephone survey centers with more than 450 stations and has Web-based interviewing and data delivery capability, interactive voice response data collection capability and qualitative resources. For clients with a worldwide customer base, it has a network of partner resources that is used for phone, Web and in-person data collection outside of North America.

Most of Flake-Wilkerson’s clients are in service industries that focus on customer acquisition and retention. This has led the firm to develop the ability to collect large amounts of high-quality data efficiently, yet still provide actionable and customizable (at their desktop) results back to clients on a daily basis. They have an Integrated Research Center Solution model that has an attractive value proposition for Fortune 200-sized organizations.

Flake-Wilkerson employs 81 full-time personnel and 1,000 part-time interviewers across its locations. The firm has call centers in New York, Nashville, Tenn., North Little Rock and Little Rock, Ark., and additional customer support offices in Atlanta, Denver, Little Rock and New York.

33



KROLL

PERYAM & KROLL
RESEARCH CORP.

www.pk-research.com

Peryam & Kroll Research Corp. (P&K), based in Chicago, is a privately held company founded in 1957.

Beverley J. Kroll, 77, founder, president and CEO of P&K, earned an M.S. in Management at National-Louis University.

U.S. revenue in 2005 was \$20.7 million, down 8.0% from 2004. In '05, \$300,000 or 0.1% of total revenue, was from work conducted outside the United States.

P&K is a full-service market research firm providing qualitative and quantitative services with a special expertise 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, hav-

ing been the developers of the original nine-point Hedonic scale, as well as a children's version of the scale.

P&K Research serves a variety of industries, including food, beverage, restaurant, flavor, fragrance and cosmetics. In 2002, the firm added P&K Healthcare Research to serve the pharmaceutical industry with clinical trial research, site management, Phase I-IV studies, data management and quality of life studies. In '04, P&K opened an office and testing facility in White Plains, N.Y., to serve the needs of its East Coast clients.

P&K conducts a wide range of services, including product research guidance testing, category appraisals, product optimization, product quality audits, claim substantiation, ethnography studies, in-home use studies, product/concept fit studies and more.

P&K's sensory testing experience provides understanding of the product attributes that drive consumer interest. The firm uses its data modeling tools to identify optimal product or service designs, taking into account underlying market segmentation. P&K also conducts advertising claim substantiation research and tests efficacy claims based on behavioral or subjective criteria.

The firm supports its comprehensive array of consumer research services with computerized call centers, telephony systems, focus suites, industrial and residential kitchens, medical suites, exam rooms and a national database of consumers. P&K began

a companywide program of facilities expansion and remodeling in 2005.

P&K has a staff of 104 full-time employees, including project directors, information systems specialists, food scientists, statisticians, psychologists, medical doctors and

registered nurses, as well as 200 part-time employees, which include food technicians, the staff at three call centers, clerical and others.

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MARKETING NEWS' RECRUITMENT CLASSIFIEDS

YOUR FIRST STOP FOR THE
BEST JOBS IN MARKETING

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SHAPIRO

MARKETCAST

www.marketcastonline.com

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

Henry Shapiro, 42, is vice president and general manager of MarketCast. He has an MBA from Harvard Business School.

U.S. revenue for 2005 was \$20.4 million, up 25.2% over 2004.

MarketCast is a research firm serving the

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global entertainment industry. The firm consults on marketing and distribution strategy for hundreds of movie and video releases for a client base that includes most of the major motion picture studios, as well as selected independent studios, producers and TV networks.

MarketCast's research services include positioning analyses, focus groups, advertising testing, tracking studies, recruited screenings, volumetric forecasts, and A&U, brand, segmentation and product launch studies.

It has expertise in the measurement of individual consumer predispositions toward entertainment choices, and in translating such predispositions into predictions about future behavior on an aggregate basis. These include box office projections, volume forecasts for home video sales, or estimates of future entertainment technology penetration.

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

Data collection for its services come from phone, Internet, mall intercept, in-theater research, face-to-face interviews and focus groups. MarketCast employs 27 full time.

35



JAKLIN

C&R RESEARCH SERVICES INC.

www.crrresearch.com

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

Robbin Jaklin, 46, is C&R's president. Jaklin earned a B.S. at the University of Illinois.

U.S. revenue in 2005 was \$20.1 million, up 2.0% from 2004. The growth rate excludes the revenue of Fieldwork Inc., which was split off in January 2004.

The mainstay of C&R's work is qualitative and quantitative research in the consumer market. It has market experience in industries such as consumer packaged goods, financial services, entertainment and media, restaurants and food service, telecommunications and technology, confections and personal care.

The firm offers its services in three specialized business units:

◆ KidzEyes and TeensEyes offer qualitative and quantitative research among kids/tweens/teens. KidzEyes' online panel, KidzEyes.com, a COPPA-compliant panel that taps the opinions of kids 6-to-17 years of age, provides quick and easy access to a representative sample of American kids/tweens/teens and their parents. KidzEyes' panelists provide feedback on concepts, products, promotions, programming, advertising and trends. The online panel offers custom research services as well as monthly omnibus research. The latest addition to the KidzEyes.com services is "Momnibus," for quick and affordable omnibus research with Moms.

◆ LatinoEyes, the firm's Latin American research division, is devoted to offering cultural insights into the Latino market in the United States and Latin America. Based in Chicago, it also offers a research network throughout Mexico and Latin America. New in 2005 is LatinoEyes.com, an online panel made of acculturated and unacculturated Latino consumers. It is led by an experienced bicultural and bilingual research team, and provides both qualitative and quantitative research.

◆ BoomerEyes is focused on the baby boomer segment, now in their peak earning years and beginning the transition into retirement. C&R has conducted research that has enabled it to identify four distinct segments within this group. It is backed by

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more than 40 years of qualitative and quantitative research experience. C&R has 93 full-time employees, including 42 analysts.

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WALKER

WALKER INFORMATION INC.

www.walkerinfo.com

Walker Information Inc. (WI), based in Indianapolis, is a privately held corporation founded in 1939.

WI's president and CEO is Steven F. Walker, 48. Walker has a B.S. in Business and Accounting from Boston University.

U.S. revenue in 2005 was \$20.0 million, down 2.0% from 2004. In '05, 16.0% of total revenue, or \$3.8 million, was from outside the United States.

