

2011 HONOMICHL
GLOBAL TOP 25
RESEARCH REPORT

BY JACK HONOMICHL



RENEWED REVENUE GROWTH FOR GLOBAL RESEARCH INDUSTRY

The 25 largest market research conglomerates, with their international wingspan, account for about 63% of spending the world over for marketing, advertising and public opinion research services through for-profit organizations, so their financial health is of special importance. They are the industry's backbone.

In 2010, the Global Top 25 research firms, in toto, had revenues of \$18.8 billion, up 4.9% from 2009. That is a very healthy turnaround, since last year's Global Top 25 saw revenues down 3.1%, the first downer since I started this annual compilation 16 years ago. Payroll has followed suit: This year's Global Top 25 have 107,803 full-time employees, up 4.4% from the year before. And judging from the first-quarter results for those top firms that are public, this revenue growth trend appears to be continuing in 2011.

A Couple of Caveats

However, keep in mind the old advertising adage that says, "What the headline gives away, the fine print takes back." There are known inflation rates for the United States, Japan and the 15 EU countries in Western Europe, and that block accounts for about 77% of the world's research spend. A weighted average of those countries produces an average inflation rate of 1.7% for 2010 and we can assume that pretty well represents the rest of the world, too.

While the global research industry's 2010 revenue growth was healthy—and most welcome—it was not enough to recover the downside of 2009.

So the Global Top 25 firms' revenue growth rate of 4.9% slims down to 3.2% in "real growth." (That's still a step in the right direction year over year, of course, because the Top 25 firms' real growth in 2009 was -4.5%.)

Further, seven of this year's Global Top 25 firms' revenues decreased from 2009 to 2010 or did not grow enough to cover inflation. Of these seven, six are based in the U.S. Put another way, 15 of this year's Global Top 25 firms are U.S.-based; the other 10 call Japan, Germany, France, Brazil or the U.K. home. Only one of these non-U.S. firms did not grow revenues enough to cover inflation, so the non-U.S.-owned or -managed firms fared much better than U.S.-owned or -managed firms. Make of that what you will.

So while the global research industry's 2010 revenue growth was healthy—and most welcome—it was not enough to recover the downside of 2009. And, relatively, firms owned or managed in the U.S. were laggards.

The Behemoths

If you focus on just those five conglomerates that have revenues of \$1 billion or more—and they alone account for 72% of the Top 25 firms' revenue total—only one, IMS Health, did not grow revenues enough to cover inflation, which means that it's the smaller firms that saw revenues decline, generally.

Beyond sheer size, what do the billion-dollar behemoths have in common?

1. INTERNATIONALISM. The top five firms get from 52% to 91% of their revenue from operations based outside of their home countries, and have networks of subsidiaries and branch offices in 65 to 100 foreign countries. And a significant part of this international sprawl came from previous acquisitions. Specifically, from 2002 to 2010, GfK acquired 46 research companies around the world, Nielsen acquired 19, Ipsos 37 and Kantar/TNS 65. This acquired revenue presents a problem when it comes to calculating growth; if ignored, it artificially hypes rates. So for this analysis, growth rates have been corrected by either including acquired revenue in the firms' annual revenues for 2009 and 2010 or excluding it from both years. The same procedure was used for all Top 25 firms.

2. SYNDICATED SERVICES. The top five firms offer a variety of services, which are described in the individual company profiles that follow—well worth reading. This spells diversification. But you'll note that the bulk of their revenue comes from syndicated services derived from huge databases and most of this revenue is under contract, often for several years out. That spells stability: When there are economic downturns, these giants are better able to weather the storm.

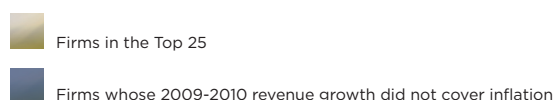
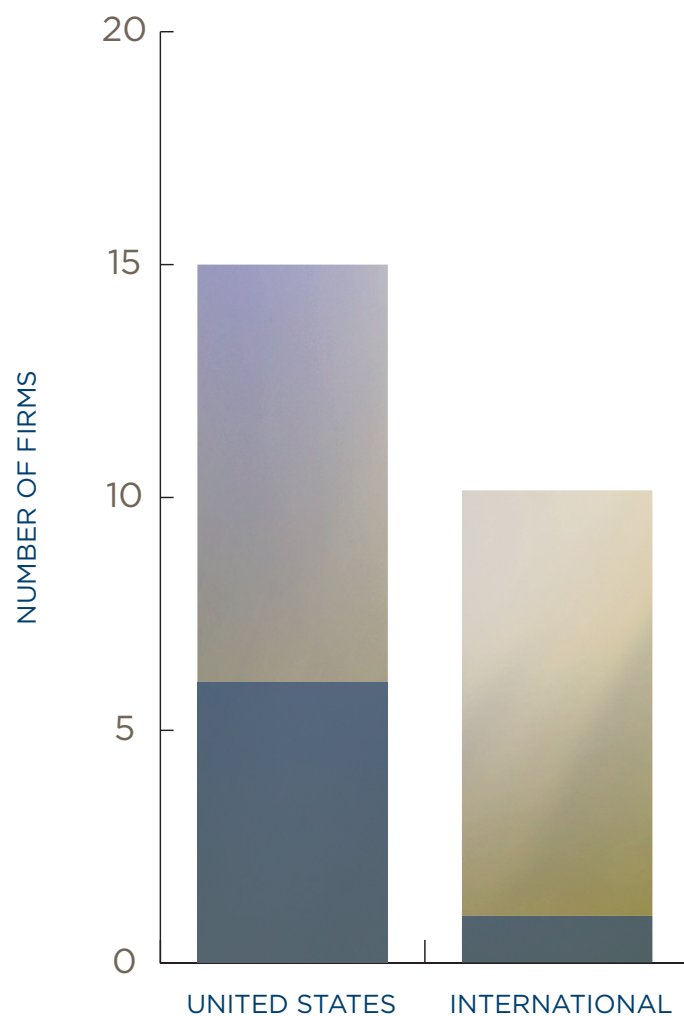
3. PUBLIC OWNERSHIP. All but one of the top five firms are either publicly listed on major stock exchanges or subsidiaries of public companies that are. That means that their financial performance (including profits) is in the public domain. The one privately held firm, IMS Health, was public until February 2010 when it was acquired by private investors, including the Canada Pension Plan Investment Board. This means that IMS's financials had to be estimated for this report.

As for the other 20 firms in this list, some are also public but most are private, and their revenue had to be revealed for this report and subjected to third-party verification. Also, all firms reported on research-only revenue, as much as possible. Several have considerable revenue from nonresearch activities and this detail can be found in the individual company profiles that follow.

4. NONRESEARCH MANAGEMENT. Of the top five firms, only one, Ipsos, is headed by top management that has a marketing research background and grew the company on their own. The rest are headed by general managers with nonresearch backgrounds who have been recruited from the "outside." And what does it cost to attract and retain such management skill? Well, in the case of Nielsen, its chairman and CEO, David Calhoun, who previously was in industrial

Almost all of the 20 smaller firms still are headed by people who grew up in the research industry.

GROWTH BEYOND INFLATION



manufacturing at General Electric Co., had a base salary of \$1.6 million in 2010, but with bonus and stock, his total remuneration was \$13 million. 2010 data on the past chairman and CEO of IMS Health, David Carlucci, listed his total remuneration as \$1.9 million in 2009. GfK Chairman and CEO Klaus Wübbenhorst took home \$2 million in 2010. Data for the top man at Kantar, Eric Salama, was not made public.

In sharp contrast, almost all of the 20 smaller firms still are headed by people who grew up in the research industry. But that is changing: As founders drop out, it is common to bring in an “outsider” to replace them.

New to the List

There was but one change to the Top 25 list in 2010: ICF International, based in Fairfax, Va., came on and a British firm, dunnhumby Ltd. in London, dropped off. ICF offers survey research services to multinational corporations and the U.S. government, and dunnhumby, which is mostly owned by Tesco, the largest supermarket chain in the U.K., and is a provider of in-store measures of merchandizing activity, decided that it was more of a marketing company than a research company and therefore did not participate.

But change is a constant and next year’s lineup is apt to be different yet. For example, London-based Aegis Group plc agreed at the end of July 2011 to sell Synovate, No. 6 in the rankings, to Ipsos SA, No. 5, and No. 7-ranked SymphonyIRI Group was acquired in July 2011 by New York-based private equity firm New Mountain Capital.

Methodology

Since results from this annual analysis are often quoted in the press, it is especially important that the reader know exactly how these data are derived, and so this explanation: Invitations to market research firms with estimated annual global revenue of more than \$50 million are sent in April of each year requesting revenue information for the prior year, a company profile of activities and other company metrics. Global Top 25 rankings are based on home country revenue converted to U.S. dollars using average year exchange rates provided by the U.S. Federal Reserve Bank. Growth rates from the prior year to the current year for each firm are based on home country organic percent revenue change, which excludes year-to-year currency exchange effects and acquisition or divestiture effects. Total company revenues are stated in the company profiles when provided. Verification of revenue is required of each private firm for ranking by a third party, generally its outside accounting firm, for ranking. For further information, contact Larry Gold at 847-525-0707 or Jack Honomichl at 847-382-3246. **m**

Top 25's Total Worldwide Revenues

Year	Top 25 Firms' Revenue Total, in millions
2010	\$18,759.9
2009	\$17,424.5
2008	\$18,860.9
2007	\$17,525.4
2006	\$15,522.8
2005	\$14,399.7



Jack Honomichl is founder of the *Inside Research* industry newsletter, a market research trade publication based in Barrington, Ill.



