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Danuta Babińska, Aleksandra Nizielska

INTERNATIONAL MARKETING RESEARCH ON THE MARKETS OF CENTRAL AND EASTERN EUROPE

Introduction

The purpose of the article is to present the evolution and development directions of international marketing research in the markets of Central and Eastern Europe. The particular subject of interest are the determinants of research development in the region, the description of major research providers and research areas, as well as showing major tendencies in the scope of the methods and research instruments used.

The entrance of international corporations into the region in the beginning of the nineties, for which marketing research has been the very base for decision making, to a large extent influenced the introduction of Western research chains and the dynamic growth of the research market in the region. At present also the expansion of companies originating from the CEE region often occurs based on professional market research. The article tackles the issues of possibilities regarding conducting marketing research in the CEE region from the point of view of socio – cultural and infrastructural conditions, as well as broadly understood research potential.

1. Foregin investors' interest in the CEE markets and its consequences for the development of the research industry in the region

Many international companies are facing the challenge of researching the fast changing markets of Central and Eastern Europe, and trying to interpret the results of their market research project in this region, compared with those from other parts of the world. Those multinationals who traded in the CEE well before the fall of communism already learned that this is a complex region with a rich mix of cultures an traditions. This diversity presents enormous marketing challenge, including the necessity to adapt advertising, packaging and even recipes to local conditions. In most of the CEE countries the veneer of western superiority fell within a couple of years of the fall of the Berlin Wall and competition with local brands was reinforced by ethnocentric behavior in case of some product categories.

Since the nineties it has been possible to observe foreign investors' growing interest in the Central and Eastern European markets. Such a situation stems from different factors and there are different attractiveness criteria of the markets in question (Stawicka, 2007). According to the most important attractiveness ratings, like those provided by Ernst&Young and A.T. Kearney, countries of this region combine properties of well developed economies, i.e. transparent legal framework, familiar commercial environment and educated and flexible labour force with rapid economic growth and low costs of labour observed in developing countries. On average, each investment project in Central Europe generates four times more jobs than in the EU-15 countries (IBRKK, 2007). A good position of Central and Eastern Europe as an attractttive region for foreign direct investment is translated into a number of mergers and takeovers observed in the countries in question. Foreign investors attracted to the region primarily engage in labour intensive industries such as the automotive industry, consumer electronics and service centers. As a consequence of reforms aimed at qualifying for European Union membership Bulgaria and Romania showed a significant improvement in their business environment scores and now they are displacing investment from leading locations such as Poland, Hungary and the Czech Republic.

Following the political opening in countries like Poland, the Czech Republic, Slovakia and Hungary the market research industry in the Central and Eastern European region started to evolve in the early 1990's. In the first years of operation research agencies specialised in opinion polls concerning important socio-political and economic problems as well as the evaluation of current political events. It was also the time when transnational corporations entered the region. For those companies marketing research was the very base of decision making, with the market being largely unknown as regards the habits and behavior of consumers. To a great extent it was those international companies that brought global research chains into the region (Sora, 2006). At present this region is still characterised by rapid pace of change and the market research industry is growing much faster than in case of the Western Europe economies (see Table 1 and Figure 1 for details).

Table 1

CEE market research turnover in the years 2002-2006
(in USD m – rounded figures)

Country	2002	2003	2004	2005	2006
Bulgaria	5	7	8	11	13
Czech Rep.	41	53	64	75	81
Hungary	39	53	67	70	70
Latvia	5	5	5	8	9.0
Lithuania	5	7	8	9	11
Poland	81	97	113	149	162
Romania	11	12	18	23	30
Russia	70	85	110	144	198
Slovak Rep.	8	12	14	17	19
Slovenia	5	12	14	15	16
Ukraine	12	18	21	25	33

Source: Based on: ESOMAR (2007).