WI focuses on measuring and managing the relationships businesses have with their customers. The firm helps companies identify new and innovative ways to improve and perfect their methods for gathering and using customer information. Specializing in providing customer loyalty management (CLM) experience, WI helps companies align all aspects of their enterprise with the voice of the customer.

In '05, its Walker Loyalty Report program produced three reports of customer loyalty studies—communications, information technology and national employee loyalty—which demonstrated that companies with high customer loyalty outperformed those companies with low levels of customer loyalty, and documented the link between employee and customer loyalty in a wide range of financial metrics. Another series of

studies, called “The Walker Insight Reports,” demonstrated the financial impact of customer loyalty programs.

Combining consulting and technology with predictive and validated research science and models, WI offers a wide range of products and services. Its CLM software—the Walker SmartLoyalty System—provides the means to leverage customer feedback throughout the enterprise.

WI conducts two client forums offering environments for learning the latest best practices in CLM. Complementing these forums are webcasts and roundtable discussions focused on the latest customer-facing challenges.

In '06, WI plans to produce three Walker Loyalty Reports focusing on semiconductors, e-commerce and wireless service while continuing to develop technology services and broaden its toolkit of products.

WI founded and leads the Walker Information Global Network, an alliance of 17 companies around the world who certify in and distribute WI's techniques. The firm has 159 full-time employees and 88 part-time employees at offices in the United States and Toronto. WI operates two call centers and two focus group research sites.

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37



SCHULMAN

SCHULMAN, RONCA & BUCUVALAS INC.
www.srbi.com

Schulman, Ronca & Bucuvalas Inc. (SRBI), based in New York, is a privately held company founded in 1981. Mark A. Schulman, 60, is president of SRBI. He earned a Ph.D. at Rutgers University. Senior partners include Al Ronca and John Boyle. U.S. revenue for 2005 was \$19.3 million, up 8.5% over 2004. The growth rate includes revenue from Catalina Marketing Research Solutions, acquired in November 2004. SRBI is a full-service global public opinion and marketing research company serving many Fortune 500 companies, financial service and insurance organizations, advertising agencies, media, university researchers, foundations and government agencies. The company, with 135 full-time employees, including 36 project directors and analysts, is organized into six divisions:

- ◆ Analytic and Consulting Division in New York has specialized practice groups in banking and finance, insurance, health care, telecommunications, technology, mass transportation and media research. Industry specialization combined with analytic tools is used in such areas as brand equity, advertising tracking, image and positioning, customer loyalty and satisfaction, and market and customer segmentation studies. SRBI's business-to-business research is conducted in this division.
- ◆ Marketing Insights Division, based in Cincinnati, focuses on integrated strategic research approaches, particularly in the packaged goods, restaurant and retail sectors. It is responsible for SRBI's large-scale customer satisfaction surveys using innovative methods and technologies, including Interactive Voice Response.
- ◆ Public Policy Division in Silver Spring, Md., and New York conducts large-scale surveys and tracking studies for many U.S. federal government agencies, foundations and university researchers. These projects include epidemiological surveys, global healthcare studies, domestic violence and program evaluations. Recently released healthcare studies include "Allergies in America," a survey of more than 2,500 nasal allergy sufferers and 400 doctors.
- ◆ Utilities Division in Ft. Myers, Fla., serves the electric utility industry. Studies include customer satisfaction and loyalty, marketing issues and studies of the impact of industry deregulation.
- ◆ Public Affairs Division in New York is responsible for SRBI's public opinion polling for *Time* magazine, the Annenberg Public Policy Center and other media organizations.
- ◆ Interviewing Services Division in New

York, Fort Myers, Fla., West Long Branch, N.J., and Huntington, W.V., conducts telephone, mail, Internet, interactive voice response, and in-person interviewing for other marketing research firms. The firm has three centralized, fully supervised and monitored CATI facilities with nearly 350 stations, with a specialty in b-to-b. SRBI is a U.S. affiliate of Global Market Research, a consortium of independent research companies in 29 countries, which allows the firm to conduct research throughout the world.

38



HOOPER

GUIDELINE INC.
www.guideline.com

Guideline Inc. in New York, N.Y. (formerly FIND/SVP Inc.) is a public company founded in 1969, and listed on the Over The Counter Bulletin Board. Peter Hooper, 56, is senior managing director of Guideline Market Research. Hooper earned a Ph.D. from the University of Connecticut. U.S. research-only revenue for 2005 was \$18.6 million, down 2.3% from 2004. The growth rate includes the 2004 and 2005 revenue of Atlantic Research & Consulting

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www.marketingpower.com
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Inc. and Signia Partners Inc., both acquired April 2005. Total revenue of Guideline was \$43.0 million in 2005.

Guideline is a single-source provider of customized business research and analysis through its four business areas. It specializes in the industry sectors of health care and pharmaceuticals, financial and business services, consumer products, media and entertainment, industrial and chemicals.

Its four business areas are:

- ◆ On-Demand Business Research, providing on-demand access to a dedicated research team that provides insights and knowledge regarding competitors, markets, technology and new opportunities.

- ◆ Custom Market Research, providing custom quantitative and qualitative research and analysis through advanced techniques, including surveys, focus groups, in-depth interviewing and mystery shopping.

- ◆ Strategic Intelligence, creating intelligence, obtained from unpublished sources, industry experts, market watchers and from market players who know targeted compa-

nies and markets.

- ◆ Product Development Intelligence, conducting analysis and providing advice in conceiving, developing and commercializing new products and processes in a wide range of industries, including chemical, consumer products, health care and more.

Guideline Inc. employs 234 full time and its market research operations employ 92 full time. Branch offices are in Boston, Washington, D.C., Minneapolis and Chicago.

38



DeCOTIIS

PHOENIX MARKETING INT'L

www.phoenixmi.com

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

Allen R. DeCotiis, 53, is chairman and CEO of PMI. He earned a Ph.D. in Administration and Statistics at Emory University.

U.S. revenue for 2005 was \$18.6 million, up 14.1% over 2005. The growth rate includes the 2004 and 2005 revenue of Cambridge Brand Analytics, acquired in June 2004, and Cultural Access Group acquired February 2005.

