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MRA

Alert! Magazine

Research In The World's Largest Market

SPECIAL EXPANDED ISSUE

Contents

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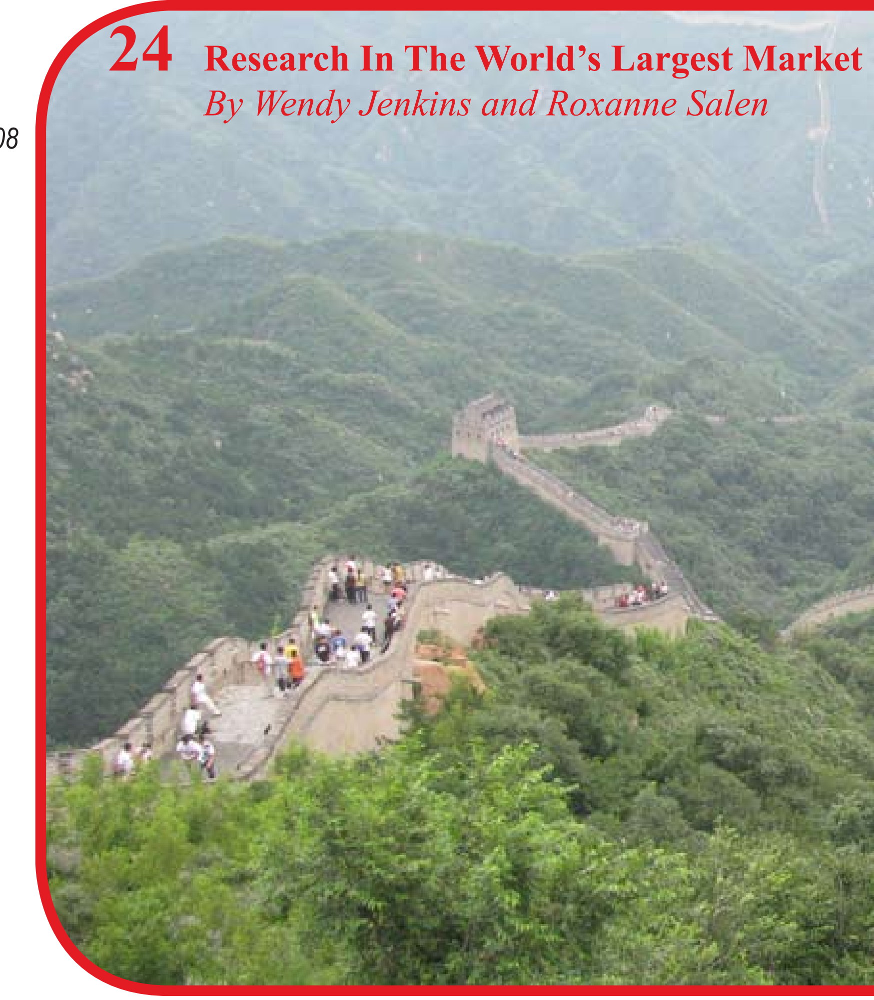

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From The Editor

Get Up And Go!

Hopping onto a plane bound for the French Riviera with nothing but a toothbrush is not very realistic for most of us. In fact, jet-setting abroad is not realistic for many Americans. According to travel guide publisher, the Lonely Planet, only about a quarter of Americans have a passport.

This is both shocking and dissapointing; there is an entire world out there, for you to explore, taste and learn from. Not just from a tourist's perspective, but also from a business professional's.

Marketing researchers have a passion for learning about people and exploring the opinions of others. There is a whole world of people with views, thoughts and opinions who are willing to share.

In this issue you will be able to learn about European phone penetration, research in Russia, women in Afghanistan and even cultural faux pas. Hopefully you took a summer vacation, if not, perhaps this issue will suffice.

I would also like to take time to welcome our 18 new members!

> "The world is a book, and those who do not travel only read one page."
>
> -St. Augustine

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Mumbai, I Think That's In India!

Considerations When Going International

By Richard Cowland, Field Facts Worldwide

An e-mail was received from an anxious client. "Please, can you prepare a quotation for me? It's for Mumbai. I think that is in India! I need it tomorrow!"

Now India is a large country. It lies between the Arabian Sea and the Bay of Bengal; it has a population of over one billion, with over 4,000 miles of coastline. It is a power-house economy. It's far from insignificant.

The client thought that they had presented us with a flat-tired bicycle and an instruction to ascend Mount Everest at speed. Tomorrow was no problem, and we knew where Mumbai was. Such a geographical knowledge gap is sometimes a metaphor for something more inherent; often a poor appreciation of the challenges and risks of working internationally.

The truth is, for some the idea of moving a project across international borders is increasingly straightforward. Sure we have increased accessibility to overseas markets, and we have an assumption that the entire world speaks the same language. We can thank the Internet and the education system for that. However, in order to succeed overseas one needs to look at things in greater detail, even considering matters seemingly irrelevant at home. Working internationally is inherently testing; and not simply because of those historic challenges of language and culture.

Globalization may now have reached an impasse. Products and services do not necessarily translate from one place to another so fluidly. More and more, markets are reasserting their individuality; their identity; their lifestyle. In market research terms this may translate into using a more appropriate methodology in one country, compared to another. This may mean an absolute refusal to even consider a methodology, even at the expense of winning a project. It may even mean the dilution of a project downstream so that it's managed in a local rather than remote way. It may mean heavily biased and skewed results as a result of everything other than the method. Ultimately, it may even mean that a product or service is not transferable across borders.

Furthermore, it is often the case that the real essence and purpose of the research is also lost. It becomes a rather mechanical exercise driven by price, and perceived as a commodity that can

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Celebrating Who We Are

For those of you who listened to my remarks at MRA's Annual Conference in New York, this past June, it's no surprise that I may be one of our association's and our profession's biggest cheerleaders. But my declarations are not without provocation. I vividly remember one of the first national board meetings that I attended, while chair of our professional development council. I was still relatively new to MRA, and during one discussion, was caught somewhat off guard by what struck me as almost a defeatist attitude.

It irks me to see passive and subservient approach that many of us bring to our roles. If the old adage that knowledge is power still rings true, it makes no sense that a profession which oversees the direct dialogue with customers, doesn't have a larger voice in decision making, and often lacks that proverbial seat at the table. We need to leverage that position we enjoy at the epicenter of turning critical business information into strategy to better our careers and our ability to make a difference in what we do everyday.

I don't believe that this perspective is delusional or arrogant. Rather, I feel that as one who has observed marketing research as both practitioner and End User, we often find ourselves so immersed in the nuance of our craft that we fail to use that craft in ways that make us more indispensable to our clients, whether they are internal or external. Let's face it, most sales and marketing people and many senior management folks are often petrified by numbers and secretly intimidated by research. These colleagues gritted their teeth through the obligatory statistics classes in school, and they probably shudder just as much at the "soft" sciences like social anthropology and consumer behavior. They are immersed in the creative flair of their advertising or their promotional plans. When a "researcher" walks in the door, there's often a hesitancy and fear that they will be overwhelmed with all of that "nerdy stuff."

I can make these assertions, because in many ways, I've lived it. In my first marketing job, I embraced the opportunity to also take on the research role, because I saw that no one else wanted to deal with it. Yet, the more I learned about research, the more I saw its strength as a means to support and to tell a marketing story, and more importantly as a way in which I could engage my senior management in a thoughtful dialogue that actually taught them something they didn't know about their business or the competitive environment. It begat a seat at the table, because for those who wanted to seem in control of those numbers, but still didn't have the time or inclination to be immersed in it, I became an important ally that provided a consultative look at reality, and then simultaneously stripped out the intimidating parts so research could be understandable and have utility as a "story telling" tool to help them look good. This led to increased reliance on research as both strategic and marketing tools, and before long others embraced the power of marketing research and our perspective was invited into the mainstream of business management discussions.

I still don't hear enough stories like this, and it puzzles me. What we do on a daily basis as marketing researchers isn't really rocket science, but for many outside our world, it appears to be. And that, I maintain can continue to be a way in which we can gain a more powerful role with those that we work for. I'm not suggesting we do this just for power's sake, but because I truly believe that what we uncover, when we do our work well, and allow ourselves to move away from the Greek notation and put our learnings into succinct and actionable conclusions, marketing research really does drive business decision making…and frankly, it should!

This is my perspective, if you would like to comment, please visit my blog on the MRA Web site.

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Chief Executive Column

Go Global Young Man!

While the research profession is not the largest profession in the world, it has transgressed more borders and cultures than some larger (gross earning) industries. The reason for the ease of globalization for the research profession is quite simple. Information yesterday, today and tomorrow has value. Almost any business, political mistake or bad decision made over the past decade can be attributed to bad information or bad use of information.

This issue of *Alert!* is focused on international research. Because of the value of information the research industry provides and the focus of this month's contributors on the proper performance of international research, I would like our members to look at another part of international research, the business aspect. Equally important to performing good research is conducting solid business that accounts for the business performance or expectations of different global regions.

There are many successful multi-national research firms. I would suggest these companies do five things well:

1.) They avoid ethnocentric approaches to human resources.

2.) They invest in learning accounting and financial idiosyncrasies of the countries they conduct business in.

3.) They learn the business rhythms in the countries that they work in.

4.) They educate staff as to the universal elements of their business model.

5.) They recognize the local nuances of the business culture they need to adopt.

1.) There are many expressions in various languages that at their essence mean that all people are alike. While at its core this is true, because of phase of development or cultural preferences in different nations, how we interact with each other in the work place can be very different. A classic example of this is the ISO system. Many of the United States members in previous organizations I represented, decided not to adopt ISO standards. Their reason for this is that, ISO standards were generated to overcome labor and human resource performance differences between the nations of the European Union. When doing business in Europe the members would review these standards, but never applied them in the U.S. The reason for this is that human resource standards have Federal Standards set by our national government and State standards set by each state. Between these two sources of guidance and the great deal of money spent in the U.S. on human resource management, the redundancies and costs of ISO don't make sense.

But in the EU, with varying labor laws from nation to nation and different cultural approaches to the work place; ISO provides a modicum of assurance in procedural performance.

2.) A German professor taught me what he thought were the universal truths of accounting (GAAP: Generally Accepted Accounting Principals), he also showed me some of the unique elements of corporate accounting in Germany. I would never have thought to consider some of these things. A company going international will reach out to recognized financial and accounting people in each country to better understand the nuances, which could lead to significant financial changes.

3.) I have done business in various states of the U.S. and with a few minor exceptions the rhythm of business is the same. We do however see variance in speed or timing of business between industries and companies. When entering business in a new country you need to assess the cultural differences in approach to business and assess how your operation is in relation to the pace and expectations of other businesses that you respect.

4.) Outsourcing to India and China has become prevalent in our industry and others. One of the traits that I have observed about organizations that have done outsourcing well, is the organization's desire to educate the staff in all countries as to the universal nature of the company's business elements. This process points out some of the differences that exists culturally at the company, but more importantly it instills a core belief system or culture that transcends the differences.

5.) Finally, corporations must identify with local cultural nuances they need to adopt in order to allow their staff to feel comfortable at work. A good example of this is the traditional business pop-in that occurs in New York. A client is down the street and you decide to pop-in and ask them to lunch or just take a moment to communicate. Taking a New York manager who likes to utilize this tactic and placing him or her in charge of operations in Argentina, where prior appointments are always necessary, could lead to a decline in business. That is why it is important to find a culturally astute person for operations in new countries.

Competition today is greater than ever so be sure you consider these factors when expanding into new countries.

To respond to this article, e-mail Lawrence Brownell at executivecolumn@mra-net.org.

[This article is going to be in Spanish on our Web site along with a guide to international business etiquette.]

September To-Do List...

☐ Register For MRA's Fall Conference & RIF 2008
November 3-5th
JW Marriott Las Vegas Resort & Spa, Summerlin
Register Now! www.mra-net.org/conferences/FC_08/

☐ Register for the Web Seminar: Building Panels from your Online Communities
Presenter: Dean Wiltse, Vovici
When: Wednesday, October 8 at Noon – 1:00 p.m. EDT
PRC: 1 Contact hour in Research Category- Analysis Skills & Techniques
Register Now at www.mra-net.org

☐ Register for the Web Seminar: Pharmaceutical Market Research from a Quantitative Perspective: Practicalities and Pitfalls
Presenter: Janna Walsh, Adelphi Research by Design
When: Wednesday, October 29 at Noon - 1:00 p.m. EDT
PRC:1 Contact Hour in Research Category- Quantitative Research Techniques
Register Now at www.mra-net.org

☐ Rate the last company you worked with on EEP at http://www.mra-net.org/eep/login.cfm?type=login

☐ List in the 2009 Blue Book at www.bluebook.org.