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TOP 25 GLOBAL MARKET RESEARCH ORGANIZATIONS

U.S. Rank 2010 2009		Organization	Headquarters	Parent Country	Website	No. of Countries with Subsidiaries/ Branch Offices ¹	Research- only Full-time Employees ⁴	Global Research Revenues ² (US\$ Millions)	Percent Change from 2009 ³	Revenues From Outside Parent Country (US\$ Millions)	Percent of Global Revenues From Outside Home Country
1	1	The Nielsen Co.	New York	U.S.	Nielsen.com	100	32,900	\$4,958.0	6.5%	\$2,551.0	51.5%
2	2	Kantar*	London & Fairfield, Conn.	U.K.	Kantar.com	80	21,800	3,183.6	3.9	2,387.7	75.0
3	3	IMS Health Inc.*	Norwalk, Conn.	U.S.	IMSHealth.com	74	7,000	2,211.6	0.3	1,410.5	63.8
4	4	GfK SE	Nuremberg	Germany	GfK.com	65	10,546	1,716.2	7.3	1,265.4	73.7
5	5	Ipsos SA	Paris	France	Ipsos.com	67	9,498	1,512.8	8.3	1,383.0	91.4
6	6	Synovate	London	U.K.	Synovate.com	64	5,902	884.8	5.9	776.3	87.7
7	7	SymphonyIRI Group	Chicago	U.S.	SymphonyIRI.com	8	3,600	727.0	4.6	270.0	37.1
8	8	Westat Inc.	Rockville, Md.	U.S.	Westat.com	1	1,964	455.3	-9.4	--	--
9	10	INTAGE Inc.**	Tokyo	Japan	Intage.co.jp	3	1,997	416.2	4.7	12.7	3.1
10	9	Arbitron Inc.	Columbia, Md.	U.S.	Arbitron.com	2	1,113	395.4	2.6	5.0	1.3
11	12	The NPD Group Inc.	Port Washington, N.Y.	U.S.	NPD.com	14	1,135	240.1	5.5	66.4	27.7
12	11	J.D. Power and Associates*	Westlake Village, Calif.	U.S.	JDPower.com	10	730	231.4	-5.4	84.1	36.3
13	14	Video Research Ltd.**	Tokyo	Japan	VideoR.co.jp	3	393	212.0	-1.2	--	--
14	17	IBOPE Group	Sao Paulo	Brazil	IBOPE.com.br	15	2,259	210.8	25.8	38.8	18.4
15	-	ICF International Inc.	Fairfax, Va.	U.S.	ICFI.com	7	1,107	200.1	9.5	46.9	23.4
16	18	comScore Inc.	Reston, Va.	U.S.	comScore.com	18	922	175.0	15.0	32.7	18.7
17	15	Harris Interactive Inc.	New York	U.S.	HarrisInteractive.com	7	853	166.8	-0.6	72.9	43.7
18	16	Maritz Research	Fenton, Mo.	U.S.	MaritzResearch.com	5	743	162.1	4.8	21.2	13.1
19	20	Abt SRBI Inc.	Cambridge, Mass.	U.S.	AbtAssociates.com	37	819	129.4	17.9	42.6	32.9
20	25	Macromill Inc.	Tokyo	Japan	Macromill.com	2	553	115.0	16.2	--	--
21	22	Lieberman Research Worldwide	Los Angeles	U.S.	LRWonline.com	3	368	100.8	14.5	18.5	18.4
22	19	ORC International	Princeton, N.J.	U.S.	ORCInternational.com	6	444	98.0	-1.9	34.1	34.8
23	21	Mediametrie	Paris	France	Mediametrie.com	1	547	92.3	9.4	8.5	9.2
24	23	Cello Research & Consulting	London	U.K.	CelloGroup.co.uk	2	353	84.5	4.8	37.2	44.0
25	24	Market Strategies International	Livonia, Mich.	U.S.	MarketStrategies.com	3	257	80.7	1.7	13.1	16.2
		Total					107,803	\$18,759.9	4.9%	\$10,578.6	56.4%

* Estimated by Top 25 authors. ** For fiscal year ending March 2011.

1 Includes countries that have subsidiaries with an equity interest or branch offices, or both.

2 Total revenues that include nonresearch activities for some companies are significantly higher. This information is given in the individual company profiles.

3 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. Rate of growth is based on home country currency and excludes currency exchange effects.

4 Includes some nonresearch employees.



1

THE NIELSEN CO.
 Nielsen.com

NAME **David L. Calhoun, 54**
 TITLE **Chairman and CEO**
 EDUCATION **B.S., accounting,**
Virginia Polytechnic Institute

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

Research-only revenue in 2010 was \$4,958.0 million, up 6.5% from 2009. In 2010, 51.5% of total research-only revenue, or \$2,551.0 million, was from outside the United States. The growth rate includes 2009 and 2010 revenue from the acquisition of The Cambridge Group Inc. in the United States in May 2009, and excludes revenue from the acquisitions of GlanceGuide Inc. in the United States in May 2010 and of USP Marketing Intelligence GmbH in Germany in April 2010, and the sale of ORG-GfK Marketing Services in India in July 2009 and of Nielsen EDI in December 2010.

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

Nielsen is a global information and measurement firm offering services in marketing and consumer information, TV and other media measurement, online intelligence, mobile measurement and trade shows. With an extensive and long-standing foundation of consumer measurement, the firm delivers media and marketing information, analytics and industry experience about what consumers watch (consumers' interaction with media) and what consumers buy on a global and local basis.

Consumer Watch

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

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

Nielsen provides two principal TV ratings services in the United States: measurement of national TV audiences and measurement of local TV audiences in all 210 designated local TV markets. The firm also

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

- **Online Audience Measurement Services:** Nielsen is a global provider of Internet media and market research, audience analytics and social media measurement of the behavior of online audiences for online publishers, Internet and media companies, marketers and retailers. The firm measures Internet surfing, online buying and video viewing (including TV content) of online audiences, providing advertising metrics such as audience demographics, page and ad views, and time spent, quantifying the effectiveness of advertising by reporting online behavioral observations, attitudinal changes and actual offline purchase activity. Nielsen measures and analyzes consumer-generated media including opinions, advice, peer-to-peer discussions and shared personal experiences on more than 100 million blogs, social networks, user groups and chat boards.

- **Mobile Measurement Services:** The firm provides consumer research and independent measurement for telecom and media companies in the mobile telecommunications industry, including mobile carriers and device manufacturers. In the United States, its metrics are a leading indicator for market share, customer satisfaction, device share, service quality, revenue share, content audience and other key performance indicators. Nielsen also benchmarks the end-to-end consumer experience to pinpoint problem areas in the service delivery chain, track key performance metrics for mobile devices and identify key market opportunities (e.g., demand tracking for device features and services). While mobile Internet consumption is still nascent, it is expanding quickly to capture the Internet, video and other media on mobile devices worldwide.

- **Three-Screen Media Measurement:** The firm continues to develop advanced measurement techniques of the three principal screens: TV, online and mobile devices. In the United States, Nielsen is using a single-source TV and PC panel to deliver cross-screen insights. Its cross-screen measurement service provides information about the simultaneous use of more than one screen, as well as unduplicated reach, cause and effect analysis, and program viewing behavior. It also provides advertising effectiveness research across multiple platforms.

Consumer Buy

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

- **Information: Retail Measurement Services:** Nielsen's purchasing data provides market share, competitive sales volumes, and insights into activities such as distribution, pricing, merchandising and promotion.

Combining this information with in-house consultative services, it produces insights to improve marketing and sales decisions.

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

- **Information: Consumer Panel Measurement:** This information offers insight into shopper behavior such as trial and repeat purchase for new products and likely substitutes, as well as customer segmentation. In addition, Nielsen's panel data augments its retail measurement information in circumstances in which it does not collect data from certain retailers.

The firm's consumer panels collect data from more than 250,000 household panelists across 25 countries who use in-home scanners to record purchases from each shopping trip. In the United States, approximately 100,000 selected households, constituting a demographically balanced sample, participate in the panels.

- **Insights: Analytical Services:** Using its foundation of consumer purchasing information, Nielsen provides a selection of consumer intelligence and analytical services. It draws insights from retail and consumer panel measurement data sets, online behavioral information and a variety of other proprietary data sets.

The firm continually expands an existing database by conducting approximately 8 million surveys annually that capture consumer reaction to new product launches around the world. It also collects and analyzes more than 20 million surveys annually to measure consumer engagement and ad recall across TV and the Web to provide insights on advertising and content effectiveness.

Its analytical services are organized into eight primary categories that follow clients' business development process: growth and demand strategy, market structure and segmentation, brand and portfolio management, product innovation management and services, pricing and sales modeling, retail marketing strategies, marketing ROI strategies and advertising engagement.

- **Insights: Advertiser Solutions:** Nielsen's Advertiser Solutions offering will integrate data from its Buy and Watch segments and use the analytical services noted above to provide end-to-end services directly to advertisers.

Nielsen's two research units employ an estimated 32,900 full time worldwide. Nielsen's offices are located in 82 countries.



2

KANTAR
Kantar.com

NAME **Eric Salama, 50**
 TITLE **Chairman and CEO**
 EDUCATION **M.Sc., Birkbeck College,
 London**

Kantar, based in London and Fairfield, Conn., was founded in 1993 and is the consumer insights division of WPP plc, a London-based public company.

Research-only revenue in 2010 was estimated at \$3,183.6 million, up 3.9% from 2009. In 2010, 75.0% of total research-only revenue, or \$2,387.7 million, was estimated from outside the United Kingdom.

The growth rate excludes 2009 and 2010 revenue from the 2009 acquisitions of Zology in China in February, Alsted Research Aps in Denmark in February, Red Dot Square Solutions Ltd. in the United Kingdom in February and Saffron Hill Research in Singapore in July, and the 2009 sales of MediaFAX Inc. in Puerto Rico in June and Market Research Bureau in Ireland.

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

The group comprises the following 13 research and nonresearch business units: Added Value, Center Partners, Kantar Health, Kantar Japan, Kantar Media, Kantar Retail, Kantar Worldpanel, Lightspeed Research, Millward Brown Group, TNS (TNS/Research International in selected markets), The Futures Co., IMRB International and Kantar Operations.

Kantar's worldwide services include the following:

Added Value

Added Value (Added-Value.com) focuses on brand development and marketing insight through its Brand Connections methodology, providing services in the areas of brand marketing, consumer insight, innovation and communications. It has 22 offices in 14 countries.