PMI is a marketing research firm that combines primary and syndicated research experience with database analytics and modeling to serve the financial services, consumer packaged goods, leisure and entertainment, automotive and travel industries. It has dedicated analytical groups in advertising and brand analytics, multicultural experience and direct marketing list optimization.

There are four business units:

- ◆ Advertising & Brand Analytics Group builds a predictive model that uses a single metric to evaluate ad and brand performance on an ongoing basis. Its Ad Performance Index (AdPi) and Brand Performance Index (BrandPi) compare the client

to the competition and vs. prior periods.

- ◆ Cultural Access Group provides strategic direction and research insight in reaching high-potential customers in emerging high-value market segments, including Hispanic, Asian-American, African-American, Multicultural Kids, and Gays & Lesbians.
- ◆ Automotive Group provides normative data to auto manufactures to guide their product and marketing strategy using conjoint analysis to measure the perceived values of specific product features, identify which features drive demand, and forecast likely acceptance of a vehicle or vehicle feature if it is brought to market. Data is compiled on optimal bundles, which appeal to consumers in various vehicle segment, demographic groups and brand preference categories for marketing direction.
- ◆ Travel, Leisure & Entertainment Group offers both syndicated and custom market research services. Its products include Electronic Gaming SCORES, a video game market research syndication; Hotel BASE (Brand Awareness & Share Estimate), which provides a nationally projectable measure of brand and advertising awareness, target market penetration and share-of-room nights; Hotel SCORES (Syndicated Consumer Online Research Evaluation Survey), which provides an annual overview of frequent guest programs; and customized case studies for airports, zoos, tourist attractions and resorts.

PMI has offices in New York, Florida, California, Michigan, Connecticut, Massachu-

setts, Delaware, New Jersey, Illinois, North Carolina and Maryland. It has a full-time staff of 64 employees.



The Pretesting Company Inc., in Tenaflly, N.J., was founded in 1983 and is a privately held corporation.

TPC’s president is Lee Weinblatt, 59. He has an M.S. in Clinical and Industrial Psychology from Temple University.

U.S. revenue for 2005 was \$17.5 million, down 11.6% from 2004. In ’05, 3.3% of total revenue, or \$564,000, was from outside the United States.

TPC has two divisions: MediaCheck Inc. (MCI) and Audience Survey Measurements Inc. (ASM), the latter providing single-source audience measurement for TV, radio and print.

TPC has 132 test sites in the United States

in its ASM division, all using its patented technologies, with an additional two locations in Europe, one in Canada and one in Israel. There are 28 full-time staff members with 300 other employees at the test sites paid on a per-hour basis. The MCI division has 18 full-time staff and 14 hourly employees.

The information TPC provides in its ASM copy and package testing systems includes

commercial zapping, ad wear-out, impulse purchase selection in a virtual supermarket/pharmacy, eye tracking and change in competitive imagery.

As of March ’05, TPC had installed 3,000 MCI TV monitors in homes in Omaha. In association with Emmis Communications (KM3TV) and local and national advertis-


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ers, commercial and program viewing habits of these homes are recorded on a second-by-second basis, and viewers can download additional information, coupons and sweepstakes, all provided by an exclusive code hidden in the broadcasts. The MCI division has 18 full-time staff and 14 hourly workers.

In '06, TCP is preparing for a 35,000-home national panel, including sales receipt scanners to augment TV and radio listening recording.

41



CAMA

KNOWLEDGE SYSTEMS & RESEARCH INC.

www.ksrinc.com

Knowledge Systems & Research Inc. (KS&R), based in Syracuse, N.Y., is a privately held company founded in 1983. Vincent Cama is chief executive officer and Rita L. Reicher is President of KS&R. Cama, 61, earned a Ph.D. in Sociology at Syracuse University. U.S. revenue in 2005 was \$16.1 million, up 10.3% over 2004. In 2005, \$3.7 million or 18.7% of total revenue was from outside the United States.

KS&R offers a portfolio of custom market research and consulting services. The firm is known for its staff credentials, broad and deep data collection capabilities, client assessment and service quality. KS&R specializes in global b-to-b research across a number of industry segments, including information technology, telecommunications, utilities, transportation, health care and financial services. It also has expertise in consumer markets, especially related to technology interface.

The firm features expertise and ability to communicate at a peer level with hard-to-reach research targets and senior executive respondents. It has completed thousands of C-level executive interactions through in-depth interviews, focus groups and surveys.

KS&R capabilities include: service and product concept and offering testing and development; value proposition differentiation and messaging; market size estimation and segmentation; brand and customer loyalty research and analysis; channel and partner strategy; pricing and buyer behavior.

Most KS&R principals have decade-long experience as both buyers and providers of research and consulting services. They continue to be involved as dedicated teams from project conception to completion. The firm's management style and 360-degree consultative approach ensure the highest level of customer service.

In 2005, KS&R expanded its investment in international resources and operations. The firm owns and operates a 110-seat contact center (KS&R's INSITE) and a unified, global, data collection network. KS&R employs 195 full-time market research and industry experts. In addition to its Syracuse headquarters, the firm has offices in New York City, Atlanta, Memphis, Tenn., and Frankfurt, Germany.

42



BUNN

RONIN CORP.

www.ronin.com

Ronin Corp. (RC) in Princeton, N.J., is a privately held company founded in 1986.

RC's president and CEO is Harry Bunn, 62. He has an economics degree from University of New South Wales, Sydney, Australia.

U.S. revenue for 2005 was \$15.5 million, up 11.5% from 2004. In '05, 2.5% of total revenue, or \$400,000, was from outside the United States.

RC is a global market research company that focuses its full-service b-to-b research capabilities in the technology sector—computers, software, services, telecommunications, and advanced electronics-related industries—and the healthcare industry. RC provides a full range of both qualitative and quantitative research services on a global level. Its projects range from the delivery of high-level strategic insight and recommendations to simple data collection by telephone or Web-based interviewing. Its capabilities include:

- ◆ A global data collection operation that conducts research in 70 countries in more than 20 languages from a central base in London. Focus groups are provided in its London center and includes a network of facilities and moderators in other countries.
- ◆ One-to-one marketing campaign development and implementation.
- ◆ Market research software, a set of telephone (CATI) and Web-based data collection software for the research industry.