Marketing Research Association

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be exported across borders without condition. This is not a result of poor translation, but reflects a more engrained and absolute difference in how we conceive, prepare and execute a project in one market and then try to export it en masse to another. It is often necessary to reinvent assumptions so as to correct this imbalance.

Moreover, whilst the suppliers and researchers might speak your language, the respondents seldom do. You always have to be mindful of this void when looking internationally. Also keep in mind that telephone interviews may work in London, but not in Tokyo. When we conduct research in London, many of the U.S. based clients choose to moderate a focus group themselves because of a perception that with no language barrier the process is simple. While this is fine for most sessions, it must be remembered that even the sound of American in a focus group could have an inherent affect on its outcome. The same applies should a client pursue the option of using a multi-lingual moderator across many markets. In this example the saving in terms of time is obvious, but let us not forget how the use of such a technique might be perceived by the respondent.

It is important to look at the larger picture. And for that the services of a partner with local knowledge is often the solution. But more importantly it is a need to look closely at the real essence of the research, its core objectives and how these relate to the respondents abroad. Without such an examination, one might as well shift the research results, and the subsequent marketing activity, from one place to another without any consideration of what lies undiscovered abroad.

Richard Cowland is the Marketing Manager at Field Facts Worldwide. He can be reached at richard@fieldfacts.com.

Living Female in Afghanistan

By Karl Feld, Veronica Gardner, D3 Systems; Sweeta Hashima, ASCOR Surveys

[*Editors Note: To view the figures discussed in this article, please visit www.mra-net.org/publications/brands.cfm*]

Survey research plays an important role in providing Muslim women with a public voice where custom and culture do not permit them their own. As you'll discover in this article, survey research can be used to inform and shape empowerment policies from the perspective of each population.

The Women In Muslim Countries (WIMC) study measures women's empowerment in actual daily practice, providing a deep look into the oft-perceived gap between current public policy and empowerment initiatives and actual practice on the personal and local level. The answers yield a metric for promoting excellence in public policy by informing policymakers on women's attitudes about the affects of policy initiatives, as well as a measure of the degree of effectiveness of those policies.

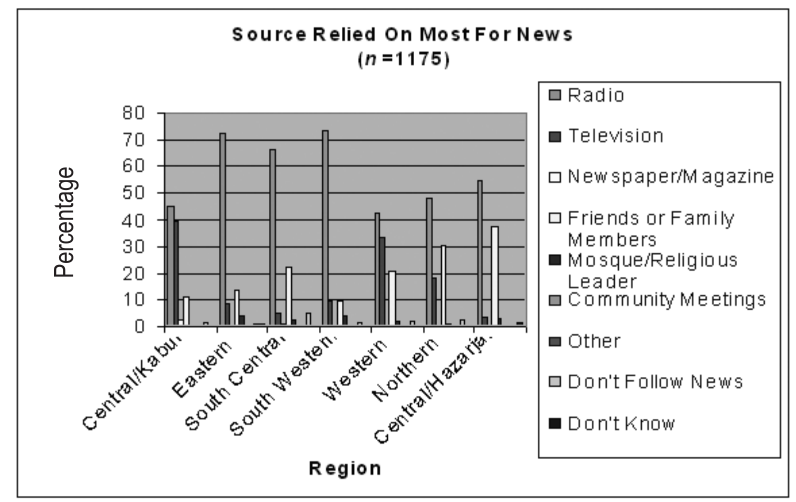
Afghanistan is perhaps one of the most extreme cases of a country where custom and culture do not permit women a public voice, beginning with interviewing for the survey itself. Interviewing women in Afghanistan is limited to other women accompanied by a male escort. In some places it is restricted to daylight hours in proper attire. Though burdensome, the advantage to this approach is that it eliminates hesitation on the part of the interviewee to share her thoughts.

The WIMC survey covers many women's issues in Afghanistan. One of the topics is women's voting behavior in the last elections. The data indicates that slightly more than half of women exercise their right to vote. This suggests that helping women understand their status through survey data might inform an active political involvement in creating change. Majorities voted in most provinces, with the exceptions of the South Western and Western regions. The data also indicates the women with lower incomes participate more in voting than do women with higher incomes.

Women who voted were also more likely to be older and more educated, use the radio as their primary source for news and were more likely to make purchasing decisions for their household needs over their spouse, compared to women who did not vote. Figure 1 on MRA's Web site (see page 14 for URL).

Women in Afghanistan also seek news. Overall, 56% of women in Afghanistan listen to the radio for news, suggesting that a majority are interested in learning more about events outside the home. In some regions, however, such as the Eastern and South Western regions, more than 70% of women listen to the radio for news. Women who rely primarily on radio for news are more likely to be younger, homemakers, have lower income and live in rural areas compared to women who rely on other sources for news.

Women in Afghanistan have limited options to become informed of national and international events. As most do not work and have little education, they are not well informed about the issues outside their homes. The lack of electricity in the country conspires to limit access to television news. The best option for an Afghan woman to get news about the outside world while at home is radio. It is also the best avenue for reaching them with survey results.



CEDAW Rights

Although Afghanistan has signed the Convention on the Elimination of Discrimination Against Women (CEDAW), the exercise of women's rights guaranteed under the CEDAW has been an issue in the country. Today there are differences in opinion among women with different incomes and education about the role of shari'a in women's rights and the status of healthcare, media usage, work status and purchase decisions. These factors also differ across the various regions and ethnicities.

Women have long been faced with healthcare challenges in Afghanistan. According to the survey, one in three women believe they have been denied healthcare due to their gender at some time in their lives. The proportion differs slightly by region of the country. Women in the Western, South Western and Central/Hazarjat regions report this problem more often than women in other provinces. Figure 3 on MRA's Web site (see page 14 for URL).

Seventy-eight percent of Afghan women are homemakers and another 10% are unemployed. One of the reasons for unemployment is a lack of education. The other is family restrictions. Many families in rural areas do not let their daughters go to school or work outside of the home. Although 40% of Afghan women are interested in working, 27% of Afghan women report wanting to work if provided the opportunity, but being prevented by other circumstances in their lives.

Approximately 36% of women who are not working are interested in starting a business. Afghan women who were interested were

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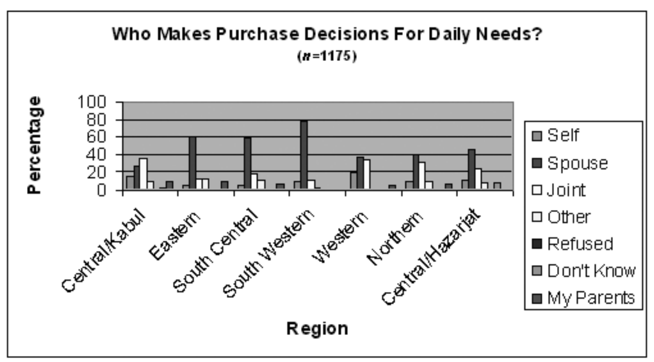
more likely to be younger and to make the purchase decisions for their household needs (over their spouse), compared to women who were not interested in a startup business. These women were also more likely to vote and less likely to feel they were denied healthcare.

Afghan women in the Eastern and South Central regions of the country are also more interested and able to take part in a startup business than those in other regions. Figure 4 on MRA's Web site (see page 14 for URL).

Eleven percent of women in Afghanistan unilaterally make purchase decisions for daily household needs in their lives. Almost half of Afghan women reported that their spouse makes the purchase decisions and over a quarter reported joint-decision making. Women who reported their spouse makes the purchase decisions were more likely to be from rural areas, homemakers and were less educated than women who reported they were the purchase decision-makers.

In some regions – for example, in the Eastern, South Central, and South Western regions – decision-making by the male spouse is dominant.



Despite these challenges, the majority of women in Afghanistan do not see shari'a law as inconsistent with protecting or advancing their CEDAW rights. To the contrary, with the exception of Central/Hazarjat, majorities believe shari'a law can to some degree protect their rights. This suggests that to be effective, the advancement of CEDAW-protected rights inside Afghanistan must address consistencies with shari'a law, rather than opposing it outright. Figure 6 on MRA's Web site (see page 14 for URL).

CEDAW-protected rights are realized variably by women throughout Afghanistan. However, the survey results suggest that the basic conditions for advancing them may exist within the society. A significant percentage of Afghan women are news-seeking voters interested in income opportunities who believe their rights can be protected under shari'a. Efforts to advance their condition can build on these survey findings.

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Photos courtesy of D3 Systems

Telephone Research Across The Pond

By Valerie Jenkins and Linda Piekarski, Survey Sampling International

European* researchers are much more likely to routinely include mobile numbers in their sampling frames than their U.S. counterparts because mobile telephoning there has evolved faster and further than in the U.S. This need to include mobile numbers challenges the traditional fixed line sampling frames, which are becoming increasingly less representative of the general adult population.

Current European Telephone Landscape

Telephone access of some sort is almost universal at 94 – 100%, but mobile penetration rates are generally higher than those for fixed line.

Across Europe, most households have both fixed and mobile access, but there is significant variation among countries. Sweden, the Netherlands and Luxembourg have the highest rates, while in Finland the majority rely on mobile access only. These differences are probably due to different calling plans and rates, as plans evolve to meet subscribers' demands, other countries are likely to catch up and the majority switch to mobile phones.

Fixed line only households are relatively low and decreasing in number, but still significant in some countries, notably Germany 22%, France 18% and Austria 17%. These households are more likely to be made up of single persons aged 60+ whose main reason for not switching is "no perceived need." As the younger baby boomers age, they're likely to bring their dependence on and comfort with technology with them, dramatically changing this landscape feature.

Mobile only households, 22% across Europe, are much more likely to be younger, single person households. 51% are single householders under 29 years, and the younger the householder the more likely they are to have mobile only access. This poses significant representation and sampling challenges, particularly in the seven countries with rates over 18%.

Some of these challenges are generally similar to those in the U.S., while others are unique to the European mobile landscape.

Methodologically, mobile phone use has disrupted traditional RDD sampling frames, requiring researchers and sample providers to devise population frames rather than the traditional household frames.

The sample frame design will vary from country to country. For example, Finland can capture fixed and mobile numbers selected from a national registry of numbers while most other countries can not. Not surprisingly, Finland has been conducting mobile phone or mixed mobile/fixed line research longer than most other countries. Most European mobile numbers are simply country specific and tend to be less closely linked to geography than fixed lines, so samples will be more likely to include respondents outside smaller target geographies.

Fielding challenges include dialing to mobile regulations; an interviewer must be available when a respondent answers or calls back. They must establish that the respondent is in a "suitable place" to answer the survey as most countries restrict driving while talking on the phone. There is a potential for lower response rates as caller ID is very effective for screening calls; a large number of users occasionally don't answer unrecognized callers.

Different rates and subscriber plans within and among countries will impact field costs. Roaming charges, included in most plans, may increase the number of partial interviews and break offs and some countries also impose higher rates for fixed to mobile calls, than for fixed to fixed. However, billing systems that provide free incoming minutes may lift response rates as there is no cost to taking the call.

Survey designs that include newer modes of survey administration (SMS / mobile sample frame only) must factor in unequal probability to account for reaching single user phone or a household phone that is accessible to all household members, whether the mobile is a business or personal device.

The uniform adoption of GSM technology and freely available and convenient subscriber identification modules (SIM cards) has contributed in some instances to frame over coverage – the number of mobile phone subscribers may exceed the size of the target population, biasing estimates. SIM card substitution also complicates geography further, for example an Italian

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number may actually be "assigned" to a U.K. mobile subscriber for occasional use while traveling.

The traditional final sample disposition can't be overlaid as is onto mobile phone samples. Voice intercept messages are ambiguous; it's impossible to determine whether a phone is switched off, and a sizeable proportion of subscribers do switch off their phones for long periods of time, are out of range or out of service. The AAPOR fixed line standards will need to be modified, adapted and validated.

Some Differences Make It Easier Than In The U.S. To Include Mobile Segments

The European numbering system uses unique, easy to identify prefixes that are distinct from landline prefixes.