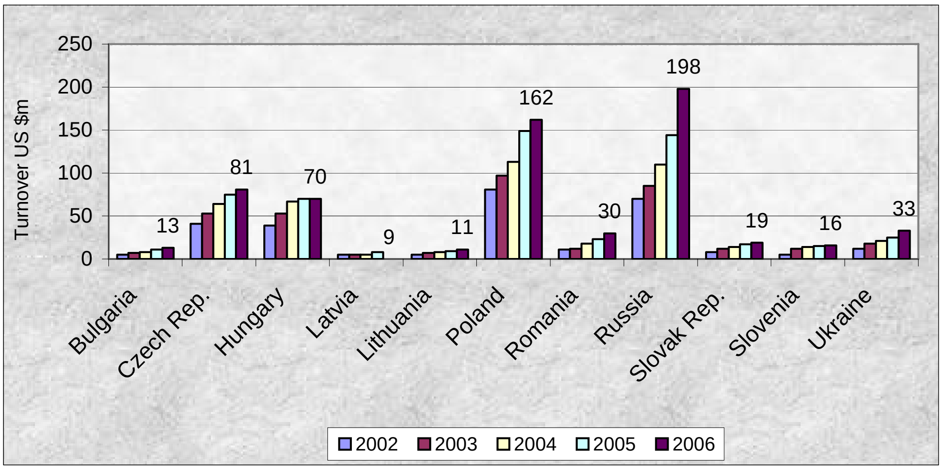

Figure 1. CEE market research turnover (2002-2006)

Source: Based on Table 1.

The most substantial growth of market research expenses may be observed in countries like Russia, Ukraine and Romania, where the turnover increased in 2006 by more than 30% in comparison to 2005. Russia, whose research sector is being boosted by rising demand from domestic fast moving consumer goods and retail clients, adding to the existing international client base, makes biggest year to year gains (almost 40% in 2006). In case of Hungary, Czech Republic, Poland and Slovenia the growth in 2006 was the slowest in the region – below 10%. These countries enjoy a stable growth of mature research markets, where dilemmas of research agencies get more sophisticated, like whether still engage in a "full service range" (which is presently provided by majority of research organisations in the region) or whether to specialize in certain sectors or methodology.

The major part of the turnover of the research industry, both in Europe, and in the CEE countries in particular, belongs to transnational corporations, which is the result of research spending structure. The FMCG producers commission around 40% of the total research turnover. The other two important sectors for marketing research are the financial services sector and telecommunications. The international corporations often coordinate market research projects in smaller CEE markets, like Slovakia, from their regional headquarters in bigger CEE countries (Rak, Chmelikova, Atari, and Galica, 2007). Because of high level of standardization of marketing management procedures, the transnational corporations have quite similar information needs in each country, where they conduct marketing activities. The result of this is applying the same research products in many countries, offered by the same research agencies, which enables the comparability of marketing action efficiency. This approach, however convenient for the corporations in question, may result in ignoring certain differences in the habits and attitudes among consumers in the CEE, which undoubtedly do exist.

2. Specificity of conducting marketing research in the CEE countries

Taking into consideration the specific features of conducting research in the CEE region one may first analyse the subject from the point of view of primary versus secondary sources of information.

Secondary data are a key source of information in international marketing research due to their ready availability, relatively low cost and their usefulness in providing background information relating to a specific country or industry (Craig and Douglas, 2005). Therefore high quality desk research is an important part of most international market research studies. This is not just to ensure that the existing knowledge of the topic is properly understood, but also to identify potential data sources and get insights and perspectives from external sources. There are two key issues to underline when taking into account the context of secondary data research in the CCE countries. First of all the data in many internationally accepted databases in Central Europe and Eastern Europe is much less detailed than in the West. Secondly English language desk research is not enough. Many databases are not available in English and relying on English alone will not be sufficient (Lucas, 2006). For example desk research in Russia is a difficult art to master. State and customs statistics are distorted while other public sources of information are scarce and unreliable. Expert interviews must accompany desk research for this reason. Income cannot be used as a screening question in a country where a significant part of the income is hidden from the tax authorities and people are not properly protected from criminals and extortionists. Instead, researchers ask what people own, consume, or can afford. Desk research can be done well at a reasonable cost by those who know the local languages and have experience and knowledge of doing projects, and know the data sources available in them.

In most CEE countries the majority of market research turnover comes from domestic clients – about 70-80% (see Table 2 for details). The exception are research agencies from Ukraine and Russia, where 70% and 50% of clients respectively are international. In Russia this stems from the fact that many big local manufacturers already have experience in effectively using research results, and their professionalism is at the same level as that of multinational corporations. On the other hand, many smaller companies confuse market research with direct marketing or consulting. They often expect research companies to provide them with lists of potential clients, detailed information about their competitors, or a business plan.

Table 2

Market research industry turnover in the CEE – domestic versus international clients

Country	Domestic clients (%)	International clients (%)
Bulgaria	65	35
Czech Rep.	80	20
Hungary	80	20
Latvia	82	18
Lithuania	70	30
Poland	86	14
Romania	87	13
Russia	50	50
Slovak Rep.	78	22
Slovenia	75	25
Ukraine	30	70

Source: Based on: ESOMAR (2007).