In '05, RC expanded its IT decision-maker and physician panels globally, and expanded development of an advanced analytical capability.

RC has 60 full-time employees and 800 part time. It has offices in Princeton, N.J., and London.

43



RAO

MARKET PROBE INC.

www.marketprobe.com

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

MPI's founder and president is T.R. Rao, 65. He earned a Ph.D. in Marketing at Michigan State University.

U.S. revenue for 2005 was \$15.1 million, up 7.2% over 2004. In 2005, 42.8% of total revenue, or \$11.3 million, was from outside the United States.

MPI is a full-service global marketing research and consulting firm specializing in stakeholder measurement engagements as well as a wide array of custom research techniques. The firm strives to build long-term research partnerships with its clients, based on its team of professionals with research savvy and technical expertise.

MPI companies span North America, South America, Europe, Asia and Australia. Its U.S. operations are grouped into seven client service divisions: Agricultural, Auto & Manufacturing, Service, two Financial Services divisions, Pharmaceutical and Employee Satisfaction Research, which directs employee commitment research. These divisions provide full-service research as well as consult with MPI's international offices.

There are also three support divisions: Marketing Science, Data Acquisition Services and Information Technology.

The firm's services include customer satisfaction and loyalty research, employee equity research, brand management and tracking, new product development and custom research and consulting services. The Employee Satisfaction Research division focuses on employee engagement research, sales effectiveness and internal customer satisfaction.

Its consultative work provides customer satisfaction measurement that includes

interpreting results and determining strategic implications of customer feedback. MPI also provides statistical consultations and data mining. Special customer satisfaction research audit services are offered to new clients interested in testing MPI's models and techniques in their current CSM programs.

MPI's research portfolio focuses on customers (CSM, customer loyalty management solutions, benchmarking programs), employees (employee satisfaction metrics, employee commitment programs, HR applications and consultations) and brands

(brand health management, market segmentation, new product development), also with related research in product quality and distributor/dealer strategic relationships.

MPI contributes to research industry's knowledge base through publication of articles and books, including *Analysis of Customer Satisfaction Data* and *Linking Customer and Employee Satisfaction to the Bottom Line*. Its Rx models (Loyalty Rx, Brand Rx and Equity Rx) provide cost-effective means to set goals and take into account

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costs of improvements in different key areas. The firm's Web Reporter (WR) is a survey analysis tool that explores client data in near real time. Customized reports are created and exported to PowerPoint or Excel. WR creates many standard tabular, graphical and text-based reports that can use powerful sorting and filtering mechanisms. Text-based filters include exact and phonetic matches, allowing easy detection of patterns

within the data. It can be used with any data collection method and provides authentication features that limit user views of the data. In December 2005, MPI acquired Marketing Horizons Inc. (MHI), a St. Louis-based firm specializing in agricultural and crop sciences research. MHI, a division of MPI, now comprises MPI's Agricultural client service division. In late 2005, MPI acquired The Research Base FZ-LLC, a Dubai-based research firm. In early 2006,

MPI acquired Rowin Group, a firm specializing in pharmaceutical research, based in Maywood, N.J. MPI operates more than 300 in-house CATI stations among its four call centers in the United States, Canada, United Kingdom and Singapore. It maintains strong partnerships with field agencies throughout the world to expand the services they can provide. There are six company offices in the United States and subsidiary offices in Toronto, London, Paris, Singapore, Shanghai, Sidney and Dubai. Market Probe India has offices in Mumbai and Bangalore. The firm employs 155 full-time employees worldwide, including 77 in the United States, and as many as 1,000 part-time employees.

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PIETROWSKI

RDA GROUP INC.

www.rdagroup.com

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RDA Group Inc. (RDA), based in Bloomfield Hills, Mich., is a privately held corporation founded in 1969. Anthony Pietrowski is founder, president and CEO. U.S. revenue in 2005 was \$14.7 million, down 4.5% from 2004. In 2005, 16.5% of total revenue, or \$2.9 million, came from outside the United States. RDA is a full-service market research and consulting company providing information regarding customer behaviors and attitudes to businesses in a range of industries, including automotive, financial services, utilities, insurance, recreational vehicle, health care, temporary staffing, housing, food and advertising. Using quantitative and qualitative methods, RDA offers insight into product development, product quality, customer profiling and statistical modeling, as well as customer satisfaction and loyalty. RDA uses its Quality Management System (QMS) to conduct mail and telephone surveys, central location testing, Internet research, focus group research, one-on-one interviews and intercept research. Industry and research experience is complemented by database integration, data mining and advanced statistical analysis. The firm, with 92 full-time employees, addresses a variety of research needs, including:

- ◆ Customer Satisfaction—Designing tools for analyzing customer satisfaction to determine what drives satisfaction and loyalty.
- ◆ Product Quality—Leveraging positive product attributes, as well as identifying those aspects that hurt customer perceptions of quality.
- ◆ Advanced Product Research—Gathering and interpreting consumer opinion throughout the product development process, including the creation of customer profiles, product usage profiles, concept ideation, prototype evaluations and market-place launches.
- ◆ Qualitative Research—Using focus groups, one-on-ones and executive interviews, online groups and telepanels to uncover information important to marketing endeavors.
- ◆ Internet Research—Conducting online research among businesses and consumers, as well as Web site usability testing.
- ◆ Statistical Modeling and Consulting—RDA's statistical capabilities range from multivariate techniques to customized modeling and analysis.
- ◆ Six Sigma Consulting—Supporting and validating Six Sigma initiatives. RDA's Six Sigma Black Belts consult on the use of customer voice in, and the analysis of data from, Six Sigma projects in order to measure the impact of process improvement on revenue, profitability and growth.
- ◆ Global Research—Adapting research design, survey development, data collection, language and analytical insights to fit

the local culture and conditions in both the emerging and developed markets of North America, Europe, South America and Asia Pacific.

45



SAVITZ

SAVITZ RESEARCH COS.

www.savitzresearch.com

Savitz Research Cos. (SRC) in Dallas is a privately held corporation founded in 1981.

