QUIRK'S
Marketing Research Review

Special markets issue

> Getting tweens to notice your brand

> Interviewing and measuring the GLBT market

> Boomers need a marketing hug

Research software

> A look at what's hot and what's not in the MR software industry

2004 Marketing Research Software Directory

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Volume XVIII Number 2

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Is vitamin usage a global phenomenon?

Figures from TGI Global reveal some dramatic variations in the number of people taking vitamins and supplements worldwide. Results from 15 studies show vitamin usage to range from 58 percent of people in Sweden to as little as 7 percent in Malaysia.

Surprisingly, there are no obvious regional trends when it comes to taking vitamins. Looking at Western Europe, there is a notable difference in levels of vitamin usage between Great Britain (43 percent) and Spain (8 percent). The same story can be seen in Latin America, where 41 percent of Colombians take vitamins versus 15 percent of Argentines.

There could be a number of fac-

tors which contribute to high vitamin intake in certain countries. One reason is that not everyone has the time or opportunity to observe a balanced diet. In the U.S. for example, where 53 percent of the total population claim to take vitamins or supplements, 41 percent of people agree with the statement "because of my busy lifestyle, I don't take care of myself as well as I should."

Another reason for high levels of usage in these countries may be that recent years have seen a major shift in consumer attitudes towards health care. In Sweden, 33 percent of people also say that they are also interested in alternative health care, suggesting that consumers there are taking increasing responsibility for treating themselves.

In countries where usage isn't quite so high, the scope of the vitamin and supplement market is still significant. In Russia, where just 14 percent of people actually take vitamins, 57 percent of people agree with the statement "taking vitamins is the best means of preventing illness" - which suggests that there is huge market potential.

Looking at demographics, women are more likely than men to be vitamin users in all countries. In Israel, for example, 39 percent of women take vitamins compared with just 21 percent of men. In most cases vitamin usage seems to increase with age. However, in Sweden, Hungary, Russia and Spain the younger age groups are more inclined to take vitamins. In Sweden, 62 percent of 18-34-year-olds take vitamins, compared with 55 percent of people over 55. These figures may well indicate a further surge in consumer demand for vitamins and supplements going forward. For more information visit www.tgisurveys.com.

Gay consumers prefer equality-minded companies; are avid media-users

According to a national consumer survey by Witeck-Combs Communications, Washington, D.C., and Harris Interactive, Rochester, N.Y., gay, lesbian and bisexual (GLB) individuals consider equal treatment of gay employees in the workplace as the third- or fourth-most compelling reason (depending on the product) to favor one company over another when making purchase decisions.

The Witeck-Combs/Harris Interactive online survey asked respondents nationwide to identify the top reasons that mattered most to them in their buying preferences for several product categories including: banking, airlines, rental cars, discount retailers, audio electronics, automobiles, hotels, and personal computers and software.

All adults surveyed - gay and non-gay consumers alike - said that regardless of the product category, "convenience" and "friendly and welcoming customer service" were their top two answers in discriminating among companies, when price, quality and function are alike.

The findings reveal that GLB consumers are similar to other shoppers in most basics. Like all consumers, they weigh price, quality, convenience and service as primary considerations. However, between one fourth (24 percent) and one third (37 percent) of gays, lesbians and bisexuals (depending on the product category) also affirm that "equal treatment of all employees, including gays and lesbians, African-Americans and Hispanics" ranked as their third- or fourth-highest priority.

The findings also show that another top reason affecting consumer preference (again, with the specific ranking dependent on each product category) was whether a company reached out to gays and lesbians through targeted advertising. Between 13 percent (hotel

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I have the power to send you back to the drawing board.
-Greenfield Online panelist
High-quality research begins with high-quality respondents – which is why more and more research companies demand that Greenfield Online field their research projects. When you use Greenfield Online for your research data solutions, you get instant access to our robust panel of more than 1.7 million members that have been pre-recruited and opt-in 100% to participate in research studies. These high-value panelists yield high response rates which means better data for you and your clients. Greenfield Online has conducted more online research projects than any company in the world – we offer Full-Service Data Collection, Sample-Only and Program and Host Solutions. Power your research with our experience, our technology, and our people.
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names of note

Pete Krainik has joined New York-based *DoubleClick Inc.* as chief marketing officer.

Harris Interactive, Rochester, N.Y., has named **Robert E. Knapp** as its new vice chairman and chief executive officer. Knapp has assumed executive responsibility for management and direction of the company and has replaced CEO and founder **Gordon S. Black**, who will continue as executive chairman. The firm has also named the following to its board as independent directors: **George Bell**, president and CEO of *Upromise Inc.*; **Stephen D. Harlan**, partner in *Harlan Enterprises* and former vice chairman of *KPMG Peat Marwick*; **Antoine Treuille**, executive managing partner of *Mercantile Capital Partners* in New York; and **Dr. Subrata Sen** of *Yale University*. In addition, **Scott D. Upham** has been named senior vice president of the Automotive and Transportation Research (ATR) group.