Most mobile plans bundle text (SMS) services, which are much more enthusiastically used than in the U.S., providing a familiar contact mode to pre-notify subscribers about potential surveys. Preliminary research indicates that European respondents are far more open to receiving marketing texts than their U.S. counterparts, as high as 76% according to some research, so it's reasonable to expect that they'd also be more receptive to research surveys, particularly if media rich and appropriate for the medium.

Looking To The future – It's Already Here

On the plus side, mobile sampling offers the possibility of more engaging survey material using pictures, videos and the Web. This may help to increase representation of the elusive young, single demographic in sample frames.

On the negative side, evolving technologies and rate plans will further obscure geography and complicate probability estimates. Prepaid calling plans where numbers are replaced on expiry are widely used, particularly among the young and single.

VOIP 13% of users with home Internet access use this technology, although generally as part of overall telephone usage, rather than sole telephone access.

Mobile operators are involved with developing technology that unites a single GPRS handset with a Bluetooth device that ships IP calls over an ADSL line, serving as a fixed line at the home (office) base, switching to a mobile when out and about. Will these be considered fixed or mobile numbers? Billing and customer care are becoming increasingly unified, blurring the current fixed line v mobile distinctions. Such a system has already launched in the U.K.; France and the Netherlands are actively developing comparable systems.

"The European numbering system uses unique, easy to identify prefixes that are distinct from landline prefixes."

Conclusion

Telephone sampling will never be the same again; posing many challenges for survey design and data collection, but given the evolving technology there's no reason for the practice or the surveys to be dull.

**For purposes of this overview, Europe is defined as Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden and the UK.*

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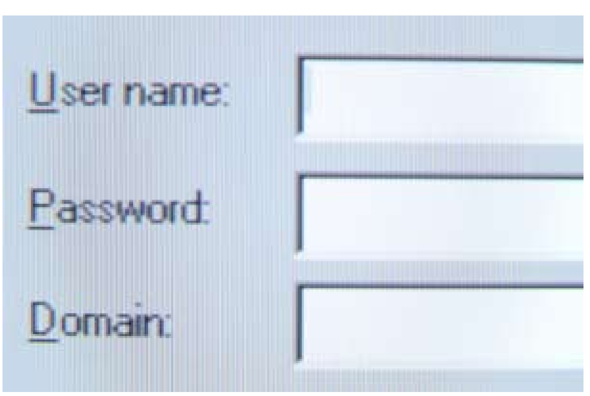
Some Things Considered:
Conducting International Research Online

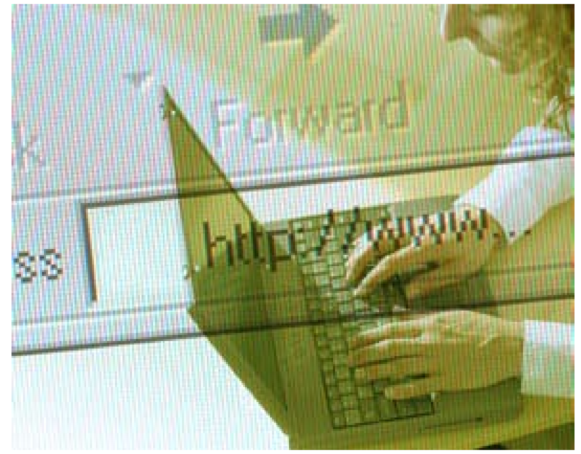
By Tobin Bailey, Research Now

Conducting international research online can cause fear in some and smiles for others. For those who are End Users of such research, it can bring smiles and fear, smiles when they work with a partner that is culturally aware and fear when they realize, to the detriment of data quality, you can't force all countries into a domestic only research process. While online access panels have made conducting multi-national research easier, there are many pitfalls that, if not considered, can not only lead to poor quality research, but the inadvertent offending of respondents or even legal action. While not all encompassing, there are a few factors that should be considered before conducting an international online research program.

There are many questions to answer before launching into a multinational online research project. The first would be: is online the appropriate methodology to reach your target? Increasingly, many online providers are now finding themselves in the position of having to explain why online is not the best methodology to use for certain studies in a given market and why it is a perfectly acceptable methodology in another. The benefit of this new argument is that any international research provider worth his salt is more than happy to explain the reasons why it is not a good idea to conduct an online study among 8,000 C-Level execs of companies with €300 million or more yearly revenue in Lichtenstein and expect to have valid data. Unfortunately, there are those unscrupulous few that will sell you on the benefits and feasibility of conducting this project online.



How do you assess whether or not online is the appropriate methodology for a given market? There are several aspects that need to be considered when answering this question. One should focus on the relationship between the Internet penetration (and infrastructure) and the associated demographics versus the demographics of that market as a whole versus the target you are trying to reach for a given study. Keep in mind that Internet penetration is low in China (16%) but that number represents 162 million Internet users, according to China's Internet Network Information Centre (CNNIC). The figures in relation to how well your sample source will represent a broad cross-section of a given market will determine the viability of a given study.



Once it has been determined that an online methodology is appropriate for a given topic and market, the development of the survey tool can begin. When conducting multinational online research, it is necessary to understand market variances across several social and economic factors. This step is particularly important if your objective involves data comparisons across the different countries in your study. Development of income brackets or socioeconomic grades across the countries can be done in several different ways, including looking at the purchasing power of local currencies versus the dollar, social grading or by looking at the occupational function of the household's main wage earner. Educational classifications should also be reviewed and/or standardized to ensure appropriate classifications are used. Developing these scales for your survey in a consistent, but localized, manner across all markets will allow you to more accurately sample for comparison purposes.

Local laws will also impact the way in which you sample and conduct your study. Assume you are conducting an ad test for an alcoholic beverage. To successfully field this study across several countries (without getting yourself or your company into legal problems) you will need to know the legal age for alcohol consumption in each country you would like to sample. If this project study also involved an in-home usage or taste test, you will also need to be aware of all applicable laws pertaining to the shipment of the necessary product sample. These laws can be very complex and can vary not only by country but by local ordinance as well. It is a good idea to choose a vendor that can provide you with information regarding local laws. Social attitudes towards survey topic should also be taken into consideration when conducting International research. Researching sensitive topics such as religion, politics or sexual values may have reduced participation rates that will require heavier than normal sampling and/or extended field time to overcome the lower completion rates inherent to surveying sensitive topics.

One must respect the importance of language in different cultures by conducting interviews in the local language or languages. Linguists estimate that there are between 4,000 and 10,000 or more distinct languages spoken across the globe (www.ethnologue.com). It is best to have study materials translated by native speakers of the language, or languages, for each market in which you will be conducting the research to maximize data accuracy and minimize misinterpretations. Items that need to be translated go beyond just the questionnaire and should include all survey platform error messages and any stimuli used within the survey as well as the back-translation of any open end data. It is also important to note that there are regional variances within a given language. As an example, Spanish spoken in Spain can be very different that Spanish spoken in Mexico or Argentina. This means that materials not only need to be translated, but also need to be localized with respect to syntax and word usage. The extra cost to use native speakers to translate and review the materials will save you time and money in the long run by ensuring the most accurate interpretations of the survey tool.

Of course, this is not an all-inclusive list of factors that need to be considered before conducting a multi-national research study. Understanding and respecting cultural differences early in the research process will help you minimize fielding problems while contributing to data quality.

Tobin Bailey is the Vice President of Client Development at Research Now. He can be reached at tbailey@researchnow-usa.com.

Research In The World's Largest Market

By Wendy Jenkins and Roxanne Salen, The Praxi Group

China is BIG in every sense of the word; the population, the ethnic diversity, and the geographic distribution.

China is currently receiving much publicity based on a number of factors, including the summer 2008 Olympics, recent natural tragedies and sheer population figures.

Background

Since the introduction of Deng Xiaoping's economic reforms to China in 1978, foreign direct investment (FDI) has poured into the new Chinese appendage of the global economy, and China's domestic market has strengthened; lifting millions out of dire poverty. With annual GDP growth hovering around 10%, the "Middle Kingdom," as China is called in her native tongue, has achieved industrialization and concomitant fiscal growth at a rate unmatched by any other country at any other time in the history of civilization.

Considering the world-wide proliferation of "Made in China" tags, it may be time to focus less on what China can manufacture cheaply for the rest of the world, and rather pay attention to the millions of Chinese customers interested in purchasing items such as home appliances, personal vehicles and global name brands. The World Bank has heralded that the Chinese economy may overtake the U.S. economy in as little as 10 years, suggesting that the time is ripe to tap into the China market. To conduct successful market research in today's changing China, certain trends should be noted, target groups understood (both culturally and geographically) and some practical tips should be heeded to produce reliable results from what is the world's most vast and diverse market.

(Continued on page 32)

10 Steps To Mastering Worldwide Online Research With Physicians

By Jerry Arbittier and Tony Burke
All Global

The road to conducting international research studies can be exciting, bumpy and full of surprises. Before you embark, make sure you prepare well for the challenges ahead.

In addition to preparing yourself, you must prepare your client. Many clients have never performed an international online study… let alone one with physicians. These studies are very different from domestic consumer online studies and therefore you need to manage expectations.

This article provides you a road map to help you master the art of global online research with physicians. Along the way, you will discover ten steps to navigate common roadblocks and successfully reach your destination – on time and headache-free – with compliments from your client.

1. Know Your Effective Sample Size

An essential parameter in performing global physician studies is determining the effective sample size that you can obtain. In comparison to consumer studies, physician universe sizes are small. Therefore, if you or your client typically performs large consumer studies, realize that physician sample sizes are much smaller.

To determine the actual number of physicians you can obtain from the panel, first you need to know the universe size – the actual number of physicians in your clinical category – in each country. In the U.S., there are more than 10,000 oncologists, while in Sweden, there are only 255. So while you can expect to get more than 150 oncologists to do a study in the U.S., it is unreasonable to expect more than a tiny sample in Sweden. Be sure to clarify that with your client in the bidding stage. Sometimes the obvious is not so obvious to a client or statistician analyzing the results, who may persist in demanding the same sample size in each country.

In addition to the universe size, as seen in Box A, response rate drives the effective sample size. Response rate is the percentage of the panel that will actually start your study after receiving your e-mail invitation.

Unlike incidence rates, which you can change by revising screening questions, response rate is determined by the quality of the panel.

As seen in Box A, a change in response rate from 25% to 5% led to an effective sample size drop from 80 to 16. Poor quality panels can have response rates that are even lower than 5%. To guarantee that you do not end up with a very small sample size, you need to get response rate information from your panel provider.

While not directly related to effective sample sizes, there is another important piece of information worth noting about universe sizes. Universe sizes can actually provide information that guides you to choose properly the correct specialty for your study.

For example, Germany has about 28% of the population of the U.S., but only 6% of the number of endocrinologists. Why do they have such a low relative percentage of endocrinologists? The answer is that certain therapies typically treated by endocrinologists in the U.S. are treated by other specialties in Germany. Therefore, if you are surveying endocrinologists in the U.S., you will need to look at different specialties in Germany to get your effective sample size.

BOX A

Formula For An Effective Sample:

UNIVERSE SIZE:	4,000	
Panel Size:	10% of Universe	
x STUDY INCIDENCE		80%
x RESPONSE RATE		25%
= EFFECTIVE SAMPLE		80

Response rates drive effective samples. In this example, if the response rate was 5%, your effective sample would be 16.

2. Carefully Choose Your Panel Supplier

When your client looks at the data and it is inconsistent with their expectations, they may question the integrity of the sample. Therefore, you need to select a legitimate, reliable panel provider. Investigate firms by asking the right questions and doing some research.

Here are a few basics:

– How do they recruit panelists? Do they use physician lists or does a person join the panel and then indicate they are a physician?

– How do they validate that the panel member is actually a physician? Do they check against known physician lists, hospital lists or state registration Web sites?

– Do they use their own sample to complete the entire study or supplement their sample from outside sources? If they use physicians from other companies, how do they eliminate duplicates? Physician sample sizes are much smaller than consumer samples and therefore, if supplemental panels are used, there could be much more duplication than in consumer studies.

Remember, it is not the size of the panel, but the number of respondents that can deliver for your sample that really matters. Ask how many physicians they can actually deliver. How knowledgeable are they about the therapy, treatment practice, legal and cultural differences in the countries you are surveying? Ask if they have conducted surveys in the countries you are studying and what they know about each country's healthcare practices. Make sure they are well qualified to manage country differences.