Proportions of expenditure by different type of client sectors remain largely unchanged throughout the past few years. The manufacturing sector clients contribute the most to the overall spend (on average 40%), with the dominant industries being FMCC, durables & electronics, pharmaceuticals and automotive. The remaining important sectors are the public sector, financial services and the media (see Table 3 for details).

Table 3

Proportion of spending by different types of clients (%)

Country	Manufacturing	Busines-to--Business	Wholesale and retail	Financial services	Utilities	Public sector	Media	Advertising agen-cies	Research institutes	Other
Bulgaria	58	3	1	9	15	3	5	2	1	3
Czech Rep.	42	3	7	13	10	5	8	4	5	3
Hungary	44	5	5	4	12	6	16	3	4	1
Latvia	22	4	6	6	6	22	13	7	5	9
Lithuania	15	10	5	8	20	15	20	2	5	0
Poland	54	1	5	5	9	5	10	4	5	2

Romania	51	7	2	4	10	10	5	3	7	1

Table 3 continued

Russia	50	5	3	3	7	5	13	5	2	7
Slovak Rep.	29	3	5	14	17	6	16	4	5	1
Slovenia	39	2	8	3	5	3	17	10	9	4
Ukraine	61	8	6	0	7	3	9	6	0	0

Source: Based on: ESOMAR (2007).

As far as direct research methods are concerned there are certain trends to be observed. The quantitative methods of data collection are dominant, constituting from 72% to 85% of total research among the new CEE members of the EU (see Table 4). With the exception of Slovenia face-to-face interviewing seems to be the predominant way of contacting CEE respondents. In the world structure of quantitative research face-to-face interviewing is giving way to telephone and on-line research, while all survey techniques are becoming more and more computer assisted (the development of CATI, CAPI and CAWI techniques).

Table 4

Proportion of turnover allocated to research methods in selected CEE countries (%)

Country	Quantitative						Qualitative				Other
	Postal	Telephone	Face-to face	Online	Other quantita-tive	Total quantitative	Group discus-sions	In-depth inter-view	Other qualitative	Total qualitative	Other
Bulgaria	2	12	62	5	0	81	16	2	0	18	1
Czech Rep.	1	17	45	3	15	81	11	3	1	15	4
Hungary	5	18	41	2	6	72	–	–	–	12	16
Latvia	1	17	40	1	26	85	9	3	0	12	3
Lithuania	1	10	63	1	0	75	16	4	0	20	5
Poland	0	13	43	1	16	73	19	4	2	25	2
Romania	0	12	71	1	0	84	9	3	1	13	3
Russia	0	28	40	2	0	70	12	9	4	25	5
Slovak Rep.	1	17	53	1	11	83	14	2	0	16	1
Slovenia	7	19	18	3	33	80	10	3	0	13	7
Ukraine	0	7	36	1	22	66	9	5	0	14	20

Source: Ibid.

Although Internet usage has soared between 2000 and 2007, with the growth of 410% in Czech Republic, 326% in Hungary and 307% in Poland online research takes only modest place among research methods applied in the CEE markets, with the proportion of such research not exceeding 3% (with the exception of Bulgaria). Theoretically Internet research seems to have biggest potential for growth, but it is probably going to be more balanced than it was expected and the mass migration of research into Internet is not so likely in the next few years (Śmiłowski, 2008). It seems that those research agencies, which invested a great deal in CATI and CAPI infrastructure are not so eager to promote online research, although this kind of research is being offered. Modest popularity of Internet research may also be the consequence of clients' reluctance towards these techniques (resulting from the sample not being in many cases representative, the possibility of the same respondent occurring in the research for several times, aversion towards novelties and so on). Besides the remuneration of interviewers in the CEE region in comparison to more developed countries is still relatively low, thus making Internet research less attractive.

The CEE companies have devoted most of their research budget to ad hoc studies. Increase in the interest in such studies means that clients' expectation towards market research change. The CEE companies expect, to a bigger extent, than just a few years ago, the research to be "tailored made" and adapted to their individual needs (see Table 5).