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

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

Kantar Health

Kantar Health (KantarHealth.com) incorporates the Ziment Group, Consumer Health Services, All Global, Mattson Jack Group and TNS Healthcare businesses, all

of which specialize in healthcare primary research and consulting.

The group has four practice areas: treatment value, brand and stakeholder management, commercial

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development and marketing insights. It conducts a number of well-known branded studies on areas of consumer health including the National Health and Wellness Survey. It also has established three global consultancies in the areas of oncology, market access, and integrated marketing and media.

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

Kantar Japan

Kantar Japan (Jp.KantarGroup.com) combines two entities, Japan Kantar Research (JKR) and TNS Infoplan, representing Kantar's Japanese research companies under one roof.

The company provides a full range of services from Kantar's global offer to Japanese clients. JKR was formed through the consolidation of four of Kantar's operations (Research International, Millward Brown, Added Value and Lightspeed Research) in 2007. TNS Infoplan is a joint venture set up by TNS with local partners and now belongs to Kantar Japan, working alongside JKR.

Kantar Media

Kantar Media (KantarMedia.com), operating in more than 50 countries, offers a range of media insights and audience measurement services through its global business sectors: Intelligence, Audiences, and TGI and Custom; through its companies including Compete, Cymfony and SRDS Media Solutions; and through the services it provides including KantarSport, CMAG and Marx.

Kantar Media brings together the specialist media capabilities of TNS Media Intelligence, TNS Media Research, KMR and TGI. The business is organized into four key operations: Kantar Media Intelligence, Kantar Audience Measurement, TGI Global and an integrated company covering all disciplines in the U.S. market. The business also includes Compete and Cymfony and is pursuing the development of the Return Path Data initiative.

Kantar Retail

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

24 countries. In July 2009, it merged with the TNS 6th Dimension panels operation.

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

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

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

Millward Brown Group

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

Millward Brown (MillwardBrown.com) provides a full range of qualitative, quantitative and consulting services focusing on brands, marketing communications, media and marketing effectiveness. The company operates in 51 countries through 78 wholly owned or licensee offices.

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

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

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

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

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

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

TNS

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

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

TNS includes both custom approaches and proprietary techniques. Proprietary techniques include: 6dTV (interactive online research platform), AdEval (advertising evaluation), BPO (brand equity research), Conversion Model (commitment measurement), FutureView (identifies future shapers), Insightment (insight generation), Concept eValue (concept screening), Launch

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

Kantar Worldpanel

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

Operating in more than 50 countries, Worldpanel covers a spectrum of manufacturers, retailers and suppliers in consumer sectors including CPG, impulse products, fashion, baby, telecom and entertainment, among others.

Lightspeed Research

Lightspeed Research (LightspeedResearch.com) has online and mobile panels with 3.5 million panelists in

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eValuate (sales forecasting and launch optimization), Market ContactAudit (marketing communication effectiveness), Matrix (opportunity identification), Need-scope (motivational research), Super Clinic (concept refinement), Super Group (ideation and concept development), Tri*M (stakeholder management), WebEval (website evaluation) and Value-Manager (price and product optimization).

The Futures Co.

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

IMRB International

IMRB International (IMRBint.com) is a full-service research agency based in Mumbai, India, and operating across 15 countries in the Indian subcontinent, Southeast Asia and the Middle East. The firm is the Walker licensee of customer satisfaction measurement services within India, and offers a range of custom and syndicated services in media and panel research, customer satisfaction, business and industrial research, Internet-related research, social and rural research and qualitative research.

Kantar's businesses employ an estimated 21,800 research-only employees worldwide.



3

IMS HEALTH INC.
IMSHealth.com

NAME **Ari Bousbib, 48**
TITLE **Chairman and CEO**
EDUCATION **M.B.A., finance, Columbia University**

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

Revenue in 2010 was estimated at \$2,211.6 million, up 0.3% from 2009. In 2010, 63.8% of total revenue, or \$1,410.5 million, was generated outside the United States. The growth rate excludes 2009 and 2010 revenue from the 2010 acquisition of Brogan Inc. in Canada in July.

IMS is a leading provider of information services for the healthcare industry around the world. The firm brings together deep industry experience, innovative approaches and a global technology infrastructure to provide perspectives and in-depth analytics

on market dynamics. With a presence in more than 100 countries and office in 74 countries, IMS offers services to pharmaceutical manufacturers, providers, payers, government agencies, policymakers, researchers and the financial community.

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

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

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

IMS employs an estimated 7,000 worldwide.



NAME Klaus L. Wübbenhorst, 55
TITLE CEO
EDUCATION Ph.D., Technical University, Darmstadt, Germany

GfK SE is a public company based in Nuremberg, Germany, which was established in 1934 and is listed on the Frankfurt Stock Exchange.

Revenue in 2010 was \$1,716.2 million, up 7.3% from 2009. In 2010, 73.7% of total worldwide revenue, or \$1,265.4 million, was from outside Germany.

The growth rate excludes 2009 and 2010 revenue from the 2009 acquisitions of Etilize Inc. in the United States in January, Market Insight in Egypt in January, dmrkynetec in the United Kingdom in February, ORG-GfK Marketing Services in India in July, Ascent Market Intelligence Ltd. in the United Kingdom in August, IFOP Music in France in July and Conecta Asociados S.A.C. in Peru in October, and the 2010 acquisitions of Agricultural Information Services in the United Kingdom in April and Interscope LLC in the United States in November.

GfK is a worldwide market research organization providing services in three business sectors: custom research, retail and technology, and media.

Custom Research

The Custom Research sector provides information and consulting services for operational and strategic marketing decisions in more than 80 countries worldwide. Point of consumer is the data source for this sector. It offers a broad range of ad hoc studies as well as tests and studies, in particular, for product and pricing policy, brand management, communications, distribution and customer loyalty. GfK monitors products and services from development and launch through maturity to the saturation phase.

Retail and Technology

Point of sale is the data source for the Retail and Technology sector. The sector supplies information and consulting services based on retail data from continuous surveys and analyses of technical consumer goods and services in the retail sector in more than 80 countries worldwide. The services include regular surveys on the market

segments office communications, photographic technology and optics, electrical household appliances, information technology, telecommunications, sports equipment, tourism, consumer electronics and entertainment media.

Media

The Media sector delivers information services on the range, intensity and nature of media usage and acceptance in 30 countries in Europe and in the United States. The data source for the Media sector is the point of media. The services are directed at clients from media companies, agencies and the branded goods industry. The range of available services includes continuous, as well as special one-off, studies and analyses. The data sources for the Media sector come from TV, radio, print, outdoor advertising and online.

GfK has 152 subsidiaries and branch offices operating in 65 countries, and 10,546 full-time employees offering market research services in more than 100 countries.



NAME Didier Truchot, 64
TITLE Chairman and CEO
EDUCATION Economics, Panthéon-Sorbonne, France

Ipsos SA, in Paris, was founded in 1975 and listed on the Paris Stock Exchange in July 1999. It is now part of the Premier Marché of EuroNext Paris Stock Exchange.

Revenue in 2010 was \$1,512.8 million, up 8.3% from 2009. In 2010, revenue generated from work conducted outside France was \$1,383.0 million, or 91.4% of total revenue.

The growth rate excludes the 2009 and 2010 revenue from the 2009 acquisitions of Punto de Vista in Chile in March, and Market Research Bureau of Ireland Ltd. in July, and the 2010 acquisitions of OTX in the United States in January and APEME in Portugal in January.

Ipsos is a global market research firm that is both controlled and managed by research professionals. Ipsos' strategy comprises a selective acquisition policy, a multi-specialist positioning and a Global PartneRing program for key clients.

The firm's teams are experienced in six specializations:

- Ipsos ASI, the advertising research specialists, helps define advertising concepts and measure and forecast the effectiveness of marketing communications. Its staffers deliver performance evaluation with comparable results across the various countries in which its clients are operating.
- Ipsos Marketing, the innovation and brand research specialists, provides strategic or tactical information about markets and brands, whether to launch new products, understand consumer behavior or analyze and track brand performances in their market. Experienced special teams from consumer goods, industry and services, and health and qualitative divisions offer business services that include forecasting, modeling, market knowledge and consumer insights.

- Ipsos Public Affairs, the social research and corporate reputation specialists, delivers research on social issues and the attitudes and behaviors of citizens and consumers. Its research is based not only on public opinion, but also on elite stakeholder, corporate and opinion research. In partnership with Thomson-Reuters, it delivers multicountry polling results on consumer attitudes and issues, economic confidence, and other timely occurrences in geopolitics and the policy environment.

- Ipsos MediaCT, the media, content and technology research specialists, is a global leader in research-based services that connect media, contents and technology. It offers experience in a wide range of research techniques to companies in the media, entertainment, video games, online services, telecoms and technology industries.

- Ipsos Loyalty, the Customer and Employee Research Specialists, offers a range of services in the area of customer satisfaction research, coupled with its experience in staff research.

Ipsos is equipped with systems for collecting and processing data which are now promoted by Ipsos Observer, the Data Collection and Delivery Specialists. Their objective is to ensure high quality and cost-effective services through all forms of fieldwork, across any sample type, virtually worldwide.

The newly created research and development center, Ipsos Open Thinking Exchange, will develop new approaches and methods to encourage consumer participation. Its mission is to deliver new research tools based on digital technology.

In 2010, emerging markets accounted for more than 30% of total Ipsos revenues. During the year, it integrated OTX acquisition and launched the Ipsos Open Thinking Exchange, an R&D center which includes digital marketing and social networking.

Ipsos is present in 67 countries and employs 9,498 full time worldwide.



NAME Robert Philpott, 50
TITLE Global CEO
EDUCATION B.A., business studies, Manchester University, United Kingdom

Synovate, based in London, was created in 2003 and is the market research arm of Aegis Group plc, a London-based public company listed on the London Stock Exchange. In July 2011, Aegis agreed to sell Synovate to Ipsos SA.

Revenue in 2010 was \$884.8 million, up 5.9% from 2009. In 2010, revenue from outside the United Kingdom was \$776.3 million, or 87.7% of total revenue.