3. Establish Central Control

Streamlined central control allows you to achieve better, more efficient sample management, as well as consistent programming and data mapping. This leads to higher response rates, easier data reporting and better quality control. Having a single contact at your client company and at your data supplier, a single place to send the survey, and one set of uniform standards to guide your multi-country study will yield the highest quality results.

4. Think Local: Healthcare Practices

Before you begin your study, be sure to have a good understanding of the therapy area and differences in treatment practices in each country. Healthcare systems, treatment practices, brand names, laws for data collection and interview targets may vary from country to country. Your panel provider should be a good source of

(Continued on page 39)

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- Plaza Research - Phoenix
- Schlesinger Associates - Phoenix

Scottsdale
- Fieldwork Phoenix, Inc. - Scottsdale
- Focus Market Research, Inc. - GroupNet™

CALIFORNIA (Northern)

Fremont
- Nichols Research, Inc. - GroupNet™ - Fremont

Fresno
- Nichols Research, Inc. - GroupNet™ - Fresno

Sacramento
- Elliott Benson

San Francisco
- Ecker and Associates (Downtown)
- Ecker and Associates (South San Francisco)
- Fieldwork San Francisco
- Fleischman Field Research - First Choice Facilities
- Focus Pointe Global - San Francisco
- Greenberg Studios
- Nichols Research, Inc. - GroupNet™ - Concord
- Nichols Research, Inc. - GroupNet™ - San Francisco
- Plaza Research - San Francisco
- Schlesinger Associates - San Francisco

San Jose
- Nichols Research, Inc. - GroupNet™ - Sunnyvale

CALIFORNIA (Southern)

L.A. Orange County
- Adler Weiner Research Orange County
- Assistance in Marketing - Costa Mesa
- Fieldwork Los Angeles, Inc.
- Trotta Associates Irvine - First Choice Facilities

Los Angeles
- Adept Consumer Testing - Encino GroupNet™
- Adept Consumer Testing - Beverly Hills GroupNet™
- Adler Weiner Research (Westwood)
- Advanced Marketing Perspectives
- ASI Entertainment
- Assistance in Marketing - Long Beach
- Assistance in Marketing - Los Angeles
- Assistance in Marketing - The AIM Forum
- Atkins Research Group, Inc.
- Facts and Figures Inc.
- Focus Pointe Global - Los Angeles
- LW Research Group
- Meczka Marketing
- Murray Hill Center West
- Plaza Research - Los Angeles
- Qualitative Insights
- Savitz Field & Focus
- Schlesinger Associates - Los Angeles
- Trotta Associates MDR - First Choice Facilities

San Diego
- Flagship Research
- Luth Research
- Plaza Research - San Diego
- Taylor Research, Inc. - GroupNet™

COLORADO

Denver
- AccuData Market Research, Inc.
- Colorado Market Research
- Fieldwork Denver, Inc.
- Plaza Research - Denver
- TAi - Denver

CONNECTICUT

Danbury
- MarketView - Danbury

Norwalk
- New England Marketing Research

Stamford
- Focus Room - Stamford
- RazorFocus

FLORIDA

Fort Lauderdale
- Concepts in Focus- GroupNet™
- Plaza Research - Hollywood
- WAC of South Florida

Jacksonville
- Irwin Research Services

Miami
- 20/20 Research - Miami
- Advanced Market Research
- Miami Market Research, Inc.
- National Opinion Research Services
- WAC

Orlando
- AccuData Market Research
- Schlesinger Associates - Orlando

Tampa
- Herron Associates Inc., Tampa - GroupNet™
- Plaza Research - Tampa
- Superior Research - First Choice Facilities
- TAi - Tampa Bay

GEORGIA

Atlanta
- Delve - Atlanta
- Fieldwork Atlanta, Inc.
- Focus Pointe Global - Atlanta
- Jackson Associates, Inc. - GroupNet™
- John Stolzberg/Dynamic Research
- Murray Hill Center Southeast
- Plaza Research - Atlanta
- Savitz Field and Focus
- Schlesinger Associates - Atlanta
- Superior Research - First Choice Facilities

ILLINOIS

Chicago - Downtown
- Adler Weiner Research (Chicago)
- Chicago Focus
- Fieldwork Chicago - Downtown
- Focus Centre of Chicago
- Focus Pointe Global - Chicago
- Focuscope, Inc. - Chicago - First Choice Facilities
- MedQuery
- Murray Hill Center
- National Data Research, Inc. - Downtown - GroupNet™
- National Qualitative Centers
- Plaza Research - Chicago
- Savitz Field and Focus
- Schlesinger Associates - Chicago
- Smith Research, Inc.
- The Energy Annex

Chicago - Suburban
- Adler Weiner Research - Lincolnwood
- Assistance In Marketing - Chicago, Inc.
- Delve - Oak Brook
- Fieldwork Chicago, Inc. - North
- Fieldwork Chicago, Inc. - O'Hare
- Fieldwork Chicago, Inc. - Schaumburg
- Focuscope, Inc. - Oak Park - First Choice Facilities
- National Data Research, Inc. - Northfield - GroupNet™
- Precision Research
- Schlesinger Associates - O'Hare
- Smith Research - Oakbrook
- Smith Research, Inc.

INDIANA

Indianapolis
- Herron Associates/First Indiana Plaza - GroupNet™
- Herron Associates/The Idea Center - GroupNet™
- Walker Information

KANSAS

Kansas City
- Delve - Kansas City
- Q&A Research, dba The Field House

MARYLAND

Baltimore
- Assistance in Marketing - Towson
- Baltimore Research Agency - GroupNet™
- House Market Research - First Choice Facilities
- Observation Baltimore

MASSACHUSETTS

Boston - Downtown
- Bernett Research
- Boston Field & Focus Performance Plus - GroupNet™
- Copley Focus Centers
- Focus On Boston - First Choice Facilities
- Focus Pointe Global - Boston
- Schlesinger Associates - Boston

Boston - Suburban
- Boston Field & Focus Performance Plus - GroupNet™
- Fieldwork Boston, Inc.
- Focus On Boston - Braintree
- National Field and Focus

MICHIGAN

Detroit
- MORPACE International - GroupNet™
- Shifrin Hayworth

MINNESOTA

Minneapolis
- Cook Research & Consulting
- Delve - Minneapolis
- Fieldwork Minneapolis, Inc.
- Focus Market Research, Inc. - GroupNet™
- Orman Guidance Research

MISSOURI

St. Louis
- Delve - St. Louis
- Focus Pointe Global - St. Louis
- Lucas Market Research, LLC - GroupNet™
- Peters Marketing Research, Inc.
- Superior Surveys of St. Louis

NEVADA

Las Vegas
- Las Vegas Field and Focus
- Plaza Research - Las Vegas

NEW JERSEY

New Jersey - Northern
- Assistance in Marketing - Hackensack
- Assistance in Marketing - Morristown
- Decision Drivers - Montvale
- Fieldwork East, Inc. - Fort Lee
- Focus Pointe Global - North Jersey
- Meadowlands Consumer Center, Inc. - GroupNet™
- Plaza Research - Paramus
- PMcR Research, Inc.
- Schlesinger Associates - Edison
- TAi - New Jersey

New Jersey - Southern
- JRA, J. Reckner Associates - First Choice Facilities
- Plaza Research - Marlton

NEW YORK

New York - Suburban
- Access Metro NY
- Fieldwork New York, Inc. - Westchester
- Focus Room
- JRA, J. Reckner Associates - First Choice Facilities
- MarketView - Tarrytown

New York City
- Advanced Focus
- Focus Plus Inc. - First Choice Facilities
- Focus Pointe Global - New York
- Focus Room - New York
- Focus Suites of New York
- Murray Hill Center
- New York Consumer Center - GroupNet™
- New York Focus
- Schlesinger Associates - New York
- SIS International Research 22nd Street

NORTH CAROLINA

Charlotte
- 20/20 Research
- Leibowitz Market Research Associates, Inc. - GroupNet™

Raleigh
- First in Focus Research, Inc.
- L & E Research

OHIO

Cincinnati
- Assistance in Marketing - Cincinnati
- Market Inquiry
- MarketVision Research
- QFact Marketing Research, LLC
- Various Views Research

Cleveland
- Focus Groups of Cleveland Survey Center
- Pat Henry - Cleveland

Columbus
- Assistance in Marketing - Columbus
- Delve - Columbus

OREGON

Portland
- Consumer Opinion Services, Inc. - GroupNet™
- Gilmore Research Group – First Choice Facilities

PENNSYLVANIA

Philadelphia - Downtown
- Focus Pointe Global 18th Street - Philadelphia
- JRA, J. Reckner Associates - First Choice Facilities
- Schlesinger Associates - Philadelphia

Philadelphia - Suburban
- Delve - Philadelphia
- Focus Pointe Global - Bala Cynwyd
- Focus Suites of Philadelphia
- GFK Strategic Marketing
- Group Dynamics in Focus, Inc. - GroupNet™
- Schlesinger Associates - Bala Cynwyd

Pittsburgh
- Focus Center of Pittsburgh

RHODE ISLAND

Providence
- Boston Field & Focus Performance Plus - GroupNet™

TENNESSEE

Memphis
- AccuData Market Research, Inc.

Nashville
- 20/20 Research

TEXAS

Austin
- Tammadge Market Research, Inc.

Dallas
- Delve - Dallas
- Fieldwork Dallas, Inc.
- Focus Pointe Global - Dallas
- Murray Hill Center
- Opinions Unlimited - Dallas - GroupNet™
- Plaza Research - Dallas
- Savitz Field and Focus
- Schlesinger Associates - Dallas

Houston
- CQS Research
- MRS
- Opinions Unlimited - Houston - GroupNet™
- Plaza Research - Houston
- Savitz Field and Focus
- Schlesinger Associates - Houston

San Antonio
- Galloway Research Service - GroupNet™

VIRGINIA

Alexandria
- Martin Focus Group Services Inc. - Alexandria

Fairfax
- Metro Research Services, Inc.

Richmond
- Martin Focus Group Services Inc. - Richmond

WASHINGTON

Seattle
- Consumer Opinion Services - GroupNet™ - North 34th Street
- Consumer Opinion Services - GroupNet™ - Downtown
- Fieldwork Seattle - Pike Street
- Fieldwork Seattle, Inc.
- Gilmore Research Group - First Choice Facilities

WASHINGTON DC

Washington DC
- House Market Research - First Choice Facilities
- Shugoll Research, Inc. - GroupNet™

WISCONSIN

Appleton
- Delve - Appleton

Milwaukee
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- Lein/Spiegelhoff, Inc.

CANADA

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1 **Event That Must Be Experienced!**

Fall Conference Update

Don't Let Election Day Keep You Away

For this year's Fall Conference, MRA has combined high level education with numerous networking opportunities within the workshop format. The long list of remarkable speakers has heavily weighted the Conference with strong educational content to ensure plenty of key deliverables that you can immediately use.

This year the Fall Conference lands on Election Day. MRA recommends that Conference attendees utilize the absentee voting process. There are many myths surrounding the absentee ballot voting process and over the past few decades, election laws have made significant strides towards making absentee voting simpler and less restrictive. Although state laws differ, every state has the absentee ballot option. One of the most common reasons a person votes absentee is because they will be absent from town on Election Day.

How does one go about absentee voting? You may vote absentee beginning 31 days before an election. To obtain an absentee ballot, you can download an absentee ballot request form. You may also call, e-mail, write or apply in person at your county clerk's office. When the application is completed, it must be returned to your county clerk's office, which will then issue you the absentee ballot and required enclosure envelopes. The sealed marked ballot and signed outer envelope must reach the county clerk's office before the close of the polls on Election Day.

Absentee Voting Resources:
http://www.LongDistanceVoter.org
http://www.fvap.gov
http://www.vote411.org

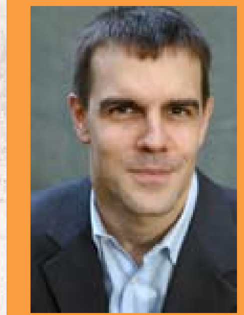
General Session

Heather Kluter is the Champion of Consumer Insights and Futuring at **Hyundai Motor America**. She has over 15 years experience in consumer insights and product development. Heather's expertise includes both quantitative and qualitative research methods, and unique methods for conveying product concepts.