Table 5

Proportion of spending on different type of research design (%)

Country	Ad hoc	Omnibus	Panel	Other continuous	Other type of research
Bulgaria	53	12	20	15	0
Czech Rep.	59	4	21	12	4
Hungary	53	18	21	4	4
Latvia	54	10	16	18	2
Lithuania	73	15	10	2	0
Poland	70	2	9	11	8
Romania	58	3	20	15	4
Russia	69	5	17	7	2
Slovak Rep.	46	9	20	21	4
Slovenia	39	8	27	16	10
Ukraine	51	3	34	10	2

Source: Ibid.

The countries where ad hoc research was the dominant type in 2006 were Lithuania (73%), Poland (70%) and Russia (69%). Panel research was most popular in Ukraine (34% of the research budget), Slovenia (27%), Czech Republic and Hungary (21% each). As far as Omnibus research is concerned the biggest amounts were spent by Hungary (18% of the research budget), Lithuania (15%) and Bulgaria (12%).

In comparison to the countries of Western Europe CEE respondents are still more eager to take active part in market research, however the acceptance to participate in research is on the fall. There are actions taken to change this state of affairs and one of the examples is the one Polish Association of Public Opinion and Marketing Research Firms (OFBOR) started in September 2005. It has initiated "Your opinion matters" program, whose main aim was to explain the role of research in the contemporary society and economy, strengthen the public trust towards market research and to encourage the Poles to take part, by showing the influence of research results on the surrounding environment. This program has no precedent in Europe; a similar initiative has only been realised in the USA.

However, the propensity for taking part in the research depends largely on the research technique and is significantly culture-bound. For example in case of interviews with senior executives in Russia doing telephone interviews can be extremely difficult as there is no culture of giving away information to people you do not know. Face-to-face interviews can, on the contrary, be quite productive but the costs in a country as large as Russia can be considerable.

3. Major trends in commercial research of the CEE region

Since the opening of the Central and Eastern European economies to international business in the early 1990s, the region has not only attracted increasing amounts of foreign direct investment and international trade; it has also attracted a significant amount of academic and commercial research. With regard to academic research the initial works on CEE countries focused on understanding the peculiarities of the transition economy context, or testing the validity of mainstream theories in a new, emerging context. As time progressed, scholars have altered their research strategies to focus on adapting existing theories to that unique context and phenomena, or to develop new theories to explain international business activities in the transition context (Gelbuda, Meyer, and Delios, 2008). As an excellent review on trends in business and management research on CEE markets can be found in a recent article by A. Schuh and A. Rossmann (Schuh and Rossmann, 2007) this section is devoted mainly to major trends in commercial research of the region in question.

The ESOMAR industry report on market research presents the list of the world's top 25 market research firms, of which the first 15 are presented in Table 6. The global research industry is characterized by intense consolidation process, led by the need to satisfy the demands of global clients, who have increasingly global research requirements. For example in 2006 there were 60 transactions globally, with 28 involving the top 25 firms and in 2005 – 88 transactions, with 50 among the top 25. Behind this consolidation lies the fact that only firms of size and scope can satisfy the need for more and more sophisticated research products that work in a global environment.

It should be noticed that only 7 out of the top 15 research organizations presented in table 6 conduct their activities on Central and Eastern European markets. These are mainly European companies: Taylor Nelson Sofres Plc., The Kantar Group, GfK AG, Ipsos Group S.A. and Synovate, only the first two – The Nielsen Company and IMS Heath Inc. originate from the USA. The remaining American companies as well as the Japanese research organisations have not yet expanded their activities on the CEE markets. This situation, according to the market's experts, is likely to change soon, with the Japanese companies expressing raising interest in conducting their activities in the region.

Table 6

The presence of the top 25 Global Research Organizations in CEE countries

Rank 2006	Organisation	Headquarters	Parent country	CEE countries
1	The Nielsen Company	New York, N.Y.	USA	Belarus, Bulgaria, Croatia, Czech Republic, Hungary, Latvia, Lithuania, Poland, Romania, Russia, Slovakia, Slovenia, Ukraine
2	IMS Health Inc.	Norwalk, Conn.	USA	Belarus, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovak Republic, Slovenia, Ukraine
3.	Taylor Nelson Sofres Plc.	London	UK	Bulgaria, Czech Republic, Hungary, Estonia, Latvia, Lithuania, Poland, Romania, Russia, Slovakia, Ukraine
4.	The Kantar Group	London & Fairfield, Conn.	UK	Croatia, Hungary, Poland, Slovenia
5.	GfK AG	Nuremberg	Germany	Bulgaria, Croatia, Czech Republic, Hungary, Latvia, Lithuania, Poland, Romania, Russia, Slovakia, Slovenia, Ukraine
6.	Ipsos Group S.A.	Paris	France	Czech Republic, Hungary, Poland, Romania, Russia, Slovakia, Ukraine
7.	Synovate	London	UK	Poland, Russia
8.	IRI	Chicago, I.	USA	–
9.	Westat Inc.	Rockville, Md.	USA	–
10.	Arbitron Inc.	New York	USA	–
11.	INTAGE Inc.	Tokyo	Japan	–
12.	J.D. Power & Associates	California	USA	–
13.	Harris Interactive Inc.	Rochester, N.Y.	USA	–
14.	Maritz Research	Fenton, Mo.	USA	–
15.	The NPD Group Inc.	Port Washington, N.Y.	USA	–

