

Overview
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2013 Market Research Supplier Satisfaction Survey September, 2013

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Research Methodology

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- Market research professionals were selected and invited by email to participate in an online survey sponsored by MarketResearchCareers.com.
- To heighten data quality, participants were required to complete the survey in a single session employing a one-time use, authenticated URL (preventing forwarding and “ballot box stuffing”). Furthermore, participants were unable to return to previous questions in the survey.
- Acquiring the opinions of 525 market research professionals, the aggregate data have a tolerance (error interval) of +/- 4.3% at the 95% confidence level.
- The survey was conducted between August 14 and August 30, 2013 and obtained a completion rate of 68.2%.
- This survey builds upon and supplements the insights from the prior four years.
- The “Opportunity Map Analysis” employs stated importance and satisfaction measurements for displayed attributes.

Statistical Significance throughout the Report:

** Means statistically different at the 90% confidence level*

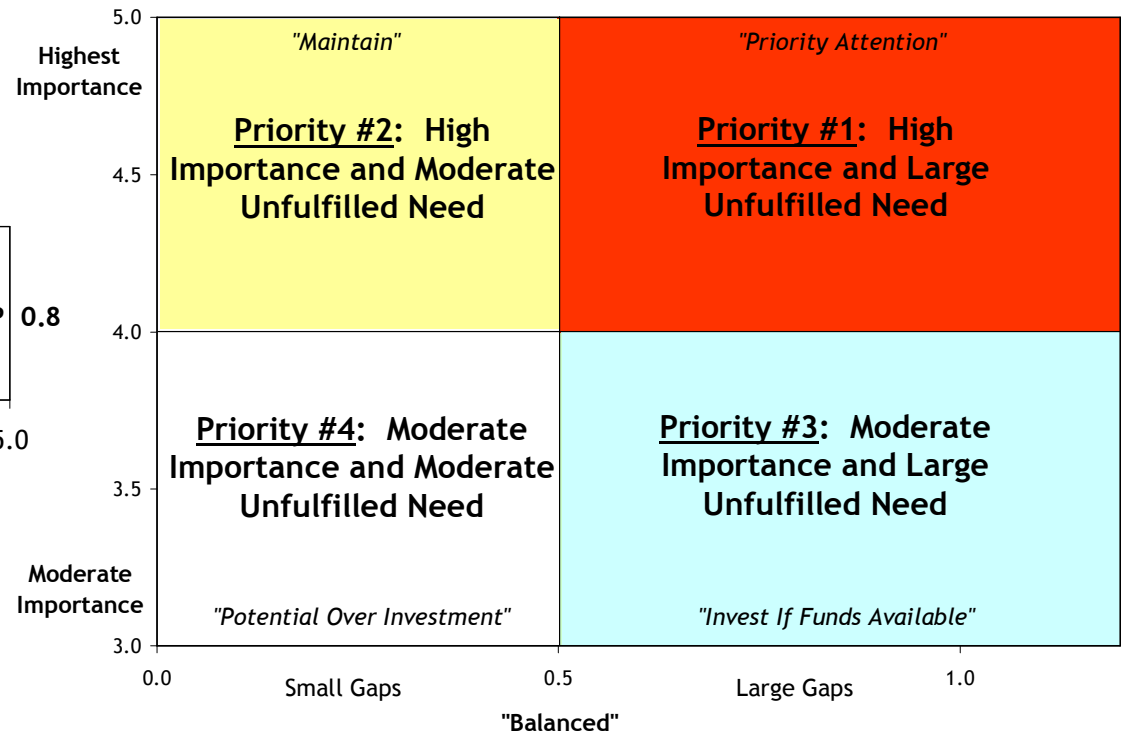
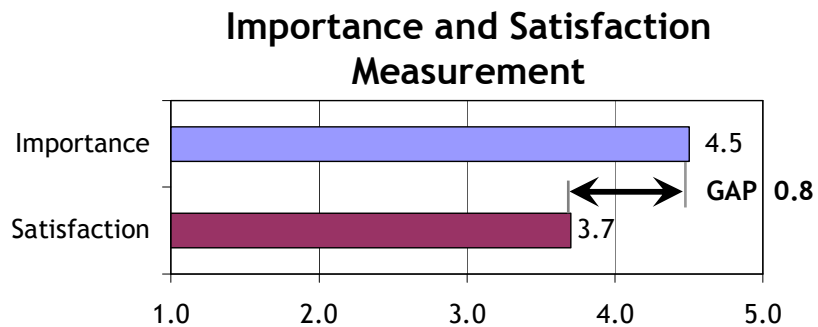
*** Means statistically different at the 95% confidence level*

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Research Methodology: GAP and Opportunity Analysis

- The quadrant analysis uses stated importance and stated satisfaction levels for evaluated attributes. The difference between these measurements for each attribute is the GAP—or the level of unfulfilled need.
- The importance and GAP for each attribute are then plotted on the graph below revealing improvement priorities.