Jeffry N. Savitz is founder and president of SRC. He earned an M.S. and an MBA at The Wharton School of the University of Pennsylvania.

U.S. revenue in 2005 was \$14.4 million, up 2.9% from 2004.

SRC is a full-service marketing research company whose products cover all phases of marketing, from developing, positioning and marketing products through performance measurement. Its clients work with senior SRC executives with extensive client-

side experience.

The company offers models in customer satisfaction, benefit segmentation, brand equity, promotion evaluation, list screening, pricing and optimal line extension. It also provides qualitative and quantitative Hispanic research expertise.

The Savitz Field and Focus division offers a network of focus group facilities in seven major cities including, Los Angeles, Dallas, Houston, Chicago, Cleveland, Boston and New York. They facilitate in-depth interviews, taste tests, music tests, dial tests, usability tests, simulated store tests, product trial tests, ethnographic studies and mock juries.

SRC employs 50 full-time staff and offers a 100-line CATI-equipped system, complete Internet interviewing capabilities, along with data processing facilities. The firm also provides graphical and statistical services, SPSS and other software packages.

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RHEA

CHESKIN

www.cheskin.com

Cheskin, in Redwood Shores, Calif., is a privately held company founded in 1944. Darrel Rhea, 53, is CEO and principal of Cheskin. He earned a B.S. in Psychology and Graphic Design at the University of Redlands. U.S. revenue in 2005 was \$13.4 million, down 18.8% from 2004. In 2005, 14.1% of total revenue, or \$2.2 million, was from outside the United States. Cheskin conducts strategic research and consulting for clients with Fortune 1000 companies in food and beverages, consumer goods, financial services, pharmaceuticals, media and technology markets. The firm works with many of its clients throughout the development process, from concept inception through market launch. Cheskin

offers a full range of research methods, including quantitative, qualitative and ethnographic approaches. Its offerings are focused around evaluating market opportunities, developing and optimizing products and service and developing brand experiences. Cheskin has 59 full-time employees representing 20 different countries and cultures and speaking more than a dozen languages. Staff members include specialists on branding, design, packaging, trends, youth and intercultural markets. Cheskin incorporates design into the research process and has a fully functional design studio on staff. The company is based in Silicon Valley, with additional offices in San Francisco, New York, Seattle and Mexico City.

46



SERRINS

MARKETING ANALYSTS INC.

www.marketinganalysts.com

Marketing Analysts Inc. (MAI), based in Charleston, S.C., is a privately held company founded in 1982. Robert Pascale, 51, is founder and chairman of MAI and Richard Serrins, 56, is president and CEO. Pascale earned a Ph.D. in Applied Research and Statistics at Hofstra University, and Serrins earned a B.A. at Hofstra University. U.S. revenue for 2005 was \$13.4 million, down 11.8% from 2004. In 2005, 5.6% of total revenue, or \$800,000, was from outside the United States. MAI is a full-service custom marketing research and consulting company with 36 full-time employees that focus on four areas:

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

Client engagements include both custom and strategic marketing research services. Among its product and purchasing offerings are choice modeling, concept and product testing, shelf packaging research, product lines research (LineOpt) and volumetric modeling (VMS), and category development. MAI's consumer and customer research includes segmentation, target panels and tracking studies. Its communications activity consists of advertising copy research, brand personality and image identity (Brand Intelligence), and positioning studies. The company has an office in Charlotte, N.C., in addition to its Charleston headquarters and Morris Plains, N.J., office.

48



McINTURFF

PUBLIC OPINION STRATEGIES

www.pos.org

Public Opinion Strategies (POS), based in Alexandria, Va., is a partnership founded in 1991. POS is headed by partner and co-founder Bill McInturff, 53, who earned a B.S. at Boston University. U.S. revenue for 2005 was \$13.1 million, down 38.2% from 2004. In '05, 0.1% of total revenue, or \$0.1 million, was from outside the United States. POS is a national political and public affairs research firm that has conducted more than 2 million interviews with voters

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

About half of POS’s research is dedicated to winning elections for candidates from City Council to the presidential level, and for initiatives. The American Association of Political Consultants awarded the firm “Pollster of the Year” for 2002.

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, health care, technology, hospitality, insurance, real estate, retailers, sports and stadiums, telecommunications, tourism, transportation and utilities.

A wide array of research techniques are used:

- ◆ Quantitative research: POS’s 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 research: 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 tag line development.

POS has offices in Hermosa Beach, Calif., and Denver, with a staff of 32 full-time employees.

49



PINNELL

MARKETVISION RESEARCH INC.

www.marketvisionresearch.com

MarketVision Research Inc. (MVR), based in Cincinnati, is a private company founded in 1982.

Donald G. McMullen is the chairman of MVR, and Jon Pinnell is its president. Pinnell earned an MBA at the University of Texas at Austin.

U.S. revenue for 2005 was \$13.0 million, up 10.2% over 2004.

MVR is a full-service, custom marketing research company, with a focus on product-based research, including product development, pricing, branding and segmentation in both the consumer and business sectors. The company invests significantly in its research-on-research program, particularly in the area of advanced quantitative research design and analysis. MVR works across industry groups.

Its capabilities include:

- ◆ Advanced Analytical—MVR’s Marketing Sciences group blends technical skills with creative approaches to deliver insights into client’s businesses. It is especially skilled in discrete choice and conjoint techniques.
- ◆ Viewpoint Forum—The firm’s Internet panel and research platform has a 60% cooperation rate among its national consumer panelists. The platform is used for many types of research, including concept tests, home-use tests and discrete choice work.
- ◆ MarketVision/Gateway-MVR’s in-per-

son interviewing facility is located at the Universal Studios theme parks in Orlando, Fla., and Hollywood, Calif. These facilities provide a national sample to conduct taste tests and other product-based research. All interviewing stations have high-speed Internet access and the facility is noted for recruiting families, children, teens and Hispanics.

MVR employs 60 full time and has three offices: its main office and qualitative research facilities are in Cincinnati; client service offices are in Dallas, Cleveland and

New York; and a research call center is in West Chester, Ohio. Data collection offices are in Orlando, Fla., and Los Angeles.