Source: Ibid.; www.nielsen.com, www. imshealth.com, www.tns.global.com, www.kantargroup.com, www.arbitron.com, www.intage.com, www.ipsos.com, www.gfk.com, www.npd.com, www.maritz.com, www.westat.com, www.synovate.com, www.infores.com, www.jdpower.com, www.harrisinteractive.com.

Not all the biggest research organisations present on the CEE markets occupy the strongest position within the countries' internal rankings. For example, comparing the ESOMAR list with top research organisations present on the Polish market it is interesting to observe that among the global organisations like MB SMG/KRC (a part of the Kantar Group), Nielsen, GfK, IPSOS, Taylor Nelson Sofres and Synovate domiant positions are also taken by local research providers like IQS and QUANT Group and PBS DGA.

As the process of EU integration continues the consumers from Central and Eastern Europe are becoming more and more interesting for the world top market research organizations. For example The Roper Reports Worldwide study run annually since 1997 by GfK NOP, part of the GfK Group, includes a number of Western European markets as well as several Central European markets and Russia. The results of the 2005-2006 study show that consumers in CEE markets such as the Czech Republic, Poland and Russia, while undoubtedly retaining their unique local cultures and identities, are becoming increasingly similar to markets in Western Europe. This convergence gives the multinationals huge opportunities for new markets to sell to (though it is worth pointing out that the opportunities go in both directions). At the same time the uniqueness of these local markets means that multinationals need to tread carefully before rolling out products and marketing strategies that were successful in one individual Western European country to CEE markets. The inclusion of CEE countries into The Roper Reports suggests an attempt to describe this region in the form of coherent, homogeneous segments, yet indicating some crucial differences in the mentality of particular nations. Having in mind that not so long ago this part of Europe was treated as "post-communist block" by multinationals opening their subsidiaries in the region, it seems to be a very positive sign (Wódkowski, 2007).

As it has already been indicated, apart from global players the CEE market research industry also includes local research providers, that are struggling to gain competitive advantage through offering in-depth knowledge of the specific conditions in Central and Eastern European countries. Employing a case research approach, a methodology further described by L. Żabiński (Żabiński, 2008). This article presents activities undertaken by the PMR company on the CEE markets. The case research includes information coming from both: secondary and primary sources of information. Desk research involved reviewing the PMR website publications, whereas field research focused on the in-depth interview with one of the PMR managers.

PMR is one of the leading companies that operate on the Polish market and that deal with marketing research on the Central and Eastern European markets. The company is divided into two sectors: PMR Consulting and PMR Research, was established in 2000 and is based in Kraków. The company is a specialised branch of the British and American company called PMR Ltd. that is concentrated on providing companies that are interested in investments on the Central and Eastern European markets with market information and consulting services. Core areas of the PMR Ltd. business include strategic consulting aimed at foreign direct investment including mergers, takeovers and greenfield investments. The company also specialises in searching for alternative suppliers, trading partners and sub-contractors for concerns that expand their activities entering the Central and Eastern European markets. PMR Research offers a complete range of research services including elaboration of sector analyses. The company is present in Poland and on the Central and Eastern European markets including Bosnia and Herzegovina, Bulgaria, Croatia, the Czech Republic, Montenegro, Estonia, Lithuania, Latvia, Macedonia, Poland, Romania, Russia, Serbia, Slovakia, Slovenia, Ukraine and Hungary. Moreover, PMR Research carries out their research on other world markets like, for instance, Germany, France, Spain, the Netherlands, Great Britain, USA and Turkey. PMR customers include the largest companies active in Poland and all over the world including, inter alia, BP, Gillette, Henkel, IBM, Ikea, Microsoft, Nokia, Novartis, Philips, Procter & Gamble, Siemens, Telekomunikacja Polska, Tesco, and Unilever. PMR completes approximately 250 research and consulting projects annually. The PMR research experience mainly stems from the retail trade market, fast moving consumer goods, the pharmaceutical sector, telecommunications, information technologies and construction. In their activities PMR research puts much emphasis on communication with their customers. PMR employees highlight that realisation of international projects is only possible as a result of co-operation with foreign partners.