The growth rate excludes 2009 and 2010 revenue from the 2010 acquisitions of Firm United Healthcare Ltd. in the Netherlands in May and COMCON in Russia in December. In 2010, Aegis Group's revenue was \$2.3 billion.

Synovate is a global market research firm that generates consumer insights by providing integrated research

metrics and ensuring that those metrics are more predictive of business outcomes. The firm is based around a borderless organization with a flexible structure that allows it to create teams and processes that meet client-specific requirements.

Its clients range from Fortune Global 500 companies to entrepreneurial start-ups and come from all sectors of business: CPG, healthcare, automotive, financial services, petrochemicals, media and advertising, government, retail, restaurants, technology/telecom and more.

Synovate's global capabilities include:

- **Brand & Communications:** The firm offers Brand Value Creator, Market Barriers, BrandLife and other brand research services to grow brands, assess obstacles and track the impact of communications on performance. Synovate's brand research also can be integrated with its customer experience and shopper research capabilities, providing a holistic view of customers.
- **Customer Experience:** This includes True Customer View, a customer research tool that considers the multiple influences on customers, including competition and barriers, and SmartTracking, a customized ongoing data collection and reporting for transactional research. CE works with chief customer officers to measure, model and manage customer experience, satisfaction and loyalty.
- **MarketQuest:** This service guides clients through the entire product development process, from initial concept to pricing and packaging and ongoing performance monitoring, to ensure effective market decisions and accurate volume estimates.
- **Shopper Insights:** Synovate Shopper Insights identifies key category and brand shoppers, understands and quantifies positive and negative in-store factors impacting brand and channel performance, and optimizes the shelf to maximize retail performance. Equipment allows retailers to count, track and study shopper behavior in-store during all times of the day to assess the impact of promotions, displays, store locations, layouts and other factors.
- **Syndicated Services:** Synovate's syndicated studies include PAX and EMS, which examine media behavior and product ownership among affluent consumers; Media Atlas, which covers media consumption, product ownership, brand relationship and lifestyles/attitudes among general consumers in key Asian markets; Young Asians, which examines youth behavior across 12 Asian markets; Mail Monitor, which tracks direct mail credit card offers in the United States; Customer Satisfaction Index, which tracks Canadians' satisfaction with their financial institutions; DuraTrend, which tracks Americans' purchases of household durable goods; and Household Equipment Canada (HEC), which tracks durable purchases in Canada.

Synovate currently has offices in 64 countries with the ability to conduct market research in an additional 75 countries. The firm employs 5,902 worldwide.



NAME **John G. Freeland, 57 (pictured)**
 TITLE **President and CEO**
 EDUCATION **M.B.A., Columbia University**

NAME **Romesh Wadhvani, 63**
 TITLE **Chairman**
 EDUCATION **Ph.D., electrical engineering, Carnegie Mellon University**

SymphonyIRI Group Inc. (SIG), formerly IRI, based in Chicago, was founded in 1979 and became a public company in 1983. It was acquired in 2003 by Symphony Technology Group and in July 2011 sold to private equity firm New Mountain Capital LLC.

Revenue in 2010 was \$727.0 million, up 4.6% from 2009. In 2010, 37.1% of total revenue, or \$270.0 million, was generated from outside the United States. The growth rate includes the 2009 and 2010 revenue of Hendry Corp., acquired in September 2009.

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

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

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

Market Measurement

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

- **InfoScan Retail Tracking:** The census-based InfoScan point-of-sale (POS) tracking service provides access to detailed information on sales, share, distribution, pricing and promotion across a wide variety of retail channels and accounts.
- **AllScan Convenience Store Tracking:** The AllScan tracking service provides scanner-based POS data across the entire convenience channel, using data from more than 15,000 sample convenience stores.

Industry Vertical Focus offers vertical experience and customized products and services for multiple industry verticals, including healthcare and wellness, center store, confections, beer, wine, spirits, tobacco, bakery and dairy. These include:

- **Healthcare Insights:** The firm's Healthcare Solutions Group provides pharmaceutical, healthcare and CPG companies and retailers with consumer

intelligence, targeting and analytic services for the healthcare marketplace. It offers a complete suite of retail tracking, consumer panel, and analytic-driven products and services under the RxPulse brand.

- **Beverage Alcohol and Tobacco Industry Insights:** SIG provides insights through an integrated view of the beverage alcohol and tobacco industries. The retail tracking products and analytics are scaled to specifically meet the beverage alcohol and tobacco industry needs, providing manufacturers and distributors with retail sales trends, and purchase behavior and consumer insights in grocery, drug, mass merchandise, convenience, liquor and club stores.

Symphony Solutions & Services

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

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

Symphony Advantage

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

- **Brand Advantage** is a user-friendly online media planning and analytical application that is delivered over the Web. It recommends optimal marketing spending and gives users the ability to overlay business requirements to drive incremental marketing ROI. It analyzes, plans, assesses and adjusts marketing dollars and uses diagnostic reporting to compare alternative scenarios and determine the best media mix.
- **Shopper Insights Advantage** provides insights into shopper behavior combining content, such as built-in scorecards and best-practice analysis templates, with the speed and flexibility to identify opportunities to attract shoppers, drive trips and increase basket value.
- **Market Advantage** provides emerging trends and growth drivers with dashboards and best-practice analyses for marketplace insights to elevate retailer partnerships.

- Sales Advantage uses total store data for sales forces to create insight into strategy, retailer performance and overall go-to-market behavior through the lens of retail partners, competitors and consumers. Results are driven by automated workflows, scorecards and best practices that are customized to specific needs and supported by SymphonyIRI's consulting services and change-management experience.
- Total Store Advantage includes an integrated database of all edibles and nonedibles in the CPG industry, organized by department, aisle and category.
- Price & Trade Advantage gives insight on price sensitivities, gaps, thresholds, competitive implications and sales volume decomposition to maximize sales and create the most effective pricing and trade plans at retail.
- Loyalty Advantage leverages transactional and loyalty data to drive retail decision-making through a collaborative analytical process with vendor partners.

Symphony Analytics

Symphony Analytics provides a combination of predictive analytical techniques, proprietary rapid-modeling platforms, automated services and experienced analytics consulting talent for CPG and retailer clients. It focuses on the strategic and operational needs in sales and category management, marketing and brand management, strategy and demand planning to deliver analytics and both commercialize and monetize insights.

Symphony Consulting

In 2010, SIG continued the expansion of its consulting and innovation practice for delivering consulting and strategic advisory services. Symphony Consulting offers advisory services in sales and marketing for C-level management within the CPG and retail industries. The group focuses on four key practice areas: strategic pricing, growth and innovation, shopper marketing, and customer and channel management. Symphony Consulting is composed of experienced consultants from top-tier strategy consulting firms who have successfully completed hundreds of engagements focused on developing long-term strategic and collaborative relationships.

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



NAME **James E. Smith, 62**
TITLE **President and CEO**
EDUCATION **Ph.D., sociology, University of Southern California**

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

Revenue in 2010 was \$455.3 million, down 9.4% from 2009.

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

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

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

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

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

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



NAME **Kenji Miyakubi, 53**
TITLE **President and representative director**
EDUCATION **Ehime University, Japan**

INTAGE Inc., based in Tokyo, was founded in 1960 and listed on the Tokyo Stock Exchange in November 2001 and as of March 2009 on its First Section.

Revenue was \$416.2 million for the fiscal year ended March 2011, up 4.7% from fiscal year 2010. In fiscal 2011, 3.1% of revenue, or \$12.7 million, came from outside Japan. The growth rate includes the fiscal year 2010 and fiscal year 2011 revenue from the 2010 acquisition of Hyperlink Marketing Research Co. in Shanghai in October.

INTAGE addresses management strategy and issues through marketing and business intelligence in consumer markets, service industries and healthcare sectors in three areas:

- **Marketing Tracking:** INTAGE provides syndicated data services through its data delivery systems. Information details retail sales trends, consumer buying behaviors, sales promotion activities and other market indicators. Market tracking services offered include syndicated POS retail panel services (SRI, SDI); syndicated consumer panel services (SCI, SLI, SCI-personal); syndicated promotion effectiveness measurement panel services (SPI, IFI); kitchen diary; price and store sales promotion analysis packages (price elasticity analysis, APRiCOT); MR (medical representative) activities effectiveness panel service (Rep Track); and integrated marketing research data delivery systems (Partner & Brains, RESME).
- **Customized Services:** INTAGE addresses needs for customized services in management, strategy and strategy implementation evaluation, and business process efficiency. The firm leverages technology and systems as well as marketing research resources and capabilities to optimize marketing activities and business processes via customized research, global research, medical marketing research, Internet-based marketing research, social marketing research, system applications and operation (system development, data processing outsourcing, system operation services), and analytical tools and applications (self-choice, brand management tables, brand equity analysis models, advertising effectiveness measurement models, Lyche Pro).
- **Strategic Solutions:** INTAGE combines information technology, system development capabilities and marketing intelligence to construct business application systems to address strategy issues and operating environments. Database services apply data utilization and analysis tools for support systems. The firm offers integrated services (INTAGE-CRM, data mining and customer portfolio management tools), business reliability planning and business process outsourcing services, drug development solutions (CRO, SMO services), supply chain management services (supply and demand planning, logistics planning), micro-area

marketing applications (AreaManager) and business application products (Job Hunter).

INTAGE Marketing Consulting (Shanghai) Co. Ltd. and Hyperlink Marketing Research Co. Ltd. merged and established a new company, INTAGE China Inc. in March 2011. Also, INTAGE (Thailand), which established a joint investment with Research Dynamics in Thailand in 2008, will acquire the company in June 2011.

The firm has 1,997 full-time employees worldwide.



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ARBITRON INC.
Arbitron.com

NAME **William T. Kerr, 70**
TITLE **President and CEO**
EDUCATION **M.B.A., Harvard Business School**

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

Revenue in 2010 was \$395.4 million, up 2.6% from 2009. In 2010, 1.3% of total revenue, or \$5.0 million, came from outside the United States. The growth rate excludes 2009 and 2010 revenue from the acquisition of Integrated Media Measurement Inc. in June 2010.