Heather will discuss how existing and virtual/revolving cross-functional teams work together to develop one U.S. consumer-focused voice. She will explain how executive involvement in concept development and consumer research activities can speed the development process and facilitate an understanding about how teams get out of the boardroom and into the real world with in-depth concept immersions, ethnographic research and trend field trips. She will also highlight the importance of a creative environment and how freedom to fail plays a critical role in developing breakthrough products.

Don't Miss Quality Presentations By These Great Speakers!

Tom Anderson, Founder & Managing Partner, Anderson Analytics
Alice Butler, Vice President, M/A/R/C Research
Juan Carlos Arriola, Founder & Managing Partner, LatinVisa Interamericas
Tom Batchelder, Founding Partner, Perficency
Dan Coates, CEO, SurveyU
Jill Donahue, Manager, Nestle Purina
Ed Erikson, Principal, Erickson Market Research
Justine Erickson, Strategist, Egg Strategy
Howard Fienberg, Director of Government Affairs, CMOR
Aaron Hill, Director of Client Services, Sawtooth Software Inc.
Gavin Johnston, VP of Research & Strategy, Two West
Oliver Jouve, VP Market Strategy, SPSS Inc.
W. Christopher King, PRC CFO & Vice Chairman, Sawtooth Software, Inc.
Ricardo Lopez, PRC President, Hispanic Research Inc.
Sue McAdams, PRC President, Herron Associates Inc.
Pepper Miller, President, Hunter Miller Group
Annie Pettit, Director of Online Panel Analytics, Ipsos Interactive Services
Elizabeth Reaves, Product Manager, LinkedIn Corporation
Aaron Reed, Chief Behavioral Scientist, Sentient Decision Science
Melinda Roa-Holloway, President, Ethnographic Research Inc.
Allison Ruby, Director of Conference Services, Transperfect Translations
Janet Savoie, PRC Sr. Director, Client Development, Online Survey Solution
John Weisberg, Co-Founder, Tecneos Systems Inc.
Dan Womack, Manager Insights, Aflac Worldwide Headquarters
Lawrence Yeung, Founder & President, 361 Degrees Consulting, Inc.



Keynote Speaker

James Surowiecki is a columnist for ***The New Yorker*** and acclaimed author of the book *The Wisdom of Crowds.* In this book he describes systematic ways to organize and aggregate the intelligence available in your organization in order to arrive at superior decisions.

James will explore a range of problems with cognition, coordination and cooperation through everyday examples. He will show why if four basic conditions are met, a crowd's collective intelligence will produce better outcomes than a small group of experts. He will outline how to define a wise crowd and show how diversity, independence and error guarantee that the crowd's results are smarter than a single expert.

(Continued from page 25)

Trend Spotting

China has been receiving a good deal of attention in the Western media lately, due to its phenomenal growth and sizable market. China's population comprises one fifth of the total human population, numbering at approximately 1.3 billion. One fourth of its population is informally classified as the middle class, a segment set to nearly double by 2025. Those keen on the China market may read these numbers as testament to a burgeoning consumer base, and they would be correct. With a middle class nearly equivalent to the entire U.S. population, and their increased purchasing power, the China market has gained substantial importance to any competitive multi-national company.

China's middle class is most concentrated in the first tier cities, namely; Beijing, Shanghai and Guangzhou. Second tier cities are also home to millions of Chinese who are gaining purchasing power. Such cities include the likes of Wuhan, Xian, Ningbo, Harbin, Qingdao, Dalian and Shenzhen. These middle class urbanites are increasingly interested in the purchase of personal property, automobiles and mobile phones, along with partaking in travel and leisure activities. It is expected that migration to these urban metropolises from the rural country-side will continue well into the 21st century, presenting an expanding market demand for these products and services.

China's new consumer era is certainly catching on among the younger generations of the Chinese population. Much of China's youth is enraptured by American cultural and pop icons, and may seek to emulate the brand identification so common to large segments of American youth. A recent NPR China report stated that many Chinese youth regularly watch American TV shows such as Desperate Housewives, 24 and Sex and the City – all of which are downloaded within minutes of being aired in the U.S. The TNS China Source Book reports that the Chinese consumer believes the U.S. is far ahead of any other country in producing good music, movies, and drama. Evidence of this can be found in a recent segment on National Public Radio (NPR) as well as *National Geographic Magazine* (May, 2008) and a *Herald Tribune* article (January 2008). These all cite the increase in disposable income that has improved the overall purchasing power of the young Chinese consumer.

Further, this young Chinese generation is computer savvy; making up a large portion of the Chinese segment that use the Internet. As China now entertains the world's largest number of Internet users (with 220 million people regularly using Internet services), the Internet will continue to be an effective tool for reaching Chinese consumers – though it must be noted that users tend to be both younger and wealthier relative to the overall population – and could thereby bias market research results.

Another important trend to make note of is the rise of environmentalism in China. Environmental awareness is a growing movement in China, particularly in heavily industrialized areas where environmental degradation is most evident. The ruling party has stated in their most recent five-year plan that "Sustainable Development" will be a top priority in the next century. Similar attitudes can be found among Chinese consumers, who are seeking out brands that present the image of being environmentally conscious. Branding is a relatively new concept in China, but may prove to be an important in-road for Western products and services.

Targeting Key Segments

A unique feature of China's middle class is that it is relatively young. A recent McKinsey study found that the country's wealthiest consumers are aged 24-44. Online surveys or panels are an effective way to reach this group, although issues of representation should be considered. It is an especially good way to reach students, business executives and white-collar professionals.

Many of the Internet users in China go to Internet Cafés, as many do not have access to a computer at home. Conducting interviews at an Internet Café can be an ideal way to collect information from Chinese consumers.

Second tier cities are home to millions of middle class Chinese, but often lack the technology to support online surveys and / or panels. Reaching targets in second tier cities may best be accomplished through telephone interviews, as well as by one-on-one interviewing or focus groups.

While conducting focus groups in China, we have encountered the proliferation of the mobile phone. When respondents were asked to turn off their mobile phones for the discussion (which is a common practice in the U.S.) it was evident this was not an accepted practice. Most did not turn off their phones and continued to send and receive text messages

(Continued on page 36)

Dear Dr. Pete

To ask Dr. Pete a question, e-mail Pete Cape at pete_cape@surveysampling.com

Dear Dr. Pete:

I'm looking at the results of my international study for a tobacco company and I'm sure there is something wrong. Everyone in France seems to buy his or her smokes at one store called "tabac." What's gone wrong?

Philip Mason

Dear Philip,

Thank you. At last, a sensible question!

It may seem strange to us, but tobacco sales in France are strictly regulated both in price and in outlets. You have to be an authorized store (tabac) in order to sell cigarettes. You might also be a bar, a news agent, or a petrol station, but you must be a tabac. So, nothing is wrong with your survey. I'm willing to bet your client already knew what the answer would be in France. Good luck explaining why you didn't ask what type of tabac they buy from.

This brings up an important point. Many things are done differently in different countries and it is essential to localize your questionnaire. Some brand names change as you cross borders as do how things are bought and sold.

When you are working with local agencies, it is vital to leverage their local knowledge to make your questionnaire "work." Of course you have to draw a line between maintaining consistency of approach and localization. Watch out for people telling you, "This is not the way we do things over here." It may be they just don't want to try your way.

Keeping a positive, professional relationship with your research partners is crucial. You will learn the "why" and not just the "how," and be in a better position to explain it to your client. If you approach the relationship with a "client/vendor" mindset you will almost certainly get grief.

Consistency for consistency's sake is not a good way to conduct international research. And not only because of the differences already mentioned. Sometimes, we can be so set in our ways we forget why we do things — consider the "ethnic background" question. We use it routinely in the United States to balance our samples but forget that in other countries this may be either a sensitive issue or actually illegal. We use it in analysis perhaps because there are established media channels aimed at particular ethnicities, but is this the case in other countries you are covering? Again, take advice as to the best way to balance a sample for each country and learn about the media profile in each market.

If you're not working with partners, the Internet is a great source for information; and always look for a confirmatory second source. Not everything you see on the Web is 100% accurate.

Best,

Dr. Pete

P.S. One of the great joys of international research is finding out that people all over the world are not the same as you and me.

Dr. Pete Cape is the Knowledge Director at Survey Sampling International. He can be reached at pete_cape@surveysampling.com.

To read more of Dr. Pete's answers, be sure to check-out the September issue of MRA's eNews.

Respondent Cooperation

Sourcing With An Online Access Panel Provider

By Patrick Glaser, CMOR

Q: Many of the industry standards for online research pose questions about 'sourcing.' What exactly should you consider when discussing sourcing with an online access panel provider?

A: An access panel's sources are similar to a house's foundation. It doesn't matter what techniques and management processes an organization applies after the recruiting stage, if the sources aren't up to the task at hand, it will be very difficult to have confidence in the data.

The reason for this is easy to understand and fairly intuitive. However, it requires thinking about how panels are developed. People are either invited to join a panel through recruitment spots or invitations, or, they find their own way to a panel through searches or by directly contacting a panel provider. In both cases, the people recruited may have unique qualities that a researcher should be aware of, and consider, in the light of their research needs.

For example, if panel members are recruited from an entertainment news Web site, they are probably somewhat different from the "average" person in that they share a fairly developed interest in movies, television, stars and the like. This may link with a host of different variables, from the way the respondent spends their time, to the types of products and/or services they purchase. On the other hand, a more general source, like a popular search engine, would offer a pool of respondents that may tend to be more evenly dispersed in their characteristics.

Recruiting from sources with niche characteristics may result in the panel being more heavily composed of people who share those characteristics. Depending on the variety of Web sites used to develop the panel, the niche characteristics may be disproportional in the panel database. This may or may not matter to the researcher, depending on the variables they're interested in.

Understanding the composition of an access panel will help the researcher decide if the panelists fit with their needs. For instance, if looking for a sample of people who are more or less average when it comes to attitudes and opinions relating to coffee, it may not bother you that a chunk of the panelists were recruited from an entertainment Web site. On its face, there is nothing to suggest an obvious correlation between interest in entertainment and attitudes on coffee.

Keep in mind that without looking into the issue deeper, you won't know for sure. Using the preceding example for the sake of argument, it may be the case that people who enjoy star gossip may also tend to buy gourmet coffee more often than others. Perhaps there is a common link between the two concepts that's not easily discernable without a thorough analysis.

People are varied in their interests and qualities, and, in practice a panel may use a wide range of sources to develop a diverse, representative database. It's a good idea to have a conversation with your panel provider about how the research meshes with panel sources. They should be able to provide you with guidance about how their panel fits with your needs. Additionally, if there are certain sources that may be linked detrimentally with your research questions, it may be possible to have the panel provider exclude that source from sampling.

Lastly, the Interactive Marketing Research Organization (IMRO)'s Guidelines for Best Practices in Online Sample and Management identifies ethical and unethical panel recruitment practices; and discusses issues related to bias, data quality and other critical issues regarding an online panel (see http://www.imro.org/pdf/IMRO_Guidelines_for_Best_Practices_in_Online_Sample_and_Panel_Management.pdf).

Patrick Glaser is the Director of Respondent Cooperation, CMOR. He may be reached at pglaser@cmor.org.

CMOR is the only industry association actively performing the duties of watch dog on federal and senate issues. CMOR's offices are based in Washington, D.C.

For more information, please write to information@cmor.org.

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Research In The World's Largest Market

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throughout the discussion. The need for the Chinese youth to be in constant touch with friends is paramount to their existence – much like the youth in the U.S.

Women are particularly independent in China (compared to other Asian countries), as many are employed and therefore have the opportunity to spend a portion of the money earned. When conducting research among Chinese women, it is apparent that the women are especially receptive to gift incentives.

China has a substantial elderly population, due to rapid population growth prior to the One Child Policy that was enacted in the early 1980's. This is placing increased pressure on the government system to provide adequate pensions and health care for this population. By 2040, those over the age of 60 years will make up 26% of the Chinese population. Similar to the U.S., people will remain in the workforce longer due to improved health and increased need for financial stability to help sustain the longer life span.

Housing infrastructure changes will have to be made to help accommodate different living styles such as wheel chair accessibility (a policy that was implemented in the U.S. in the 1990's). Additionally, community centers, recreation facilities and medical facilities need to be built specifically for the aging population. Products, services, facilities designed for the healthier, wealthier and more mobile ageing Chinese consumer represent favorable opportunities.