Example Opportunity Map



Gap = Importance - Satisfaction

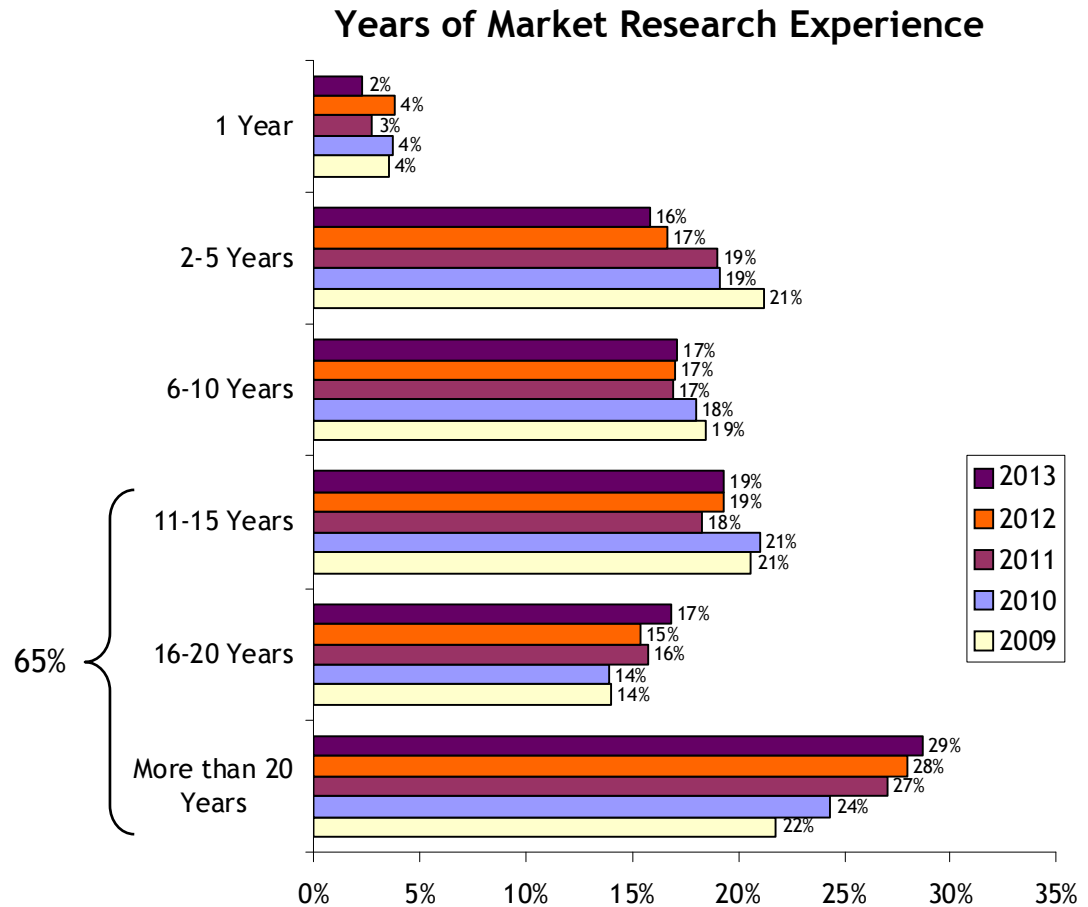
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Participant Profile

Market Research Experience

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- Similar to prior years, nearly two-thirds (65%) of all participants have more than 10 years of experience conducting or directing market research.