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MARKETING NEWS’
HOT TOPICS

GIVES YOU A COMPREHENSIVE LOOK
AT TOP MARKETING ISSUES

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ROTHSTEIN

RTi-DFD

www.rti-dfd.com

RTi-DFD, in Stamford, Conn., is a privately held company founded in 1979.

Mel Rothstein, 63, is chairman and chief executive officer of RTi-DFD. He has a B.A. from Hunter College, City University of New York.

U.S. revenue for 2005 was \$12.7 million, up 10.4% from 2004.

RTi-DFD is a custom market research company providing services to a broad and diverse client base. Their research tools

- are designed to focus on strategic marketing direction across brand strategy, market structure and opportunity, innovation and customer measurement.
- Among its services are:
- ◆ BrandStar—A facilitated, interactive strategic marketing tool used to define all aspects of a brand’s competitive position for better strategic and research decisions.
 - ◆ Landscape Segmentation—A quantitative technique to define key market segments, opportunities and sensory positions. It is easily illustrated and flexible to accommodate what-if questions during a presentation or meeting.
 - ◆ Qualmark—A satisfaction and loyalty research program designed to help prioritize improvement efforts by focusing on the aspects of service that have the largest impact on overall satisfaction.
 - ◆ Construction Test—A prod-

- uct development tool used to identify optimal combinations of product or service components.
- ◆ ScreenPlay—After a quantitative screening of ideas, concepts or benefits, ScreenPlay provides a way to consider these multiple opportunities and determine which make up the optimal set.
 - ◆ Pathways—Using wireless audience response technology, quantitative and qualitative research can be combined in a single two-hour session. It also provides cost, speed and learning benefits to a client’s team.
 - ◆ Mature Market Omnibus—A regularly scheduled Omnibus study among 1,000 50- to 74-year-olds. This demographic can be reached and queried quickly and cost-effectively.
- RTi-DFD presents findings and identifies and evaluates indicated actions for building consensus toward business decisions.
- The firm has offices in Stamford, Conn., Jersey City, N.J., and Columbus, Ohio, and employs 41 full time. ■

WORLD ● Bird flu, notwithstanding

KFC spreads Wings to Vietnam’s Hanoi

KFC is set to become the first U.S. fast food chain to open a restaurant in Vietnam’s communist capital of Hanoi next month, a company official said in late May.

The restaurant is scheduled to open by the end of June and other outlets may follow by year’s end, depending on the response, says Le Van Dut, marketing manager of KFC Vietnam.

“Despite the differences in the eating habits of people in Hanoi, we are confident about our prospects there,” he says.

KFC entered Vietnam’s southern economic hub Ho Chi Minh City in 1997 and now operates 21 restaurants there, Dut says. Hanoi a city of about 3.5 million people has domestically owned chain restaurants and coffee shops, but KFC will become the first U.S. fast food brand to enter

the market.

The announcement comes as Vietnam continues to battle the H5N1 bird flu virus. The country remains the hardest hit in the world, but mass poultry vaccinations coupled with strong political rallying will have slowed the spread of the virus. Vietnam has not reported any outbreaks in poultry since December and no human cases since November.

Dut says bird flu is not expected to affect KFC’s business.

“We have a stable and safe source for chickens and are ready to cope with bird flu,” he says. “We have overcome the situation for the past few years.”

Louisville, Ky.-based Yum! Brands Inc., is the parent of fast food chains KFC, Taco Bell and Pizza Hut. ■

—The Associated Press

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NATION ● *A little nip, tuck*

Yahoo! redesigns home page to up ad appeal

Yahoo! Inc.'s Web site unveiled a new look in late May as the Internet powerhouse strives to remain the world's most popular online destination and strengthen its advertising appeal.

The overhaul marks the first face lift to Yahoo!'s home page since September 2004.

The redesigned page includes more interactive features that reduce the need to click through to other pages to review the weather, check e-mail, listen to music or monitor local traffic conditions.

Another addition, called "Yahoo! Pulse," offers recommendations and insights about cultural trends culled from the Web site's 402 million users worldwide.

Yahoo! is making the upgrade as it battles for traffic with longtime rivals MSN, AOL and Google Inc. while also trying to fend off an intensifying threat posed by the rise of social networking sites such as MySpace.com.

"Our goal is to have the best page on the Internet," says Dan Rosensweig, Yahoo!'s chief operating officer. "We feel like this (redesign) does something great for everybody."

Sunnyvale, Calif.-based Yahoo! regards the latest changes as the most dramatic renovations made to its front page since the site's 1994 debut as a bare-bones directory developed by Stanford University students Jerry

Yang and David Filo.

The new look is long overdue, says Jupiter Research analyst David Card. "The site was getting pretty long in the tooth and looking pretty old fashioned," he says. "Now, it looks clean, crisp and modern."

Even so, Card believes Yahoo!'s upgrades won't impress younger, cutting-edge Web surfers who are spending an increasing amount of time hanging out at MySpace.com. "They didn't really push the envelope very hard."

The most notable changes will allow Yahoo! users to pull down interactive menus giving them snapshots of weather, traffic and movie information as well as providing instant access to the site's popular e-mail, instant messaging and music services.

Like other widely visited Web sites, Yahoo! must balance its desire to keep pace with the Internet's constantly shifting trends with the recognition that changing things too dramatically might alienate a large number of users comfortable with the status quo.

Yahoo! settled on the final redesign, code-named "Spirit," after months of testing with selected users. As another precaution, the new look won't show up as the default page of Yahoo.com for several more months.