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

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

Media Services

- **Measuring Local Market U.S. Radio Audiences:** Arbitron measures the size and composition of radio station audiences by periodically surveying radio listeners in approximately 280 U.S. markets. It has commercialized the Portable People Meter (PPM) ratings service in the top 48 U.S. radio markets.
- **Measuring National U.S. Radio Audiences:** Arbitron also provides measurement of network radio audiences through its two national ratings services: RADAR and Nationwide. The RADAR service provides a measurement of national radio audiences and the audience size of network radio programs and commercials for more than 55 separate radio networks.
Radio Nationwide is a source for local and regional market network ratings. Data, issued twice each year, are based on the firm's fall and spring surveys.
- **Surveying Consumers in Local Markets:** In addition to its radio ratings service, Arbitron also provides consumer profiles of radio listeners, broadcast and cable TV viewers, newspaper readers and consumers reached by outdoor and out-of-home advertising displays.

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These profiles contain detailed socioeconomic data and information about what consumers buy, where they shop and what other forms of media they use. Arbitron provides measurements in approximately 270 local markets in the United States through the Scarborough service and two other services that conduct ongoing consumer surveys.

- **Providing Application Software:** The firm also provides software applications that give access to media and consumer information from Arbitron and other research providers. The software assists in making media buying and selling decisions, and in managing and programming radio stations.

Portable People Meter System

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

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

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

Arbitron has entered into arrangements with media information services companies, including Kantar Media, which use PPM technology in their audience measurement services in specific countries outside the United States. PPM technology is currently being used for media measurement in seven countries, including four that have adopted PPM technology for measuring both TV and radio.

PPM technology also has been used for TV currency ratings in Montreal and Quebec since 2004. In 2009, BBM Canada launched a combined panel for TV and radio audience measurement using PPM technology covering nationwide audience measurement and measurement in the following metropolitan areas: Montreal, Toronto, Vancouver, Calgary and Edmonton.

Cross-Platform Media Measurement

Arbitron is developing cross-platform services that focus on the consumer, whether in his home or away from home. Based on its PPM system, which is capable of measuring audiences for programming

and advertising purposes across multiple media, broadcasters, content providers and advertisers would receive more complete pictures of their audiences and comprehensive measures of advertising impressions.

Arbitron provided cross-platform audience ratings services to NBC Sports, a division of NBC Universal Inc., together with online marketing research and analytics companies comScore Inc. and Omniture, for the



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Vancouver 2010 Olympic Winter Games. And the firm is currently collaborating with Turner Broadcasting Systems Inc. for measuring the out-of-home, in-home and combined viewing of certain programming.

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

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

Arbitron has 1,113 full-time employees worldwide.



11

THE NPD GROUP INC.
NPD.com

NAME **Tod Johnson, 66 (pictured)**
TITLE **Chairman and CEO**
EDUCATION **M.S.I.A., Carnegie Mellon University**

NAME **Karyn Schoenbart**
TITLE **President and COO**

NAME **Tom Lynch**
TITLE **CFO and COO**

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

Revenue in 2010 was \$240.1 million, up 5.5% from 2009. In 2010, 27.7% of total revenue, or \$66.4 million, was generated from work conducted outside the United States. The growth rate excludes the 2009 and 2010 revenue from the acquisitions of Solarbuzz in March 2010 and LGI Network in May 2010.

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

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

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

NPD's national retail tracking services are based on point-of-sale store movement information collected from 950 retail partners representing about 165,000 doors worldwide. It also offers market- and store-level tracking and advanced analytics at various geography levels, including designated market

areas, census regions and custom areas such as client retail trading areas in the United States and Europe. The firm monitors commercial sales of information technology products through an alliance with the Global Technology Distribution Council, whose members constitute approximately 80% of the IT distributor market.

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

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

In addition to its offerings in the U.S., NPD offers services in both Canada and Mexico. In Canada, NPD offers POS and consumer panel information for the consumer technology, commercial technology, entertainment, fashion and foodservice industries, as well as food and beverage consumption; in many cases, consumer information is collected from NPD's Canadian online panel. In Mexico, NPD's primary business is retail tracking in the consumer technology market.

In Europe, NPD offers information for the beauty, foodservice, sports and toy industry sectors. Tracking services are provided in 12 European countries and are composed of both consumer and retail tracking services.

In Asia Pacific, NPD offers tracking services for apparel, beauty, foodservice, sports, toys and video games. Services are available in Japan, China, Australia and New Zealand. Services also are available in Korea and Taiwan through NPD's Technology Analyst Business.

In 2010 the firm continued its international expansion, launching consumer tracking services for foodservice in Russia and sports in Brazil.

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

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

The firm, which has offices in 25 cities around the world, has 1,135 full-time employees.



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J.D. POWER AND ASSOCIATES
JDPower.com

NAME **Finbarr O'Neill, 58**
TITLE **President**
EDUCATION **J.D., Fordham University Law School**

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



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Research-only revenue in 2010 was estimated at \$231.4 million, down 5.4% from 2009. Revenue from outside the United States in 2010 was estimated at \$84.1 million, or 36.3% of total research-only estimated revenue.

JDPA is a global marketing information services company that conducts independent consumer surveys of product and service quality, customer satisfaction and buyer behavior. Services include industry-wide and client-commissioned research, B-to-B consulting, automotive forecasting and media research.

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

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

The firm's clients include many Fortune 500 companies in the United States and many internationally. JDPA has seven U.S. offices and locations in nine countries internationally. It has 730 full-time employees worldwide.

markets, VR reports both household and individual ratings using the VR People Meter.

Radio rating research is conducted in the Tokyo, Osaka and Nagoya markets four to six times per year with samples of 3,000 per wave.

The firm releases a number of media-related reports:

- The Nationwide Newspaper Readership Survey (J-READ) gathers and organizes standardized data on newspapers throughout all 47 prefectures of Japan. This



13
VIDEO RESEARCH LTD.
VideoR.co.jp

NAME **Itsuma Wakasugi, 65**
 TITLE **President and CEO**
 EDUCATION **J.D., B.A., business and commerce, Keio University, Japan**

Video Research Ltd. (VR), based in Tokyo, was founded in 1962 by a consortium of Japanese broadcasting companies, major advertising agencies and advertisers.

Revenue for the fiscal year ended March 2011 was \$212.0 million, down 1.2% from fiscal year 2010. Revenue has been provided in a VR public release and has not been confirmed independently.

VR is a media and marketing research firm whose major clients are in the broadcasting, advertising and CPG industries.

VR's main service is TV audience ratings research. It is based on a sample of 6,600 households equipped with set meters for household TV ratings in 27 markets throughout Japan. In the Kanto (including Tokyo) and Kansai (including Osaka)

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Mikael Taieb, Director
Tel: 00 33 1 42 68 12 26
Fax: 00 33 1 42 68 12 25
Email: mikael@puzzleparis.com
Web: www.puzzleparis.com

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

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

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

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

Sixty-five percent of our clients are American companies.

one-week survey of newspaper browsing is designed to measure items such as media contact, lifestyle, consciousness and product use to shed more light on how reader ad targets interact with newspapers. Its Readership and Profiling of Readers of Free Papers and Free Magazines (J-AIR) uses J-READ data.

- The MAGASCENE report is a single media survey implemented every October in seven major regions in Japan. It provides information such as how people read each magazine; reader profiles with information such as basic attitude, awareness in daily life and media involvement; as well as a magazine quality category that includes magazine image, frequency of read, place of purchase and reading attitude.
- The SOTO report, called the Out-of-Home Media Integrated Survey, improves and enhances the existing survey for out-of-home media in Tokyo within a 30-kilometer radius. The survey covers railroad usage, automobile usage, visits to the major towns and their vicinities, and purchasing behavior. SOTO started in the Kansai area in 2009.

A subsidiary of VR, Video Research Interactive Inc., conducts various types of Internet-related marketing research such as website contact status by panel survey, visitor profile analysis and mobile website surveys.

Its Audience and Consumer Report (ACR), is VR's syndicated research, which was started in 1972. It is designed to study consumer trends and media contacts in the Japanese market through a single-source approach. The Media Contact Report (MCR), started in 1985, provides insight into the daily "media lifestyle" of a target audience.

VR also launched new syndicated services: the Communication Drive report, Campaign Karte and TV-CM Scope for measuring and evaluating TV commercials.

VR Data Cupid-Age File is a marketing analysis tool of VR syndicated services that provides easy analysis of communication targets in detail.

VR has 393 full-time staff operating in its Tokyo office and other regional offices in Japan, New York and Bangkok, Thailand.



NAME **Carlos Montenegro, 57**
 TITLE **President**
 EDUCATION **B.S., economics, University of Gama Filho, Rio de Janeiro, Brazil**

IBOPE Group in São Paulo, Brazil, was founded in 1942 and is privately held.

Research-only revenue in 2010 was \$210.8 million, up 25.8% from 2009. In 2010, 18.4% of research-only revenue, or \$38.8 million, came from work conducted outside Brazil. The growth rate excludes revenue for 2009 and 2010 from the acquisitions of Media Fax Inc. in Puerto Rico in June 2009, IBOPE Monitor de Verificacao Publicitaria in Brazil in August 2009, Zogby International Research LLC in the United States in January 2010, and IBOPE Inteligencia Chile in 2010.

Revenue and growth rates exclude research companies in which IBOPE owns 50% or less. Also excluded are nonresearch companies, including Megadata in Brazil and Markdata Europe.

IBOPE is a Brazilian multinational research company operating in Brazil and Latin American markets and specializing in media, public opinion, voting intention, consumption, behavior, marketing, branding and other issues.

IBOPE is composed of three major businesses: IBOPE Media, IBOPE Inteligencia and IBOPE Educacao. IBOPE Media is responsible for media research, advertising investment and consumption habits. It offers a product line that includes audience measurement of different media, mainly TV and cable TV, analysis and checking of publicity investment, and syndicated research on consumers' habits and behavior regarding media, advertising agencies and advertisers in 14 Latin American countries.