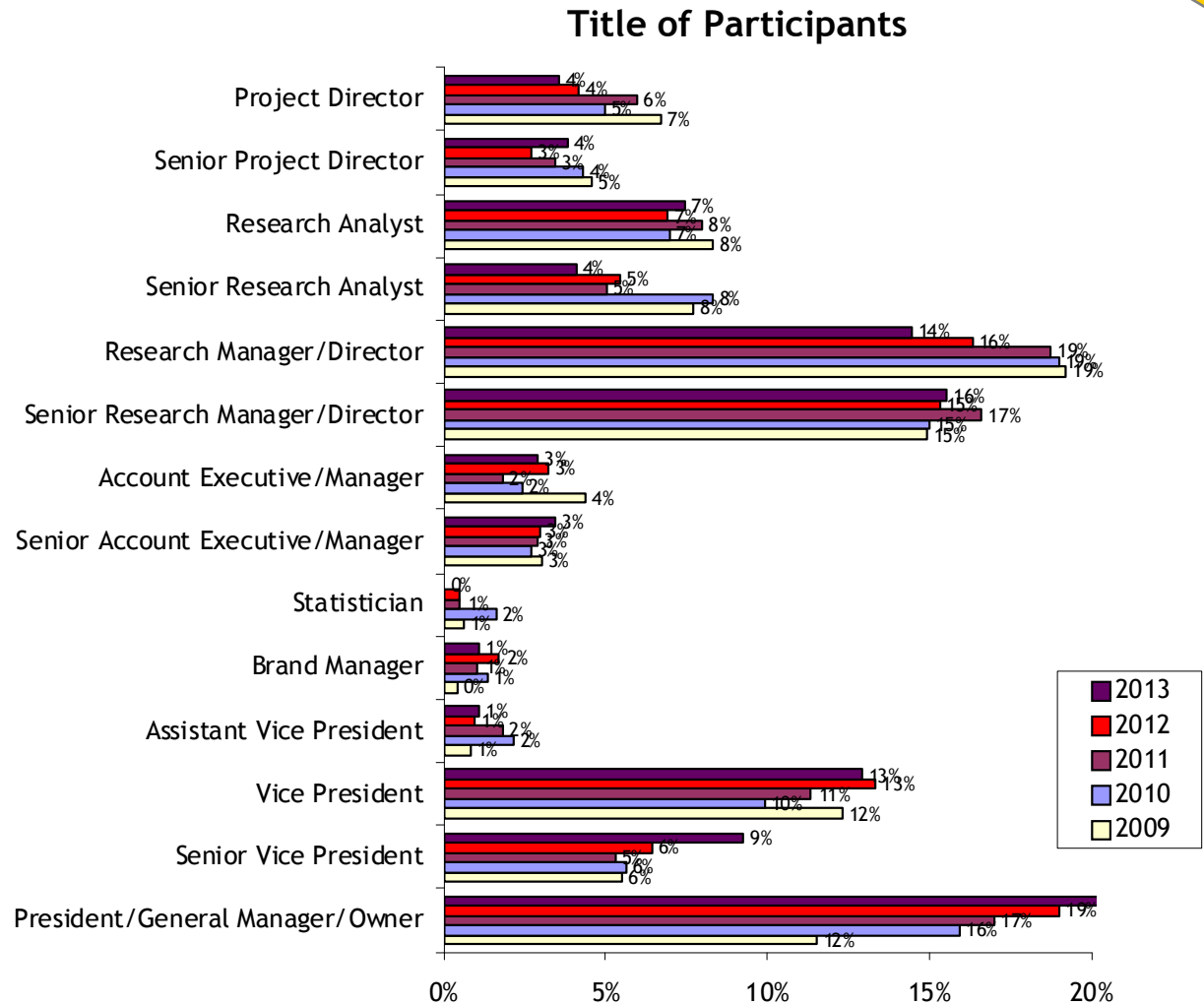


Q: How many years have you been conducting or directing the conduct of market research? (Select one) N=525

Market Research Title

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- As in previous years, nearly one-third (30%) of all participants are Research Managers, followed by Vice Presidents (23%), Research Analysts (11%), Owners/GMs (20%), and Project Directors (8%).