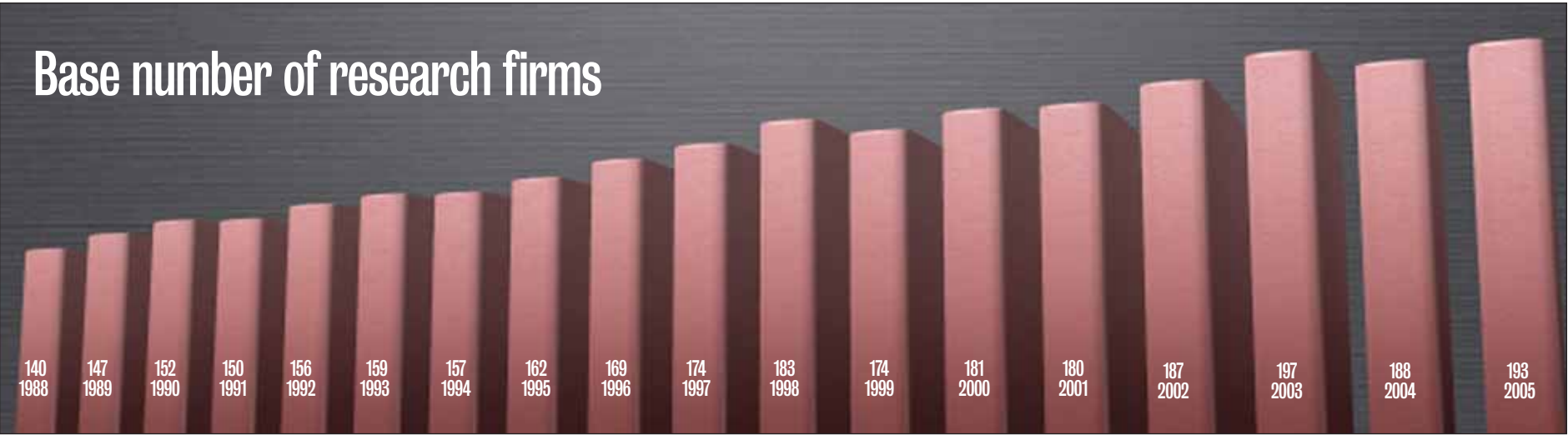
"Any time you touch the most visited page on the Internet, it's going to feel like a big

change, and we think this is a really big change," Rosensweig says.

Microsoft Corp.'s MSN and Time Warner Inc.'s AOL, the two most visited Web sites after Yahoo!, also have tweaked their looks during the past year.

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HONOMICHL / From page H3

Marketing research industry now more global than ever

1.9% after adjustment for inflation. (These same 50 organizations, including their parent companies, showed revenue of \$14.4 billion. So, 55.6% of that was from outside the United States, another indication of how international this industry has become.)

It should be noted, in the case of the Top 50, every effort has been made to screen out the revenue these organizations had from nonresearch activities. Some have quite a bit, and that is explained in the company profiles. The second body of data comes from

the Council of American Survey Research Organizations (CASRO), a trade association based in Port Jefferson, N.Y., that provides on a confidential basis revenue for 143 member firms too small to make the Top 50 list. That figure for 2005 was \$723 million, up 7.5% over

2004, or 4.1% after adjustment for inflation. Almost all that revenue was from operations within the United States, although the exact percent is not known. These CASRO all-other firms had, on average, revenue of \$5.1 million in 2005.

Pre-employee revenue adds some insight to profiles

Add the two together and revenue for the 193 firms included in this analysis totals \$7.5 billion, which is 5.5% higher than 2004, or 2.1% after adjustment for inflation. That 2.1% figure, then, is the best fix we have for the industry’s growth rate within the United States in 2005. That may well be a conservative estimate, because there is no way to account for the industry’s increase in productivity from outsourcing or shifts from one data collection method to another. In a word, the clients could well be paying less but getting as much, or more, work done for each dollar spent.

Changes in listings

There are changes in the Top 50 listing from 2004 to 2005. One of the largest was NOP World, which ranked No. 8 on the 2004 list, but has since been absorbed, via acquisition, by Germany’s GfK AG. There are three new firms on the list for 2005: Experian Research Services in Deerfield Beach, Fla., MarketCast in Los Angeles, and Knowledge Systems & Research in Syracuse, N.Y. Three firms dropped off due to revenue levels: Data Recognition Corp., Q Research Solutions Inc. and The Marketing Workshop Inc. Another change is in name only: What was Marketing Research Services Inc. in 2004 now shows up as MVL Group in Jupiter, Fla.

Revenue per employee

This year, each of the Top 50 organizations was asked to provide the number of full-time (presumably salaried) employees they had, on average, during 2005. This makes possible a revelation of how they differ in terms of annual revenue per salaried employee, and as you’ll see, there are great discrepancies in this. First, some norms: For the Top 50 organizations alone, the answer was \$216,400. For the CASRO all-other 143, it was estimated at \$220,100. Just within the Top 50 group, U.S.-only, the lowest-ranked firm in this regard was Knowledge Systems & Research Inc. with \$82,600, which included its full-time salaried interviewers. The highest was MarketCast, with \$755,600. There are many reasons these revenue-per-salaried employee comparisons are, or could be, misleading. One is the nature of the firm’s work—syndicated, multi-client services, custom ad hoc projects, mainly. Another is the amount of work, such as data processing, data collection and such, that is subcontracted out. Another is the amount of analytical input associated with the firm’s final product. The larger database companies with syndicated services tend to be higher than average: IMS Health Inc. at \$373,200; Information Resources Inc., \$256,300; and Arbitron

Inc., \$323,900. An exception to this is VNU with only \$166,300. ACNielsen is known to outsource much of its data processing and data collection work. Yet, a few of the basically smaller survey firms had extraordinary revenue per employee, for example, Maritz Research, \$323,900; The PreTesting Co.,

\$380,500; and Savitz Research Cos., \$480,000. **Company profiles** There are here exhaustive profiles of each of this year’s Top 50 research organizations, which show among other things ownership, a brief profile of each top exec-

utive, acquisitions and divestitures made during 2004 and 2005, a library of services provided, and plans for the future. You are urged to read these carefully; together they provide an understanding of the U.S. marketing research industry that is unique to this annual analysis, now in its 33rd year. ■

put the couch potatoes on the couch

Respondents are more relaxed here. Why? Maybe it's the loft living room environment with couches, cubes, and windows that let in natural light. Maybe it's that their fellow respondents are screened for articulateness and creativity. Either way, it's a focus group experience that sits well with everyone.

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INDUSTRY / From page H3

Research capabilities grow with M&A activities

in research has been driven primarily by clients' merger and acquisition activity, and by the globalization of their clients. Both (trends) require (research) companies that can serve those clients on a

global basis," says Laurence N. Gold, editor of *Inside Research*, based in Barrington, Ill.