IBOPE Inteligencia provides market, behavior, brand, public opinion and Internet research used to develop business strategies in marketing and product development, as well as to broaden innovation. It performs custom qualitative and quantitative studies, as well as diagnostic and strategic sector reports. The business offers customized services and has offices in Brazil, Argentina, Chile, Mexico, Puerto Rico and the United States.

Recently, the firm created the IBOPE Educacao business unit dedicated to executive education and training professionals involved in strategic decision making. It integrates current academic content with information from both IBOPE and its clients.

IBOPE has major stakes in two companies: IBOPE Nielsen Online and Millward Brown Brazil. The former, a joint venture with Nielsen provides information on the behavior of Internet users. The latter, a joint venture with Millward Brown Inc., provides qualitative and quantitative research for building brand identities and health.

The firm has offices and branch offices in 15 countries, and employs 2,259 full time in companies in which it has a controlling interest.

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15

ICF INTERNATIONAL INC.
ICFI.com

NAME Sudhakar Kesavan, 56
TITLE CEO
EDUCATION M.S., technology and policy, Massachusetts Institute of Technology

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

Research-only revenue in 2010 was \$200.1 million, up 9.5% from 2009. In 2010, 23.4% of total research-only revenue, or \$46.9 million, was from outside the United States. The growth rate includes 2009 and 2010 revenue from the acquisition of Marco International in April 2009 from infoGroup Inc. Research and nonresearch revenue was \$765 million for 2010.

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

communities, health, homeland security and transportation markets.

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

- **International Research and Evaluation:** ICF provides training and technical assistance to assist national governments, in-country organizations and international donor agencies with developing indicators and metrics, monitoring and data collection, policy formation and disseminating findings to target audiences.
- **Experimental and Quasi-Experimental Research:** The firm addresses the full life cycle of experimental and quasi-experimental research services, including methodology and study design, quantitative and qualitative data analysis, database and systems development, and reports and the publication of results.
- **Monitoring and Evaluation Capacity Building:** ICF builds program monitoring and evaluation capacity with services, including managing change and communicating developments to grantees or awardees, adjusting data collection systems or indicators to reflect program changes, producing report snapshots to show continued progress, and leveraging existing resources to expand capacity in monitoring and evaluation.
- **Performance Measurement:** The firm's life cycle approach supports U.S. federal agencies, nonprofits and commercial firms with performance measurement tools and techniques, including: developing meaningful and measurable indicators, creating dashboards and balanced scorecards, setting targets and goals for continuous quality improvement programs, and designing and implementing Web-based data management and reporting systems.
- **Program Evaluation:** ICF applies traditional and analytic methods and tools including randomized control trials, propensity score matching, quantitative analysis of designs, ethnographic studies and social network analysis.
- **Quantitative Methods and Analysis:** ICF provides a range of quantitative methods and analysis, including:

Web, telephone, paper and mail, in-person and hybrid surveys; cell phone data collection; sampling and weighting; database development and data management; proprietary modeling of complex systems and analytic methods; and cost benefit analysis.

- **R&E Surveys and Analysis:** The firm's surveys incorporate emerging methodologies and generate strong, defensible response rates. Services include questionnaire and manual development, quality control, FISMA-moderate data security capacity, software development, and the analysis and dissemination of findings.

ICF has 38 full-service offices in the United States and offices in seven countries. Its full-time worldwide staff is 1,107.



16

COMSCORE INC.
comScore.com

NAME Gian Fulgoni, 63 (pictured)
TITLE Chairman
EDUCATION M.A., marketing, University of Lancaster, United Kingdom

NAME Magid Abraham
TITLE President and CEO
EDUCATION Ph.D., management and marketing, Massachusetts Institute of Technology

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

Revenue in 2010 was \$175.0 million, up 15.0% over 2009. In 2010, revenue generated outside the United States was \$32.7 million, or 18.7% of total revenue. The growth rate for 2009 and 2010 excludes revenue from the acquisitions of Certifica Inc. in Chile in November 2009; ARS Group in the United States in February 2010; the products division of Nexius Solutions Inc. in the United States in July 2010; and Nedstat B.V. in the Netherlands in August 2010.

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

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

User Analytics

comScore Media Metrix (CMM) provides Internet audience measurement for advertising agencies, publishers, marketers and financial analysts. CMM reports details of online media usage, visitor demographics and online buying power for the home,

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work and university audiences across 100 local U.S. markets and around the world, including detailed reporting for 40 countries.

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

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

comScore Marketing Solutions (CMS) combines the cS Internet user database with the experience of comScore analysts to deliver insight into the online behavior of consumers for clients in the automotive,

consumer packaged goods, entertainment, financial services, media, pharmaceutical, retail, technology, telecommunications and travel industries.

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

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

cS data and services support numerous applications, including market and competitive intelligence for any online category; benchmarking and opportunity gap/SWOT analysis; customer profiling and segmentation models; the integration and study of online behavioral data with offline purchase data; choice models based on pricing, taxes and promotions, among other factors; controlled measurement of the effectiveness of interactive marketing programs; and the scoring of customer files for direct marketing programs using markers and propensities derived in aggregate within the cS database and applied using shared attributes.

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

Advertising Analytics

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

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

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

Mobile Analytics

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

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

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

cS has 922 full-time employees worldwide, with offices in 18 countries worldwide.



17

HARRIS INTERACTIVE INC.
HarrisInteractive.com

NAME	Al Angrisani, 61
TITLE	CEO
EDUCATION	A.P.C, accounting, New York University

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

Revenue in 2010 was \$166.8 million, down 0.6% from 2009. In 2010, \$72.9 million, or 43.7% of total revenue, was generated outside the United States.

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

It serves clients in 215 countries and territories worldwide through its North American, European and Asian offices, and through a global network of independent market research firms.

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Through its Centers of Excellence, HI offers services and experience in the areas of new product development, brand and communications, stakeholder consulting, reputation management, and youth and education. Its industry experience includes healthcare, public affairs and public policy, energy, automotive, technology, telecommunications, media, financial services, insurance, retail, restaurants and consumer package goods.

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

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

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

HI has 853 full-time employees worldwide in the United States and in international offices in the United Kingdom, Canada, France, Germany, Hong Kong, Singapore and China.

The firm designs, launches and operates customer experience intelligence programs related to the customer voice in nearly 200 countries through stand-alone operations, partnerships and alliances. It

completes more than 14 million online, approximately 6 million telephone, and 4 million mail surveys annually as well as conducting more than 300,000 mystery shops per year. Its approach allows better listening to and



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 **Maritz** RESEARCH



18

MARITZ RESEARCH
MaritzResearch.com

NAME **Michael Brereton, 51**
TITLE **President**
EDUCATION **M.B.A, Bowling Green State University**

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

Revenue in 2010 was \$162.1 million, up 4.8% from 2009. In 2010, 13.1% of total revenue, or \$21.2 million, came from outside the United States. The growth rate excludes the 2009 and 2010 revenue from the October 2010 acquisition of Evolve24 in the U.S and the 2009 revenue from the June 2009 sale of the Pharmaceutical Research Group in the U.S. Maritz Holdings' revenue in 2010 was \$1.2 billion.

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

acting upon whatever customers say, wherever they say it.

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

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

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

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



19

ABT SRBI INC.
AbtAssociates.com

NAME	Kathleen L. Flanagan, 50 (pictured)
TITLE	President and CEO of Abt Associates
EDUCATION	M.S., public policy, University of Rochester
NAME	Mark A. Schulman, 65
TITLE	CEO of Abt SRBI, the survey subsidiary of Abt Associates
EDUCATION	Ph.D., Rutgers University

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

Research-only revenue in 2010 was \$129.4 million, up 17.9% from 2009. In 2010, research-only revenue generated outside the United States was \$42.6 million, or 32.9% of total revenue. Total research and nonresearch revenue in 2010 was \$332 million.

Abt Associates is a global firm in research and program implementation in the fields of health, social and environmental policy, and international development. Known for its approach to solving complex challenges, the firm has seven offices in the United States and subsidiary/affiliate program offices in 37 countries.

Abt SRBI (SRBI.com) is a full-service global research and consulting firm whose survey research capabilities range from sample design and instrument development, through data collection (telephone, in-person, IVR, Web) and data management, to analysis and market strategy. Its emphasis on technical quality ensures confidence in measuring effectiveness, launching new products and improving customer satisfaction.

Abt SRBI has eight divisions:

- The Analytic and Consulting Division has specialized practice groups in banking and finance, insurance, healthcare and media research. Its domestic and global B-to-B research is conducted here.
- The Marketing Insights Division focuses on integrated strategic research approaches, particularly in the CPG, restaurant and retail sectors. It includes Abt SRBI's large-scale customer satisfaction survey offering using innovative methods and technologies, including IVR.
- The Government Division conducts large-scale surveys and tracking studies for many U.S. government agencies. These projects include epidemiological surveys, healthcare, military veterans, immigration, domestic violence and program evaluations.
- The Public Policy and Public Affairs Division conducts large-scale public policy and public opinion surveys for university researchers, foundations, research institutes and the media. This division is responsible for Abt SRBI's public opinion polling for *Time* magazine and other media.
- The Transportation Division provides passenger and customer research to leading public transit authorities, transportation planners and engineering firms. This includes household travel surveys, origin and destination studies, new product and service testing, pricing and passenger satisfaction research.
- The Utilities Division serves the electric utility industry. Studies include customer satisfaction and loyalty, marketing issues and the impact of industry deregulation.
- The Interviewing Services Division conducts telephone, mail, Internet, IVR and in-person interviewing for other marketing research firms. Abt SRBI has five centralized, fully supervised CATI facilities with nearly 450 stations.
- The Advanced Methods Group provides consulting support in areas such as complex sample design, nonresponse error, cell and dual-frame sample designs, weighting and geographic information systems (GIS).

Abt has nearly 1,900 full-time employees, of which 819 work full time for Abt SRBI in market research.

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20

MACROMILL INC.
Macromill.com

NAME Tetsuya Sugimoto, 44
TITLE Chairman and president
EDUCATION B.S., social science,
Waseda University, Tokyo

Macromill Inc., based in Tokyo, was founded in 2000 and listed on the Tokyo Stock Exchange in 2004. It moved to the exchange's First Section in 2005.