When targeting groups for market research, keep in mind that "One China" does not mean "One Market." China is incredibly varied across regions, provinces, ethnic groups, from urban to rural areas and across classes, and hosts 53 distinct dialects and languages. China presents a heterogeneous market, so target segments should be carefully chosen and studied, and methodologies should be adjusted accordingly.

Tips and Precautions

There are currently over 1,000 market research agencies active in China. When choosing which vendors to work with, always enlist the help of a local agency. Check that vendors have a solid reputation, belong to relevant organizations and have paid staff onsite rather than subcontractors.

When possible, attend marketing / business development conferences in China. Conferences allow for initial meetings to establish successful relations, trust, and the face-to-face contact that is essential for many Chinese business transactions. When reputable and worthy contacts are established, nurture the business relationships that are formed. Human relationships (referred to in the Chinese business context as *Guanxi*) are paramount to smooth business deals in China, and can contribute to successful networking and development across the Chinese landscape. Look and listen to others and be aware and respectful of new customs and cultures. For example, some Chinese may not be willing to speak openly in focus groups for fear of "losing face," a cultural term that represents maintaining the dignity of themselves or their superiors. Be aware that 'warm-up' time for qualitative research in China may be significantly longer than other countries as the rapport between the moderator and respondent needs to be established in order to glean useful information.

Obtain and review statistics with flexibility and scrutiny. The Chinese Bureau of Statistics prefers to maintain a strong hold on economic figures, and what numbers can be located are often rough estimates. Expect and plan for this. Patience will prove to be invaluable, as foreign research firms need to gain approval from the Bureau before conducting research (though this bureaucratic practice often stalls the project for only days or a week).

On a similar precautionary note, due to weak enforcement of intellectual property right laws, counterfeiting is still abundant across China. This is a major hurdle when introducing products and developing brands. Establishing good business relations with Chinese retailers is highly recommended as an important step in seeing the success of your product or service.


Overlooking the Forbidden City

Lastly, communicate quality, as charging a superior fee requires market research firms to produce superior results. The premium charged for Western business services has been slipping for several reasons, such as strong competition between Western companies, the improving quality of local services and communication and more local staff in international firms providing critical insight.

In Summary

The China market presents tremendous opportunity to grow your business. However, when entering the market, be knowledgeable of the benefits and disadvantages associated with its vast marketplace. From the perspective of primary market research, keep abreast of market trends, population segments, and targeting techniques to help your research produce reliable and successful results.

Wendy Jenkins is the Vice President of The Praxi Group. She can be reached at wendyjenkins@praxigroup.net.

Roxanne Salen is a Project Coordinator at The Praxi Group. She can be reached at roxannesalen@praxigroup.net.

All photos courtesy of Michael Mermelstein, President, G2 & Associates. He can be reached at michael@g2associates.us.

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this information.

Here are three things to find out:

What type of specialists treat the disease in each country? For example, in a breast cancer study, don't assume you only need to survey oncologists. In France, a significant number of breast cancer patients are treated by their Ob/Gyn, so you must include both specialties in your sample.

What are the country names of all the drugs you are testing, not just the leading competitive drug and your client's drug? In France, for example, the U.S. drug Biaxin is marketed as Naxy, Monozeclar, Mononaxy and Zeclar.

What is the incidence for all the screening questions you are studying? When a U.S. client gives you the name of a leading drug, the client probably means the leading prescribed drug in the U.S. In other countries, the drug may not even be prescribed, and most likely will be prescribed at a different incidence level in each country. If a drug is prescribed by 50% of the physicians and the study specifies 80%, there will likely be a major impact on costs.

5. Think Local: Legal

Different countries have different rules about interviewing physicians. For example, in France, a client may require you to get approval from a government board. In Germany, if a physician works for a public hospital, you may be required to get approval from the hospital to have the physician complete a study. Not knowing the legal requirements of your client can be costly.

Countries also vary by the type of healthcare plans available. If you have survey questions involving payments and pricing, make sure you and your panel provider understand local healthcare laws.

6. Think Local: Survey and Cultural Issues

Do an incidence check. If your client tells you the incidence

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Now Hiring!

Account/Project Manager Position

AcuPOLL Research, headquartered in Cincinnati, Ohio, is looking for an ACCOUNT/PROJECT MANAGER with excellent analytical, communication (verbal & written), organizational, time management and project management skills. Primary Responsibilities: • Designing a wide range of custom research studies to meet specific research objectives • Assisting in/determining project pricing • Managing projects from proposal to final report • Leading internal project teams • Developing and maintaining client relationships • "Soft" selling – selling existing clients the "next" project • Some travel required (Average 3-5 nights/month) Qualified applicant should have: • BA/BS in life sciences, marketing or business • Four+ years market research experience, including project management experience • Ability to multi-task • Strong organizational skills • Strong verbal and written communication skills • Confidence to exercise independent judgment • Proficiency with Excel, PowerPoint and Word • Management/Leadership experience a plus • Qualitative experience a plus To apply for this position, please submit your resume via email to Ericca Dennehy – ericca@acupoll.com.

Market Research Analyst/Project Manager

Classification: Marketing
Occupation: Market Research
Career Level: Experienced
Location: Rockland, MA
Company: Smiths Medical
Industry: Manufacturing - Medical Devices

Smiths Medical is a division of Smiths Group a global technology leader headquartered in London, England. Smiths Group is a diverse group of businesses and our people continue to reflect that diversity. Smiths businesses employ approximately 22,000 people in over 50 countries. Traded on the London Stock Exchange and recognized as a FTSE 100 index company. When you join us you will be involved in making products and offering services that make the world safer, healthier and more productive.

With strong analytical, interpersonal, and written communication skills and excellent planning, organizational, project management and time management skills, the successful candidate will plan, coordinate, collect, analyze and report findings from market research activities, inclusive of both primary and secondary market research.

Specific responsibilities include, but are not limited to:

- Conducting secondary research and report on findings.
- Planning/coordinating primary research projects, inclusive of defining methodology, survey design, vendor selection, and overseeing data collection.
- Conducting quantitative analysis on primary/secondary research data to develop business insights and translating findings into actionable solutions (i.e., report writing).
- Coordinating and facilitating information needs of departments and/or product franchises, as needs arise.

Qualifications include:

- Four year degree in life sciences, marketing or business; masters degree a plus.
- 3+ years experience in market research or marketing, preferably in the health care industry (but not required) or with a market research supplier, including experience in managing projects from start to finish.
- Ability to work on complex problems where analysis of situations or data requires an evaluation of intangible factors.
- Working knowledge of SPSS and/or Sawtooth Software desired.

We offer competitive salaries with an outstanding benefits package, including Employee Medical, Dental, Vision, & Life Insurance, Optional Spouse & Dependent Life, 401 (k) with Company Match, Retirement Account Plan, Paid Time Off, Tuition Reimbursement and more.

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Project Director

Turnkey Sports and Entertainment seeks an individual that will play an important role in the analysis of client research and survey results. In order to learn more about and apply for this position, please go to **www.turnkeyse.com** and apply under the search tab.

Marketing and Data Analyst

ASME is a 127,000 member professional organization focused on serving the technical, educational and other programmatic needs of the engineering and technology communities on a worldwide basis. As a part of its mission, ASME generates approximately $75 million in revenues from the sale of products, programs and services. A Marketing and Data Analyst is currently being sought to join the Market Research and Data Analysis Department. The Market Research and Data Analysis Department will be accountable for a variety of market research and data analysis activities including, but not limited to: development of market research surveys, analysis, and the preparation of reports and presentations. The Marketing and Data Analyst, reporting to the Director, Market Research and Data Analysis, will be responsible for gathering, analyzing, and

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10 Ways To Get Involved In Elections

By Howard Fienberg, CMOR

Members of the survey and opinion research profession have a unique opportunity to help elected officials. By providing technical and practical information and advice to policy makers – in the how and the why of research, not just polling data – members of the profession can assist lawmakers in making informed decisions about the quality of peoples' lives.

How does a researcher become more acquainted with policy makers? One of the best ways is to participate in elections, and not just by voting for President this year. Local, state and Congressional elections often provide the easiest way to become personally familiar with present and future policy makers.

So, here are 10 ways to get involved in elections:

1. Register to vote. Obviously, this is the most important part of the election process. Members of the research profession can obtain information on voter registration from their local Registrar of Voters or Board of Elections office, usually listed in the blue pages of the phone book or can register in most states when renewing a driver's license. Visit http://www.beavoter.org for information on registering to vote.

"Local, state and Congressional elections often provide the easiest way to become personally familiar with present and future policy makers."

2. Vote in your state's primary. Most Presidential and Congressional Primary dates can be found on the CMOR Web site at http://www.cmor.org/ga/scn_getvote.cfm. Many states require early registration for their primaries, so researchers should register early. You may have missed out already.

3. Vote on Election Day. Researchers should make sure to vote on Election Day. If expecting to be out of town, apply for and send in an absentee ballot.

4. Watch or attend candidate debates. It's a fast way to become familiar with the issues and to see how the candidates stack up. If unable to catch them in person, check local cable channels, or C-SPAN, for broadcasting of debates.

5. Visit with candidates at Candidate Forums and "Townhall" events. Campaigns and community groups often hold "Meet the Candidate" events. Such forums provide an opportunity to learn more about the candidates, meet them personally, ask questions, or offer personal views on important issues. Check candidates' Web sites or local newspapers for upcoming events in the local area.

6. Invite candidates to the workplace/jobsite. Let them tour where research is done. Not only will candidates become more familiar with members of the research profession, but they'll get to know more about research and the profession as a whole. (Contact CMOR - we can help coordinate these walk throughs.)

7. Gather information on the candidates and decide on favorites. Candidates will usually provide information about themselves and their viewpoints on the issues, in the press and on their Web sites. CMOR has already examined the Presidential candidates' positions on certain issues of importance to the research profession – now researchers need to look into their own candidates down the ballot.

8. Write to the local newspaper about who is the best candidate and why. Once a favorite candidate has been chosen, researchers need to spread the word. Researchers can publicize their concerns as researchers or interested constituents. Other voters may not understand the importance of a candidate's views on privacy, data security, telecommunications and information technology. However, members of the survey and opinion research profession can bridge that knowledge gap by explaining the pros and cons of various regulations, or the importance of certain technologies and methodologies. Contact CMOR (or MRA) for guidance on submitting op-ed pieces.

9. Give money to favored candidate(s). If there is no time to volunteer on a candidate's campaign, individuals can donate to the candidate's campaign fund. Giving to a preferred candidate's campaign may help that candidate to get elected. Researchers should be aware that certain state and federal laws regulate campaign contributions. For example, **CMOR, as a non-profit organization, is prohibited from both contributing to campaigns and endorsing candidates for public office.** Guidelines on federal election contributions are available online at http://www.fec.gov/citizen-guide.html .

10. Volunteer on a candidate's campaign. One of the most valuable things a member of the research profession can give to a candidate is their time. It might be for an hour, a week, or a year – the commitment is up to the individual. Again, contributions of time or money must be made by individuals. For more information on getting involved in politics and policy at the grassroots level, consider becoming a grassroots volunteer member of the CMOR State Capitol Network.

Howard Fienberg is the Director of Government Affairs at CMOR. He can be reached at hfienberg@cmor.org.

CMOR is the only industry association actively performing the duties of watch dog on federal and senate issues. CMOR's offices are based in Washington, D.C.

For more information, please write to information@cmor.org.

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Meet Ken Roberts, PRC

Name: Ken Roberts, Certification Board Chair
Certification: Quantitative Expert
Company: Cooper Roberts Research
Location: San Francisco, CA
Job Title: President
Web site: www.cooper-roberts.com

1.) How long have you worked in the MR profession?

34 years

2.) What positions/titles have you held?

I started right out of college at a company in Cincinnati named Burgoyne. I initially worked in sales research and then consumer research. I moved to San Francisco in 1984 to manage their West Coast office. In 1991, together with Sandy Cooper, I founded Cooper Roberts Research.

3.) What does PRC mean to you?

Obviously I'm a little biased, but I'm hoping it will become a tool used by the industry to keep people from saying "hey I'm a market researcher." It gives the buyer of research services and the hirer of researchers the confidence that the person has the appropriate baseline of experience in market research.