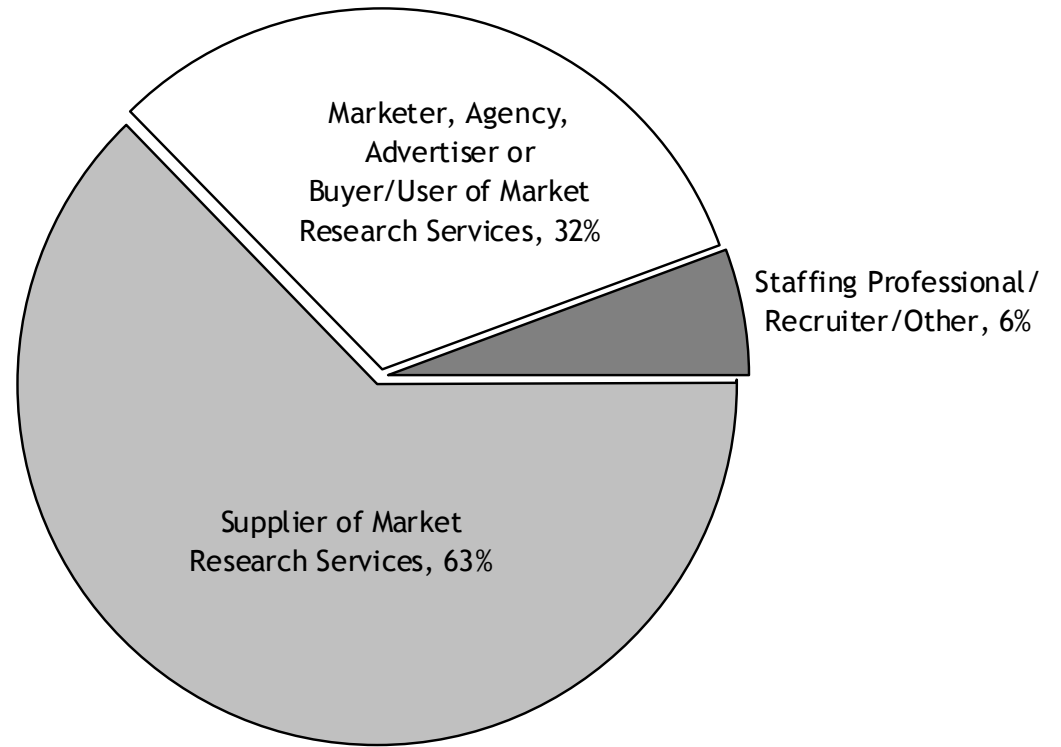
Q: Which of the following best describes your title? (Select one)

Industry Role

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- Nearly two-thirds (63%) of all participants work for a market research supplier—with one-third (32%) working on the ‘client’ side.
- The balance (‘Other’ and recruiters) work or support various market research functions across many industries.