Revenue in 2010 was \$115.0 million, up 16.2% from 2009. Revenue in 2009 and the growth rate exclude the sale of subsidiary AIP Corp. in Tokyo, which was sold October 2009, and 2009 and 2010 revenue from the acquisition of the marketing research business of Yahoo Japan Value Insight Corp. in August 2010.

Macromill specializes in research services using the Internet in Japan. The firm has developed its Automatic

Internet Research System (AIRs), which automatically manages all of the research processes, including creating Web questionnaires, sampling targeted panelists, sending requesting mail to respondents, collecting data, tabulating data in real time and creating a report file.

The firm's main service is QuickMill, a low-priced, high-speed Internet research service that uses AIRs and a 985,400-member research panel.

Macromill also provides a variety of services, such as customized research, MobileMill (Internet research using mobile phones), GlobalMill (international Internet research), M3Mill (Internet research targeting the medical industry that incorporates So-net M3, the largest medical portal site in Japan) and more.

The firm has three subsidiaries:

- Brand Data Bank Inc. collects the data of 30,000 people's property or preferences such as brands purchased in 130 categories and conducts analysis of this data.
- M-Warp Inc. develops and services smartphone research applications and conducts an ASP business based on its AIRS.



21

**LIEBERMAN RESEARCH
WORLDWIDE**
LRWonline.com

NAME Arnold Fishman, 66
TITLE Founder and chairman
EDUCATION B.S., Brooklyn College, City University
of New York

NAME David Sackman, 53 (pictured)
TITLE President and CEO
EDUCATION B.A., University of California at Los
Angeles

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

Revenue in 2010 was \$100.8 million, up 14.5% from 2009. In 2010, \$18.5 million, or 18.4% of total revenue, was generated outside the United States.

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

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

LRW emphasizes five core areas of research experience:

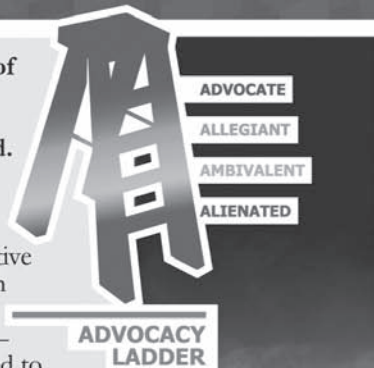
- **Strategy Development and Segmentation Research:** Strategy experience is LRW's core strength. In segmentation research, the firm determines targets, optimizes marketing mix and develops strategies to maximize performance within target segments. It also deploys techniques and analytic processes to understand where value resides within brands along with the implications for brand building. LRW uses both fusion and segmentation by optimization for reaching unique segments and gaining a clearer understanding of needs. Blending the two segmentation approaches with trade-off analyses enables the firm to optimize product coverage and line demand for target segments.
- **Brand Strategy and Tracking:** LRW continues to expand its brand practice with its R&D-based Relevant Clarity brand paradigm, which links brand equity directly to financial performance. This product helps directly manage the contribution of brands to changes in sales and profitability.
- **Customer Satisfaction Diagnostic Evaluation and Tracking:** LRW's experience in analyzing consumer attitudes and behavior has enabled the firm to successfully link customer satisfaction to financial performance. LRW's approach helps to identify specific behaviors and actions that can be undertaken to

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



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improve financial results. It provides continuous improvement and feedback delivered directly to stakeholders via intuitive dashboards and other online analytical tools.

- **New Product Development:** Using analytical techniques, LRW provides product optimization studies with actionable deliverables. The firm uses proprietary methodology including Ideation and Evolution to generate approaches to new product development.
- **Actionability Suite:** LRW offers the Actionability Suite of products to engage stakeholders in the research process. It consists of four distinct approaches built upon an action-oriented philosophy: Immersion, Lieberman Learning Labs, Actionability Workshops and Synthesis.

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

In 2011, the firm plans to expand its Asia operations in Shanghai; unveil an evolved brand equity tracking paradigm based on significant R&D efforts; and expand

the use of a matrix management approach to further expand its ability to deliver "so what?" thinking.

LRW employs 368 full-time employees. Data collection capabilities include Web hosting of 2,000+ simultaneous surveys, 740+ IVR ports across 15 servers at multiple locations, and five telephone centers with 525 CATI stations and the capability to conduct interviews in more than 67 languages.

In addition to its Los Angeles headquarters, the company has offices in London; Shanghai, China; New York; Chicago; Charlotte, N.C.; and Huntington Beach, Calif.



22

ORC INTERNATIONAL
ORCInternational.com

NAME **Marc Litvinoff, 50**
TITLE **President**
EDUCATION **B.S., banking, finance and investments, Hofstra University**

ORC International (ORC) in Princeton, N.J., (formerly Opinion Research Corp.) was founded in 1938. In July 2011, it was acquired from Infogroup Inc. by private equity firm Lake Capital.

Revenue in 2010 was \$98.0 million, down 1.9% from 2009. In 2010, 34.8% of total revenue, or \$34.1 million, was from work conducted outside the United States. The U.S. revenue for 2009 and growth rate excludes Macro International, which was sold to ICF International Inc. in April 2009.

ORC delivers insight in areas impacting customers, markets, brands, product and service offerings, and employees, with focused experience in financial services, consumer packaged goods, healthcare and pharmaceutical, industrial/manufacturing, technology and public sector research.

The firm offers a number of products and services, including Social Analytics Solutions, a suite of products integrating social media tools with traditional research methodology, including social listening and social communities; MindLink, a new offering developed collaboratively with Buyology Inc., a brand relationship framework that integrates traditional research methodologies with

neuromarketing techniques to deliver insight into the mindset of consumers; CityMARKS, a citizen satisfaction measurement tool for local governments; new product testing; in-home use testing; FDA-related research; claims substantiation; copyright infringement research; a customer equity product for effectively measuring the customer experience and driving market outcomes; and employee engagement survey products for small- to medium-sized organizations.

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

The firm has been a partner of CNN since 2006 on the CNN/ORC International poll, and partners with NYSE Euronext on its annual CEO Report, one of the leading sources of global CEO insight on topics ranging from globalization and governance to strategy and human resources.

ORC has 10 U.S. offices and offices in five countries internationally. The firm employs 444 worldwide.



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MEDIAMETRIE
Mediametrie.com

NAME **Bruno Chetaille, 56**
TITLE **Chairman and managing director**
EDUCATION **M.B.A., HEC Paris**

Mediametrie, in Paris, was founded in 1985 and is a media research company owned by French radio and TV media, advertisers and their advertising agencies.

Revenue in 2010 was \$92.3 million, up 9.4% from 2009. In 2010, revenue generated from work conducted outside France was \$8.5 million, or 9.2% of total revenue.

Mediametrie provides audience measurement services in France, including TV, radio, cinema, Internet and mobile telephone.

The company continues to develop its range of services and is extending its scope by working on new media, telephony, new multimedia practices, cross-media, etc. It offers products designed for specific users and has offerings on the international market regarding consumers' listening and viewing habits.

Bringing together representatives of radio, TV, advertisers, advertising agencies and media brokers contributes to the development of research tools used to measure the emergence of new stations and broadcasters as well as the development of new markets. Among them are:

- Mediametrie//NetRatings offers the Mediametrie//NetRatings Panel and the MegaPanel in France. The M//NR Panel provides agencies, publishers and marketing professionals with Internet audience measurement in France. The MegaPanel offers a panel of Internet surfers, combining surveys of surfers with their Web usage.

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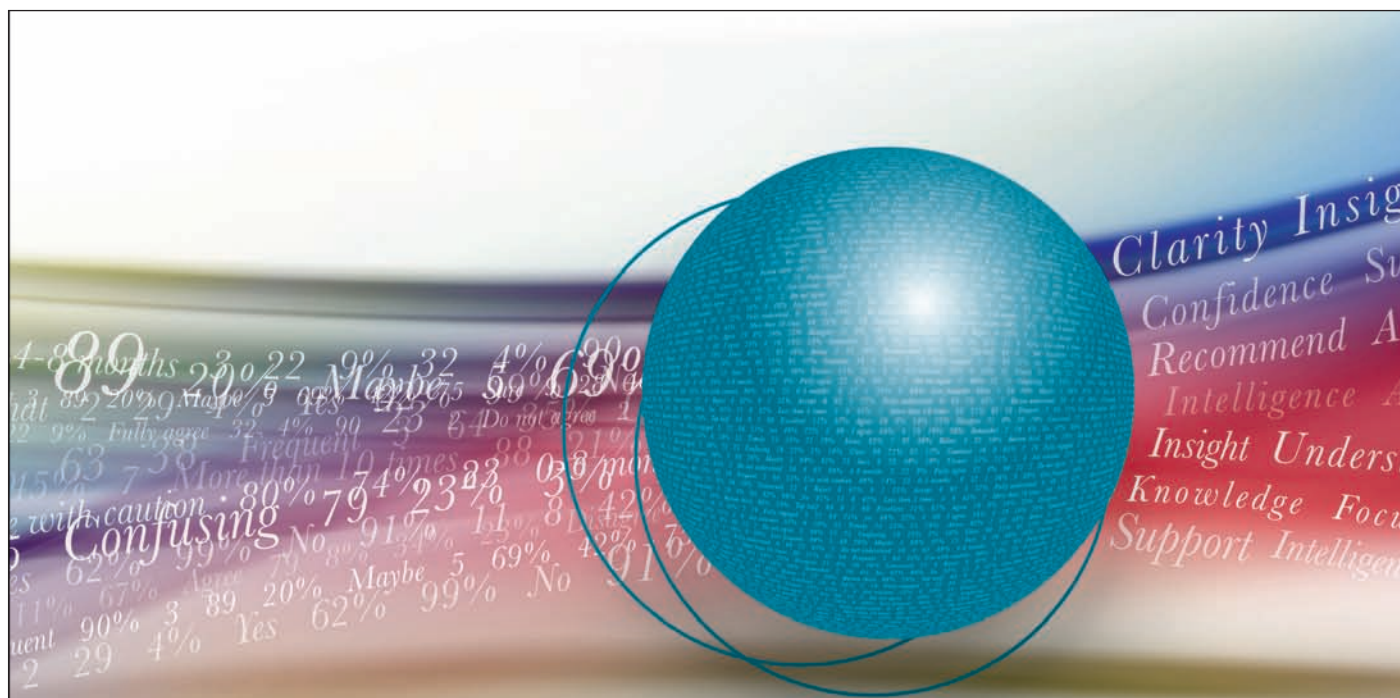
- Mediametrie and eStat, a joint company created in 2003 and since 2008 a 100% Mediametrie subsidiary, provides website traffic measurement in France. It offers a range of site-centric measuring tools: CybereStat, with its Cyber'Streaming, Cyber'Podcast and Cyber'Clics modules; and eStat'Pro, with its eStat'Clics, eStat'Track, eStat'Multicritères and eStat'eCommerce (ROI) options.