4.) What interested you in the PRC program?

I've been involved in a lot of industry associations for the past 20 years. People have talked about doing this for a long time. I became interested in this particular program because I saw that MRA was serious about making it happen. They had the vision and commitment to make it happen.

5.) How have you encouraged your employees to gain certification?

At one point, every one of our researchers was certified. But we have come to learn that this is not feasible with junior staff due to the churn. All of our senior staff is still certified. While it's not a requirement for employment, we make it clear that it is expected. You're going to have more opportunities here if you are certified, and it is a clear goal stated in each employee's annual review.

6.) In your opinion, should market research professionals earn the PRC designation? Why?

During the first dot com boom, there were too many people out there calling themselves market researchers who didn't have the appropriate skill set. In fact, I think the failure of some of the dot coms can be tied right back to shoddy research. Also the buying client is changing. Clients use to have a classical marketing research background. But today, more and more of them do not. They need the comfort of knowing they are hiring true, competent professionals. PRC helps give them that comfort. I know there are a lot of people who have been in the industry a long time who feel they don't need certification. They feel their experience is enough. I agree that experience is crucial, but so is continual education. Our once stagnate industry is changing rapidly. You need the education component to stay relevant. After all, I have 34 years of experience, but PRC has made me an even better researcher.

7.) In your opinion, what are the three most valuable things your PRC designation provides you, professional and personally?

First, we are a research company and we do market the fact that our people are certified. While a lot of clients don't know or understand what PRC is, when I have the opportunity to explain it, once they get it, it gives us an advantage.

Second, I know my friends and family think "he's certified he must be good." My 87 year old father takes a lot of pride in my certification. Third, it has opened up a different network of professional contacts for me. I have seen a bond grow among fellow PRCers.

8.) Why did you get involved at the volunteer level in the development of PRC?

Joan Burns asked me to get involved. I did see that for this industry to be taken seriously, we needed to take that next step and I saw it as an opportunity to have an impact.

9.) What have been the challenges with PRC?

It has been a lot more work than anyone ever anticipated. There is a board that certifies certification programs. We have to work hard to meet very strict standards. Then there is still people's resistance to getting certified. But that is dwindling. Testing for PRC is well underway but it has been a challenge to develop the actual test. And more formal marketing of the program to end clients is needed.

10.) Where do you see PRC in five to 10 years?

I'm hoping we will be at the point when a research company only buys from vendors who are PRC and likewise for end clients to be looking for research companies with PRC staff. It will basically be a requirement for people to work in the industry. You're not going to work with an accountant who is not a CPA or a lawyer who did not pass the Bar.

(Continued from page 41)

providing information that provides actionable and insightful recommendations to drive business decisions. The incumbent will consult with other departments within the Marketing and Sales organization as well as other business units within ASME. Requires a Bachelor's degree in Marketing or related field and at least five years of relevant experience either with a consulting organization/vendor and/or in a corporate environment. Good written and oral communications are essential. Editorial skills and experience with online questionnaire development packages like QuestionPro is a plus. Analytical aptitude as well as a proven ability to plan, prioritize, and handle multiple projects with tight deadlines simultaneously is important. Only those candidates selected for further consideration will be contacted. We are an Equal Opportunity Employer. Send resume, along with salary requirements to: crecruitment@asme.org

Field Recruiter and Assistant Coordinator

Market Research Company in Yardley, PA is looking for a field recruiter to Assistant Director. This person will be responsible for recruiting respondents for Market Research. Applicant must have excellent telephone communication skills along with organization skills. This is a fast paced atmosphere with strict deadlines. Must be experieced in Microsoft Office, Word, Excel, Outlook, and ACT database. Send resume to JT@acures.com

Operations Assistant - Customer Satisfaction Research

Baltimore, MD

Part-time (20-30 hours/week); full time potential. Report to VP of Operations. Assist in all duties related to customer satisfaction web survey program setup/rollout including use of existing web survey modules, plus sample management, participant recruitment, reporting (using existing software; some custom reporting). Qualifications: Microsoft Excel, Microsoft Word, Adobe Illustrator (basic understanding); Crystal reports, database management, SPSS a plus. Personal qualities: detail oriented; time management skills; self-motivated; receptive to supervision and to learning; good communication skills; personable; team player. Compensation negotiable. Email resumes to careers@satisfacts.com.

Facilities Wanted

Do you own a 50 - 75 seat call center that is not consistently busy? We are a 300 seat U.S. based call center with an offshore facility and the capabilities to do in-house web surveys, global field management, tab and coding. We are looking to expand. If you are interested in joining us or selling to us, please contact us in confidence. To apply, please e-mail Connie at connie.yan@mra-net.org.

Qualitative Research Project Leaders

ModelPeople is a research and brand consulting company based in San Diego, CA. We combine innovative qualitative and deep insights research approaches with print and video media production to bring insights to life for our clients, major consumer brand marketing companies in a wide range of categories. Rapid growth, largely from client referrals, has led to the creation of two new positions for project leaders with a passion for qualitative moderating/interviewing to help design and execute consumer research projects and participate in the development of insights and strategic recommendations in a creative and mentoring environment. Successful applicants will have a Masters degree in Sociology, Applied Anthropology, Journalism or Communications and must have a minimum of two years' experience interviewing or moderating. Experience with consumer brands is a plus. Benefits package includes generous bonus scheme, health insurance and 401k. Please respond to andrew_long@modelpeopleinc.com

Consumer Insights Manager, Ice Cream

Wells Dairy, Inc., the maker of Blue Bunny Ice Cream is looking for a professional to drive business strategies by generating insights obtained through primary research and analysis of a wide variety of secondary data sources; lead the insight adoption process across functions. Should have 5+ years experience in Market Research with a CPG manufacturer. Please apply on-line at www.wellsdairy.com and/or email dpdoty@bluebunny.com.

Research

Two Rivers Marketing — a full-service firm based in Des Moines, IA — is looking for an individual to assist with research efforts for business-to-business clients. Qualified candidates must have 5 to 7 years of research experience and should be familiar with all facets of marketing. Individual must be detail-oriented with the ability to analyze and identify client needs. Please go to www.tworiversmarketing.com for more information.

Facility Manager

Focus Pointe Global, the national industry leader in the field of marketing research, needs an experienced Facility Manager for our busy Atlanta office. High level corporate marketing and brand executives use our facilities everyday for new product tests and advertising development. Responsibilities include oversight and management of all qualitative operations; all areas of project execution; managing clients needs, scheduling and managing staff; project briefings; preparing rooms and facilities; food service; audio/visual equipment functions; inventory control; host/hostess to clients and guests. Submit cover letter and resume to swyatt@focuspointeglobal.com

To view more or place job listings please visit:
http://www.mra-net.org/media/onlineclass.cfm

Counterpoint

Mind The Gap

By Peter Van Brunt

At every research conference I have attended over the past few years, I overhear one or more researchers saying they lie so that they can get by screening questions and participate in research studies. Many freely admit to doing this so that they can belong to several well-known panels.

Over the past 30 years lying has become an increasing part of our culture, and we have moved far from George Washington's fabled "I cannot tell a lie."

For years we expected politicians to stretch the truth, and in the past years that has not changed. However we have seen multiple examples of the press fabricating stories both on TV and in print, and we are all familiar with the fact that lying in schools and on papers and tests has become so commonplace that it has inspired a whole new set of software tools to assist teachers in seeking out work that is copied from sources on the Internet. Every employer I know receives job applications and resumes which contain obvious fabrications and many employers use private investigators to look into prospective employees' backgrounds.

Lying has become so commonplace and expected that some even investigate their potential mates before agreeing to become involved in a serious relationship. The Internet has become a fertile ground for those who want to fabricate whole new personas.

You might be wondering, "**How does this cultural acceptance of lying impact our profession.**" The key for researchers is to expect this kind of behavior to take place, and to understand its impact on our work. The gap between truth and respondent answers is getting bigger all the time.

For years, qualitative researchers have been battling "professional respondents" who have learned what they have to say and do to participate in focus groups. Many of these respondents think of it as a job or a game, and unfortunately some of the less than reputable facilities utilize so called "professional respondents' to keep their prices low. Some moderators I know have encountered "professional respondents" so frequently they no longer permit the facility they use to do any recruiting for their groups.

Lying on all varieties of quantitative surveys is on the increase as well. As we have seen a drop-off in participation, we have tried to offset low cooperation rates with increased usage of incentives. This has become so commonplace that some quantitative respondents have also moved into the problematic area of "professionals" whose sole purpose is to reap "rewards." There is no place where this has become more of a problem than on the Internet. Unfortunately for researchers this has become the key venue for more and more of our work. Economic and time pressures frequently preclude any other methodology.

As researchers, we have to be increasingly aware of this problem. If we want to have a "seat at the table," we must do good work, and make every effort we can to prevent respondents who lie from becoming part of our results.

How big is this problem?

This problem is as near as I can detect, on most online polls 4-6% of the respondents who are obvious satisficers and in most cases easily eliminated. In addition to these easily detected liars, I think there is a similar percentage who are much more difficult to detect, and this number is growing. If this adds another 5% error to whatever other error rates are associated with the sample or research technique employed, then we are quickly approaching an error rate in excess of 10%. This has the potential to make our efforts sufficiently inaccurate that they might become of little or no value. As our work becomes less credible, it increases the pressure on businesses to move away from the "soft" data and questionable results of primary research and towards the "hard" data and results of observational and behavioral research. This trend has already started. As data mining and observational tools become easier to use, this kind of secondary research will increasingly rob budgets and funding of primary research.

What can we do?

Unfortunately we can't change the culture of lying, but we can become more aware and alert to the problem. We need to devise better techniques to "weed out" those who are likely to be lying and skewing our results. We need to address these issues and brainstorm solutions. We have been ignoring this problem for too long, just hoping it will go away and not impact our profession. It won't go away, and we can't continue to ignore it.

Peter Van Brunt, PRC, is a Past President of MRA and is an Honorary Lifetime Member. He can be reached at at peter@redatainc.com.

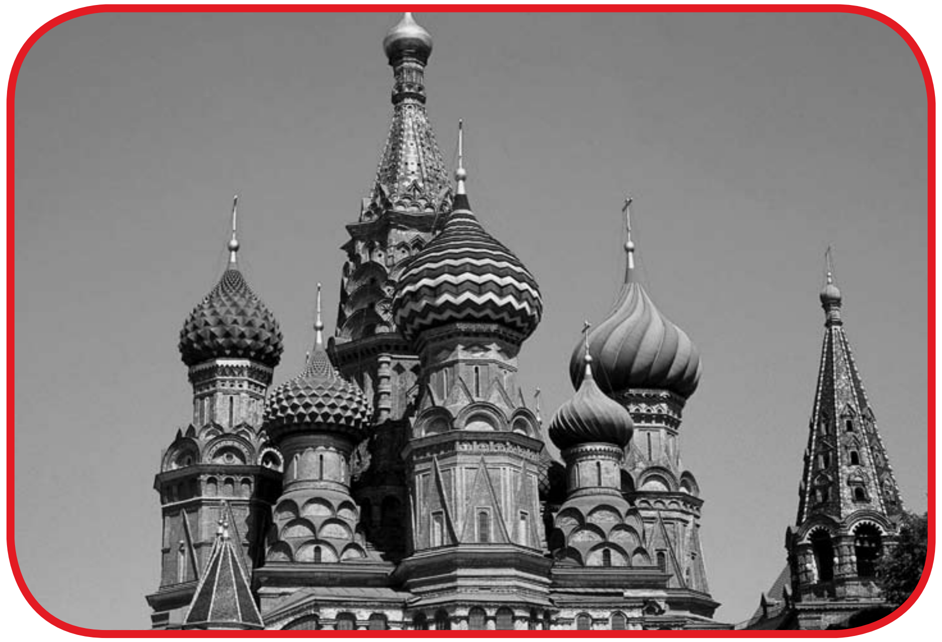
Doing Research In Russia

Misha Neverov, Amry Research

What are some problems/issues you encounter in Russia that are not common in the U.S.?

The obvious concern that most clients have is the level of Internet penetration in Russia, and the representativeness of the online results compared to other methods. Appropriateness of online as methodology will vary with both the nature of the study and the target population being studied.