In order to identify specifics of the marketing research realisation on the Central and Eastern European markets an in-depth interview with one of the company managers was carried out. The article authors were particularly interested in the company co-operation with foreign partners undertaken while carrying out research on the international markets. In case of the PMR company, a majority of research is carried out by local employees (in Poland 75 people are employed). They represent 20 nationalities, which is a great asset in all activities undertaken by the company, as all employees are well familiarised with local languages and specifics of particular foreign markets subject to research. However, as a result of the fact that not all research can be carried out in-company, PMR made a decision to co-operate with partner companies in each country targeted. PMR has their sub-contractors in Central and Eastern Europe, Western Europe and in China. As far as particular stages of the research procedure are concerned, it is necessary to stress that research projects and research tools (including translations required) are created by the PMR employees. However, foreign partners are only responsible for carrying out field research (in a majority of cases by means of direct or in-depth interviews) and for elaborating the so-called "call reports", i.e. records of particular conversations in their native languages. Employees in Poland deal with translating the research results, analysing data and preparing the very report.

PMR functions on the market either as a company that realises research for their own international customers or as a sub-contractor of other research companies. Company customers predominantly include large global companies with whom PMR jointly create research projects. Approximately 50% of the research undertaken is contracted by small individual customers. The other 50% comes from research companies. In case of individual customers, PMR is contacted by market development and business development managers who are interested in obtaining a complete picture of a particular foreign market including both close and remote environments.

In case of PMR, street interviews and telephone interviews are the most frequently applied research quantitative methods (PMR has a professional CATI studio). However, in case of qualitative methods, PMR prefers in-depth interviews with experts representing particular branches. Some attention was paid to the fact that PMR specialised in researching into industrial goods including, for instance, construction materials and in this context interviews were mainly carried out with individuals responsible for selling and distributing of the goods in question. The PMR employees representing different nationalities carry out telephone interviews with particular respondents in the respondents' native languages.

The PMR employees do not see any remarkable differences in carrying out research on particular Central and Eastern European markets. It was emphasised that the telephone interview technique was the most frequently applied – 70% of all research carried out. PMR rarely applies direct interviews as a result of high costs involved and long time of data acquisition.

Some attention was paid to the fact that the cost of any research carried out was largely influenced by differences in telephone conversation charges in particular countries. However, there are no special differences in costs borne by sub-contractors whose budgets are fixed similarly. Taking infrastructural differences into consideration, the PMR researchers identify the major problem in the area of internetisation of particular Central and Eastern European markets. It was noticed that the level of preparing websites in Hungary, Romania or Bulgaria was much lower than in case of Poland.

The researchers were interested to find out how many foreign markets a particular company targets to carry out simultaneous research. It turns out that research is rarely performed on one foreign market only. In a majority of cases approximately five foreign markets are simultaneously analysed to find out which of them enjoys the greatest potential for foreign investment.

The clients, including English, American and German companies in particular, do not pay much attention to differences between countries of Central and Eastern Europe, thus perceiving the countries in question as one region. This seems to be in line with A. Schuh's view, that in order to understand the behavior of MNCs in the emerging markets of CEE and the fundamental changes in market structures there today, the global marketing conception seems to be the more appropriate explanatory framework (Schuh, 2007). It is however possible, that companies like PMR could "teach" their clients the specifics of particular countries of the targeted region.

Another interesting example from Poland is a local market research company Inquiry, which since July 1st, 2008 became a regional representative of One Planet One Call, Inc, a global data collection network, with headquarters in Cincinnati, USA. At present Inquiry is responsible for the coordination of research in Poland and other CEE countries.

In any attractiveness rankings CEE countries appear to be particularly appreciated by transnational corporations. This in turn leads to greater interest in various aspects of consumption patterns and applicable business models. Both academics and commercial research companies express this interest, in some cases even joining efforts. However the specificity of conducting marketing research in the CEE markets is not yet well described. Yet the rapid development of research industry in the region and the rising quality of the service offer to some extent makes business operations there more stable and predictable.

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