- MarketingScan, created in 1993 with GfK SE, provides measurement in three areas: tests under real conditions, measuring the effectiveness of advertising and promotions on sales, and shopper analysis.

- Metric Line, a subsidiary of Mediametrie, specializes in the design and delivery of automatic services to measure TV, interactive services, radio and outdoor advertising audiences, as well as services to track audio-visual content. Metric Line also provides consulting and engineering services in all audience measurement fields, whether automatic or by interviews. The services are offered to all international audio-visual markets.

- Mediametrie and the Netgem Group have jointly developed measurement of the digital TV market, providing information about households that have digital decoders, particularly Netgem terminals. The information, which is collected by feedback from the decoders, complements Mediametrie's TV audience measurement operations.

The firm employs 547 full time.



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CELLO RESEARCH & CONSULTING
CelloGroup.co.uk

NAME **Jane Shirley, 44**
TITLE **CEO**
EDUCATION **M.A., marketing, Newcastle University, United Kingdom**

Cello Research & Consulting, based in London, is the research unit of Cello Group Plc that was founded in 2004. In November 2004, Cello was listed on the AIM section of the London Stock Exchange.

Research-only revenue in 2010 was \$84.5 million, up 4.8% from 2009. In 2010, revenue generated outside the United Kingdom was \$37.2 million, or 44.0% of total revenue. Research and nonresearch revenue for Cello was \$92.4 million and for Cello Group plc was \$193.1 million.

Cello is a global market research and advisory business with a dominant area of focus on healthcare research and qualitative research focused largely on CPG, retail and the branded goods areas.

Nine businesses contribute to market research in Cello:

- Insight Research Group (InsightRG.com) offers marketing research and consultancy in the health-care sector. ISG's research offerings span the product life cycle, with a high proportion of work conducted prelaunch. The business currently works with the majority of the top 10 global pharma organizations. Patient research is one of its key areas of focus with new techniques and methodologies as well as a range of observational techniques, including ethnography.
- RS Consulting Group (RSConsulting.com) provides quantitative and qualitative research services in business services, technology, financial services, logistics and other sectors. Core competencies include telephone and online interviewing on demanding subjects with hard-to-reach respondents or in situations where sample is scarce. Also, market sizing and forecasting make the best use of customer loyalty, satisfaction and advocacy information.

- Leapfrog Research & Planning (LeapfrogResearch.co.uk) provides services in consumer healthcare, retail, media, finance, food and drink, consumer telecoms and the automotive sectors. LR&P uses qualitative research approaches to explore consumer and brand issues, and quantitative research to measure whether clients are meeting their objectives.

- The Value Engineers (TheValueEngineers.com) is a strategic brand consultancy with the purpose of value creation through brands and branding in the food and drink, personal and household, financial services, telecoms, and travel and leisure sectors.

TVE has developed a number of key processes and tools to handle the most common business and brand issues, offering consulting services in branding, innovation, strategy, consumer understanding and marketing capabilities.

- Cello mruk Research (Mruk.co.uk) is a full-service market research firm working across the United Kingdom via a network of regionally based offices. The business operates mainly in the public sector (local authorities, central and regional government agencies, police forces, social housing landlords, utilities, community regeneration agencies and public transport bodies), but also with organizations in the private and not-for-profit sectors.

Core competencies include attitudes and usage research, public attitudes and consultation, service satisfaction, communications and marketing.

- Rosenblatt (Rosenblatt.co.uk) is a qualitative research agency specializing in the broadcast media and communications, CPG, leisure, education, social research, automotive and charity sectors. It is experienced in strategic development, encompassing new concept and product development, branding and communications.
- 2CV (2cv.co.uk) is a multidisciplinary team specializing in new product development, and brand and communications research using traditional and new media marketing and research methodologies to understand the decision-making process in the diversifying media landscape. It has the ability to provide consumer-led context for emerging media trends and to evaluate interactive media, understanding how consumers process messages, regardless of the medium.
- Leithal Thinking (Leith.co.uk), based in Scotland, is a brand and planning consultancy that provides insights and services relating to communications strategy, brand design, qualitative research, workshops and other forms of marketing support.
- Face (FaceGroup.co.uk) uses co-creation to enable the direct and active involvement of consumers with brands to deliver a range of insight, strategy, innovation and planning objectives. It has three dedicated teams of planners, researchers and social media specialists based in its London office.

Cello employs 353 in research worldwide.



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MARKET STRATEGIES INTERNATIONAL
MarketStrategies.com

NAME **Andrew J. Morrison, 62**
TITLE **Chairman and CEO**
EDUCATION **Ph.D., mass communications research, University of Michigan**

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

Revenue in 2010 was \$80.7 million, up 1.7% from 2009. Revenue generated outside the United States in 2009 was \$13.1 million, or 16.2% of total revenue. The



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growth rate excludes 2009 revenue from the sale of the Perception Analyzer unit in December 2009.

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

Its professionals are focused on their respective vertical industry segments and geographic markets. Market Strategies' specialties include customer experience management to set priorities for service improvement initiatives and employee training; product development and optimization to develop, launch and maintain winning products and services; segmentation to create clear and identifiable consumer segments; messaging and communications testing to develop effective communications programs; brand development and positioning to leverage customer needs and create a framework for managing brand perceptions; and social media research to leverage the information customers initiate and share online.

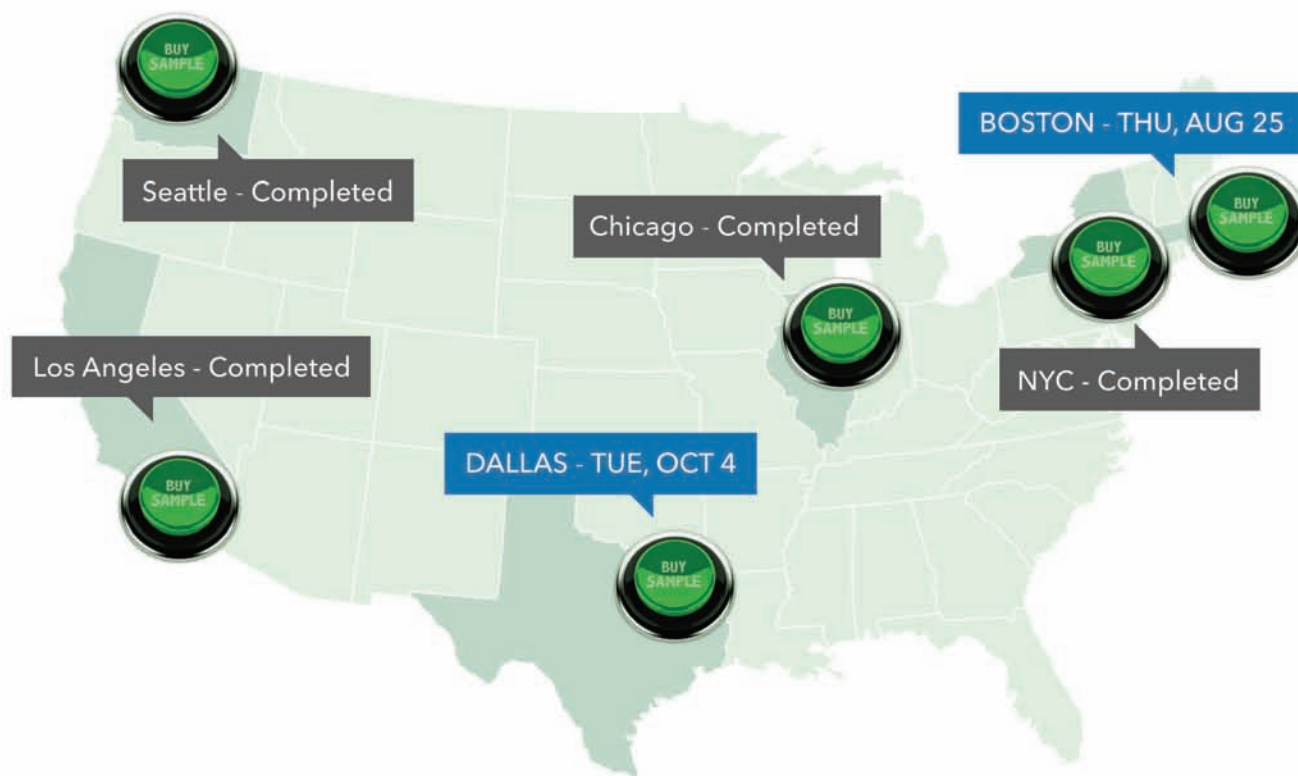
Market Strategies provides clients with customer satisfaction and loyalty research through its Integrated Research Center (IRC) service. These dedicated research centers are effective for clients that conduct more than 5,000 interviews per month via telephone, IVR or Internet-based data collection. The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

In 2010, Market Strategies completed approximately 1.2 million telephone interviews from its research centers in the United States and Canada. The firm also managed more than 300,000 Web-based interviews, with an emphasis on physician, technology, decision-makers and business leader panels. It manages all of its telephone and Web-based research, and its focus group moderators and in-depth interview specialists conducted qualitative research in more than 30 countries.

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

Market Strategies employs 257 full-time staff and 1,100 interviewers, and conducts research in 75 countries across eight global regions. The firm has regional offices in six U.S. cities, Canada and Hong Kong. **ms**

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