It is important to have the questionnaire carefully localized to elicit thoughtful responses. Russians take great pride in their culture and language and do not respond positively to a poorly executed, non-native translation. Because we own our panel, we carefully pretest our surveys with ample feedback from both our native translators and our consumer community.



Due to uneven distribution of wealth and the high quality of education in Russia (and other former CIS countries), there is heightened incidence of hackers and professional respondents. Careful monitoring of respondent characteristics, personal dialogue between panel members and panel moderator, and examining patterns of behavior are key to detecting panelist fraud and maintaining quality.

What is your vision for the future of online marketing research in Russia?

While online research is experiencing rapid growth in Russia, it's still in the relatively early stages. It's clear that it will continue to gain traction as an effective methodology in this growing economy spread out over 11 time zones. We are excited to enable Russian consumers to speak out (and they are eager to share their opinions - our panel response rates are well over 50%, sometimes over 70%) and are happy to provide market research companies with access to our panel to enable their voices to be heard.

Name: Misha Neverov
Company: Amry Research
Location: St. Petersburg, Russia; Hershey, PA
Size Of Company: Three full-time and six part-time
Web site: www.amryresearch.com
Primary Focus: Exclusively on Russian market with further focus on using online for data collection

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of use of their drug is 75%, ask: Is the drug prescribed at the same level in every country in the research? If the incidence is 50% instead of 75%, then one third fewer people qualify, so you must contact more respondents. This will cost more and may impact the ability to meet the schedule.

Study length matters. In the U.S., physicians will quickly ask for more honoraria if the survey runs longer than indicated in your e-mail invitation. In Europe, doctors seem less concerned if the study is a bit long, while in Germany, a study will always be longer because there are more words. In Japan, many think long studies are culturally unacceptable and should be avoided, but I have found that, while challenging, long online studies are more acceptable today.

In cultures where such studies are completely unacceptable, don't give up. Offer your client an alternative, such as an in-person study or sending interviewers to doctors' offices to complete the study. Remember: If you cannot determine how to obtain the sample your competitor probably can.

Holidays are serious business. In the U.S., holidays are often good times to conduct online studies with physicians. But in Europe, holidays such as Easter, Christmas and during vacation periods in August make recruitment difficult. So before you begin your study, check each country's calendar – a study that was intended to field in four weeks can easily take six to eight weeks if a delay in preparing the survey ends up causing the fielding to run into a holiday.

7. Prepare Everyone for Reality

At the outset, remind your client that outside the U.S., population sizes are smaller, and the study length of time, from questionnaire to final data, will be longer. Public holidays and healthcare conferences may also mean delays. Naive clients will not realize that you will require additional time for translations and getting approval of translations.

The bottom line is to make sure you include an estimated schedule in your bid and to have it reviewed by your client.

8. Pre-Test Your Study

Pre-testing to learn more about the topic, physicians and disease in the countries you are studying is more important than ever for designing a global physician study and avoiding costly mistakes. There are several pre-testing options to find out if there is a particular problem with the questionnaire: conduct qualitative, online or telephone pilots.

Qualitative. Qualitative research is the most comprehensive but costly. It provides good background and can answer specific questions. While it takes longer to set up, feedback is immediate.

Panel provider. Your panel provider can call a few doctors, e-mail a few of the more pertinent screening questions or actually pre-test the entire screener to determine the actual incidence. This choice is the fastest and least costly but less comprehensive than qualitative pre-testing.

Online/telephone. Respondents complete a brief online survey and are debriefed by telephone. Set-up is longer but feedback is immediate.

9. QC Your QC Process

There are ample opportunities for global physician online research to go wrong, so develop a quality control checklist for each study. Include the following:

Programming. Be certain the questionnaire is final before you begin programming. Make sure all questions are properly translated. Some of the newer programming techniques do not always work well in every country. Look at every question in every language to see that each one has been translated. The overlaying of translations makes it easy to leave a question untouched.

Translations. Make sure the translation company knows medical terminology. Get a paper translation first and review it carefully. It is very difficult to have your client approve the translation from an online version. It is worth the money to commission a paper translation. Have your internal contact and/or client review the translation. You must agree on who will review the final translation. For example, if your client plans to have a local division within the company conduct the final translation review, you need to know this. It gets very expensive to have the entire questionnaire translated online and then find out that the client's local affiliate wants to have a "quick look." I can guarantee they will have major changes. You need to agree on who will give final approval at the time the paper translation is done.

Be prepared for disagreements in translations. For example, Spanish in Spain is very different from Spanish in Mexico. If your translator is from Spain and the reviewer is from Mexico, there will be differences. It is important to make sure the translator is translating based on the language of the respondents.

Watch for programming order. For example, the place for the brand name in a sentence can vary in different languages.

Monitoring the study in the field. Watch the incidence closely. If there is an incidence issue, review the detailed responses so you can see if there are areas where you can make changes that will increase the incidence.

Closely watch survey length. If the survey is running longer than planned, you could be responsible for additional honoraria charges.

Watch quota growth each day. If you do not see movement, you need to contact your panel supplier to see what can be done.

Run data checks while the study is in the field. If you need to remove respondents because they are inconsistent or responding quickly with fixed patterns, the respondents need to be removed while the study is in the field so they can be replaced.

Data checking. Data is usually correct, but if it seems odd, check the translations first.

10. Get It Right the First Time

If you think you can go back to respondents with changed specifications (honoraria increases, less-stringent qualification requirements) and then complete the study, think again. About 30% of previously screened respondents will not respond the second time around. Your universe is limited, so get it right the first time or you can ruin your global study.

While there will inevitably be challenges along the way, following these 10 guidelines will lead you to the greatest chances of a successful international study. Being prepared, knowing country nuances and working with a well-qualified panel provider are your best insurance of client satisfaction and a smooth ride. Place the checklist from Box B on your wall so you can guarantee success.

But most of all, have fun doing global physician online research. The challenges allow you to show your stuff and learn.

Jerry Arbittier is the President of All Global. He can be reached at jerry.arbittier@allgloballtd.com.

Tony Burke is the Managing Director of All Global.

BOX B

10 Steps to Successful International Physician Online Research: Your Global Checklist

- ❑ Know your effective sample size
- ❑ Carefully choose your panel supplier
- ❑ Establish central control
- ❑ Think local: healthcare practices
- ❑ Think local: legal
- ❑ Think local: survey and cultural issues
- ❑ Prepare everyone for reality
- ❑ Pre-test your study
- ❑ QC your QC process
- ❑ Get it right the first time

Going Global With Steve Schlesinger

Name: Steve Schlesinger, PRC
Company: Schlesinger Associates
Location: Edison, New Jersey
Job Title: CEO
Web site: www.schlesingerassociates.com

What is the history behind your company?

We were founded in 1965, and were focusing more on quantitative research until the early 1980s. We opened our first facility in 1986 and continued to develop our U.S. facilities until 2003 when we started looking abroad. We started off in New Jersey and didn't open our second facility until the early 90s. Most of our growth in the U.S. was between 1996-2006.

You have 14 facilities, how many branches did you open in the U.S. before opening more in the U.K.?

We had 11 in the U.S. before opening in the U.K. and three more since then.

What made you go global?

About 12 years ago we started to see a real influx of research assignments from European companies; they looked toward us as their strategic partner in the U.S. to manage data collection efforts, mostly qualitative. Over the course of six years we developed significant relationships with many of these companies. Over time they indicated to us the need to provide the same level of service and research capabilities in the European countries as we do in the U.S. That prompted us to really go out and look at how we take

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Dear MRA Member,

Each March, MRA invites current members in good standing to elect the National Board of Directors.

One of the goals of the Nominating Committee is to consider qualified MRA members who represent all segments of our membership for this honor. Every effort is made to include members from a variety of geographical locations and business sectors that make-up our membership. We also look for special skills such as the ability to: analyze finances and work processes, communicate with Board and Association members, represent the Association to our partners and our publics. Lastly, we need Board members who have experience in the profession, are committed to the Association's mission and values, and who have time to devote to the volunteer position of Board member.

There are many MRA members who meet these criteria, and the Nominating Committee needs to identify and consider talented members for each Board position. We greatly need your help. If you know of, or are familiar with someone you think would make a good Board member, please contact any of us on the Nominating Committee, or e-mail Yvonne Gonzalez at yvonne.gonzalez@mra-net.org.

I am pleased that the following people have agreed to serve on the Committee:

Cathy Winters, PRC	Kimberly Clark	End User
Kim Stephens	Carbonview Research	Online Data Collection
Paul Posluszny	MSG	Related Services
Colleen Moore Mezler, PRC	Moore Research	Full Service
Merrill Shugoll, PRC	Shugoll Research	Full Service
Barb Hurt	Kantar	Full Service
Magda Cooling, PRC	Opinions… of Sacramento	Focus
Don Marek	MRII	
Kim Larson, PRC	Information Alliance	
Lawrence Brownell (ex officio)	MRA Chief Executive Officer	

We finalize the slate for the March election in October. The Board of Directors votes to approve the slate at their Board meeting during the Fall Conference in Las Vegas this November. Please forward any recommendations to the Committee or to me no later than September 22.

I look forward to seeing you in Vegas!

Kim C. Larson

Kim C. Larson, PRC
MRA President-Elect

(Continued from page 51)

Schlesinger Associates from being a large player in the U.S. and create a presence outside the U.S. About 4 1/2 years ago we started an exploration of where we should start this venture and we engaged a merger and acquisition consultant. The conclusion was that the U.K. was the best place to start mainly because it eliminated the language barrier.

What was the hardest part of going global?

Understanding the cultural differences, labor policies, engagement of research and staff. Different nuances in different countries. It was relatively easy because the U.K. is the most similar country to the U.S., outside of Canada. Even with that in mind, there are differences; how people approach research, how the public perceives research. Even things like how a company operates; laws, employment, renting space, contracts.

Was there difficulty adjusting and learning a new culture?

We noticed that we did have to be sensitive, that our style whether it is typical American or not, was much faster and less detailed in nature, whereas our partners overseas expected much more of an exchange of information and a more deliberate approach to decision making.

Different cultures react to surveys and phone interviews differently, how do you keep from offending the locals?

We bought a company that already had an existing business, dynamically we didn't change, and we added some services to client offerings. The only significant difference we saw between the U.S. and U.K. was a sentiment of caution with regards to creating a centralized database of respondent data.

How many trips did it take before finalizing and opening day?

We took about five trips and our partners came over here two times.

What will be the next country?

Germany and France are both on our radar screen.

How do you decide on locations?

Based on research expenditures in those countries and opportunities with our existing client base and prospective clients, we decide on where to go next.

Do you have any words of advice to offer those considering going global?

It is really important to do your homework. Understand what you are getting into from both a financial and time commitment. Also, be sensitive to the fact that it can't just be your way all the time. It is a blend of what you bring to the table and what your partner brings – rely on local expertise and the guidance of experts and your advisors.

Profession News/Announcements

Lightspeed Research has launched a personal care and grooming panel in the U.S., Canada, the U.K. and Germany.

e-Rewards was named one of the 50 Best Small & Medium Companies to Work for in America.

United Sample has hired **Susan Hwang, Michael Brezner, Jeffrey Unze** and **Reid Behrendt.** United Sample recently acquired more than 250,000 active global panelists through a private acquisition of an online survey Web site.

U.K. Based **B2B International** has opened its first U.S. office in NYC.

Gazelle Globalization Group has rebranded their company and goes by **G3Translate** in response to customer feedback about their company's function.

The most comprehensive tool available for training and retaining telephone survey call center employees... CMOR's **Interviewer/Supervisor Training Modules**. Order yours today at: **www.cmor.org**.

Education on Demand is the only resource that makes sure you get the education you need when you need it. View past Webinars and watch conference presentations all from the convenience of your computer at a time that is right for you. Visit EOD today at: **www.mra-net.org.**

Authentic Response has hired **Peter Brownstein** and **Shane Abel** as Regional Sales Directors.

U.K. Data Analysis company **Framework**, has opened a U.S. office.

MRA
Marketing Research Association

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Glastonbury, CT 06033
www.mra-net.org (860) 682-1000

Upcoming Events

Nov. 3-5, 2008: MRA Fall Conference and RIF
JW Marriott Las Vegas Resort & Spa, Summerlin

Feb. 9-11, 2009: MRA CEO Summit
Atlantis, Paradise Island, The Bahamas

June 3-5, 2009: MRA Annual Conference and RIF
Marriott Chicago Downtown

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