Gold feels that the M&A activity among research firms reached its peak in 2005, when activity was double that of 2004. "Just like big corporations, research companies have been trying to become more efficient and reduce costs," Gold says, adding that activity has slowed significantly in 2006, the exception being the acquisition of the Netherlands-based VNU by private equity investors, a deal valued at \$9.8 billion.

The M&A activity has provided market research companies with a broader spectrum of capabilities, including the much-desired capability to execute the global research projects their larger clients now demand. Because more projects can be completed in-house by research companies, the companies increase their own business while reducing costs. Clients can negotiate for better prices because of their own consolidation activities and resulting clout.

"When you look at the (acquisition activity of) Kraft and Procter & Gamble,

Purchasing behavior shifts with more global perspective

they still are the highest volume users of research but how they use it is becoming a little more strategic. They are more centralized (and the) silo mentality is dropping away,” says Larry Brownell, executive director of the Marketing Research Association, based in Glastonbury, Conn.

That centralization means that requests for proposals for research projects that formerly were managed by the end-users have given way in the quest for operational efficiency. Now project proposals, like those in many other industries, are routed through a purchasing department or purchasing manager. As a result, rather than the research supplier’s sales team building relationships directly with the client’s marketing executives—the users of the research within a company—the proposals instead go through an agent who is responsible for knowing the research needs of the entire company.

By having command over global purchasing, agents are able to negotiate

deals for the organization as a whole, rather than by country or office.

The purchasing agent model is growing in popularity. Gold estimates that while about 50% of research now sold in the United States involves a purchasing department or officer, in the next five years the amount will reach 90%. “Research companies have had to adapt their way of offering services in terms of price and characteristics of their services to meet the lower cost demands of the client,” Gold says.

Larry Levin, executive vice president at Synovate, the 10th-largest research company in the United States, echoes the sentiment. “Companies are now able to get global discounting even if they are doing a regional study, by taking advantage of relationships,” he says. “Over the last two or three years, the effect of procurement has been really plentiful in research. It’s (created) a whole new measure in how we position ourselves.”

The London-based research company is itself a conglomerate of smaller divi-

sions operating in 46 countries. Synovate has actively acquired local research firms in the last several years, including 10 in 2005.

Levin says the shift in purchasing behavior has prompted Synovate to

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INDUSTRY / From page H65

Changes in client needs mark evaluation of MR

adjust its approach to submitting bids, and to adjust how the company uses its internal resources. “We look to where we can go (within Synovate) to maximize efficiencies. If we have the ability to collect data in China, we will insist the work go through Synovate China (and) not one of our competitors. We are doing more of our own internal selling,” he says.

The research being commissioned today in the United States also reflects

business’ desire for international or multicultural perspectives, making the international capabilities of research companies important.

“The globalization of companies that we never would have thought would go global has changed the nature of their need for research,” says Brownell, with MRA. “They are trying to get at larger world trends Companies that are buying research are a different breed now.” ■

YAHOO! / From page H61

Although Google still provides a page featuring little else than its Internet-leading search engine, it also offers an option that enables users to customize the home page to suit their personal tastes.

Yahoo! remains the Web’s most viewed site, serving up 31.2 billion pages in April, but some analysts believe MySpace’s rapid growth foreshadows a changing of the guard. “The bar keeps getting raised,” says Gartner Inc. analyst Mike McGuire. “I think you are going to see constant tweaking because of sites like MySpace.”

Remaining the most trafficked and viewed

Web site is important to Yahoo! because those measures are critical to the advertisers that provide the company with most of its profits.

As it is, Yahoo!’s earnings haven’t been growing rapidly as Google’s—a factor that has weighed on Yahoo!’s stock price, which has dropped by 21% so far this year. Meanwhile, Google’s stock price has declined by 10.5%.

Yahoo!’s shares fell 6 cents to close at \$30.97 on the Nasdaq Stock Market, where Google’s shares fell \$4.90, or 1.3%, to finish at \$371.30. ■

—Michael Liedtke for The Associated Press

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NATION ● Possible air pollution

Honolulu court backs aerial advertising ban

A federal appeals court in late May upheld Honolulu’s ban on aerial advertising, rejecting an anti-abortion group’s argument that its free-speech rights were violated when it was prohibited from flying banners of aborted fetuses over crowded Waikiki beaches.

The unanimous ruling by a three-judge panel of the 9th U.S. Circuit Court of Appeals says the city’s ordinance does not violate the First Amendment and is a “reasonable and viewpoint-neutral restriction on speech in a nonpublic forum.” The group has other means of conveying its message, the judges say.

“Preservation of the visual beauty of Honolulu’s coastal and scenic areas is of paramount importance,” the court says.

The Center for Bio-Ethical Reform says it expected to lose in the “liberal” lower courts and will appeal the decision to the Supreme Court.

Gregg Cunningham, director of the Orange County, Calif.-based group, says the First Amendment has taken “a grievous blow.”

“If the environmental groups and political leftists who are trying to suppress the truth about abortion think we’re going to go away because we lost two cases that we fully expected to lose, they’re in for a rude awakening,” he says.

The decision affirmed an earlier ruling by the U.S. District Court and could open the way for other cities to join Honolulu in prohibiting banners towed by aircraft.

Hawaii has no billboards or other promi-

nent outdoor advertising, and murals of whales and the ocean adorn the sides of buildings. The city banned aerial advertising in 1978.

Mayor Mufi Hannemann and environmentalists applauded the decision, saying it will help preserve Hawaii’s natural beauty and tourist industry.

Mary Steiner, head of The Outdoor Circle, which has been a supporter of the city’s case, says Hawaii’s environment and scenery are special and need to be protected.

“To blight it with signs being pulled overhead in the sky really does detract from the number one industry we’re trying to sell,” she says.

Cunningham says it is “perverted” to care more about the scenery than “children being tortured to death.”

The court’s opinion written by Judge M. Margaret McKeown says banner towing is “neither a common means of speaking nor a distinct and traditionally important form of expression.”

Contrary to the court’s opinion, the group does not have alternative methods to advertise because it has been “shut out” by mainstream media, which often publishes graphic images from wars and natural disasters, Cunningham says.

The group wants to fly banners in Hawaii to reach an international audience, as it does in other tourist-populated areas like Florida. ■

—Jaymes Song for *The Associated Press*