Role of Participants

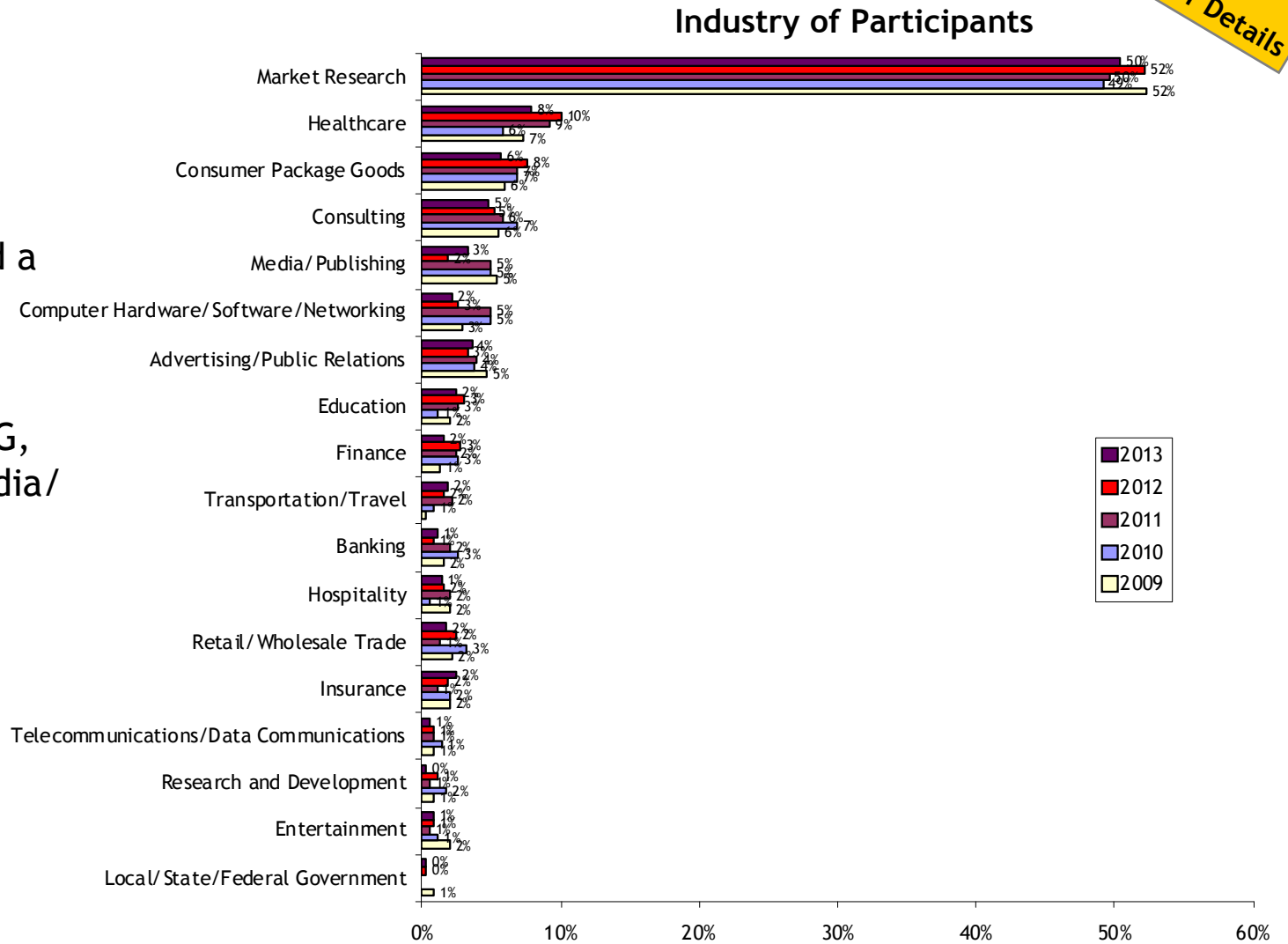


Q: Which best categorizes your company’s participation within the market research industry? (Select one)

Industry Sectors

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- Beyond MR professionals working in the industry, the survey included a selection of industries including healthcare, CPG, consulting, media/publishing, and others.



Q: In which industry does your company operate? (Select one)

Company Demographics

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- Nearly two-thirds of all participants (60%) work for companies with 500 or fewer employees.

- Similarly, half of all participants work for companies with known annual revenues of \$100MM or less.

Total Number of Employees

Number of Employees	2009	2010	2011	2012	2013
1 to 50	29%	33%	33%	34%	34%
51 to 100	11%	10%	10%	9%	10%
101 to 500	17%	12%	17%	15%	16%
501 to 1,000	7%	10%	8%	7%	6%
1,001 to 5,000	15%	10%	10%	10%	13%
5,001 to 50,000	11%	14%	15%	16%	13%
More than 50,000	7%	8%	6%	7%	7%
Not Sure	3%	2%	3%	2%	2%

} 60%

Annual Revenue

Revenue	2009	2010	2011	2012	2013
Less than \$1M	10%	15%	16%	17%	16%
\$1.0M to \$10.0M	19%	19%	17%	18%	18%
\$10.1M to \$100.0M	20%	17%	17%	17%	18%
\$100.1M to \$500.0M	8%	11%	8%	8%	8%
\$500.1M to \$1.0B	4%	4%	3%	5%	4%
\$1.1B to \$5.0B	9%	10%	9%	11%	10%
More than \$5.0B	9%	10%	11%	9%	9%
Not Sure	20%	15%	18%	16%	16%

} 52%

Q: In total, how many people work in your company? (Select one)

Q: What is the annual revenue of your company? (Select one)

About MarketResearchCareers

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The screenshot shows the homepage of MarketResearchCareers.com. At the top is the logo and a navigation menu with links for 'For Job Seekers' (Job Search, Post Resume, Create Job Agent, Update Profile, Free Downloads, Contact Us) and 'For Employers' (Post Jobs, Search Resumes). Below the menu is a main heading: 'We have the most market research jobs by employers and recruiters for resume holders'. A secondary navigation bar includes links for 'Employer Advantages', 'Employer Pricing', 'Client Testimonials', 'MR Industry Overview', '2013 Survey of MR Professionals', 'Job Descriptions and Salaries', 'Market Research Job Hiring Process', and 'Site Map'. A welcome message states: 'Welcome to MarketResearchCareers, the first and only career website within the United States focusing exclusively on the market research industry.' To the left is a photo of three professionals in a meeting. To the right is a 'LOGIN HERE' section with radio buttons for 'Job Seeker' and 'Employer', fields for 'Username' and 'Password', and a 'LOGIN!' button. Below the login section is a 'Market Research News' sidebar with several article titles and dates. At the bottom, there is a section titled 'Some of our clients' featuring logos for Altria, Bayer, BlueCross BlueShield, CISCO, harris INTERACTIVE, Heinz, Ipsos, L'OREAL, iTargetTools, MasterCard, and REEVE ASSOCIATES. A footer contains links for 'Feedback', 'Privacy', and 'Common Market Research Titles/Glossary'.

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