The NPD Group, Inc., Port Washington, N.Y., has named **Luis Delahoz** vice president of sales for NPD Techworld, the company's technology tracking division. The firm has also named **Pamela Smith** vice president of client development for the NET service of NPD Foodworld and **Warren Solochek** vice president of client development for the foodservice side of NPD Foodworld.

Justin Edge has joined *Knowledge Networks*, Menlo Park, Calif., as managing director/senior vice president. He is based in the firm's New York office.

Cincinnati-based *Burke Inc.*, has named president **Michael Baumgardner** as president and CEO. Current CEO **Ron Tatham** is retiring after 28 years with the company. The management change will be effective October 1, 2004, the end of Burke's fiscal year. The firm also announced a number of other staff additions: **Sandip Narang** has been named senior account executive with its client services team; **Greg Van Scoy** has been named vice president of client services; and **Richard G. Miklautsch** has been named senior account executive. **Keith Kettle** and **Ravi Venkitaraman** have been promoted to senior vice president of client services. In the firm's Boston office, **Jodie McInerney** has been named vice president of client services. The firm also congratulates **Kunal Gupta**, senior consultant, linkage and integration services, on the completion of his doctoral degree.

Tatham George

NFO WorldGroup, Northwood, Ohio, has named **Chris George** group account director for NFO USA's northeast region.

James T. Medick, CEO and founder of *MRCGroup Research Institute*, a Las Vegas research firm, has been named market research executive of the year by *Research Business Report*.

Bothell, Wash.-based Ethernet networking firm *Allied Telesyn* has named **Todd Chipman** senior vice president of marketing. Marketing research will be among his new responsibilities.

Tenafly, N.J.-based research firm *Invoke Solutions* has named **Corey V. Torrence** as its new chairman and CEO. The company has also named **Simon Blanks** vice president of sales and channels, and **David J. Rubinstein** vice president of operations and customer care.

Affinnova, Inc., a Cambridge, Mass., product design and development firm, has appointed **Dr. John Hauser** to its executive advisory board. Hauser is the Kirin Professor of Marketing at the Massachusetts Institute of Technology's (M.I.T.) Sloan School of Management and also heads the Virtual Customer Initiative for M.I.T.'s Center for Innovation in Product Development. The firm has also named **H. Robert Hawthorne** to its executive advisory board.

Jennifer Steinberg has been promoted to facility director at *Focus Pointe Suburban Philadelphia*.

Bob Chua has been named head of the new Asia-Pacific regional office of Seattle-based *Global Market Insite*. The new office is in Sydney, Australia.

Target Research Group, Nanuet, N.Y., has named **David Buchler** senior vice president. In addition, **Larry Herman** has joined the company as vice president.

Peter Mills has been named Australian country manager and will manage the new Sydney, Australia branch office of Milwaukee-based research firm *Market Probe*.

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product and service update

New Web recruitment tool from InsightExpress

InsightExpress, a Stamford, Conn., online market research company, is now offering AdInvite, a way to invite Web users to share their opinions in online surveys. Developed for AdInsights, InsightExpress' online ad effectiveness measurement solution, AdInvite supplants traditional pop-up and pop-under invitations.

AdInvite does not require a download or plug-in, is not trapped by firewalls or computer-resident software, is supported by virtually all browsers, and operates with any Web publisher permitting rich media units.

AdInsights can operate using traditional invitation methods, AdInvite, or combinations of other approaches. AdInvite does not consume ad inventory, enabling publishers to measure the impact of an advertisement without foregoing revenue opportunities. For more information visit www.insightexpress.com.

New neighborhood classification system

ESRI Business Information Solutions, Redlands, Calif., is now offering Community Tapestry, which classifies U.S. neighborhoods into 65 segments based on socioeconomic and demographic composition. The segments are organized into 12 LifeMode summary groups with similar demographics and consumer patterns and 11 Urbanization summary groups with similar levels of density.

The Tapestry segmentation system reveals distinct new markets and provides a demographic and lifestyle picture of neighborhoods to help with site location analysis, marketing and sales planning, new product development, and more. Tapestry combines traditional statistical segment analysis methodology introduced over 30 years ago by the ACORN segmentation system with the latest ESRI BIS data mining techniques to produce a segmentation of U.S. neighborhoods.

For example, today's affluent markets include nonfamily households. The Laptops and Lattes segment is an example of nonfamily households and can be found mostly in major metropolitan areas. This segment is made up of singles with a median age of 38 who earn a median annual household income of more than $83,000 and still rent.

Tapestry also reveals contrasting income diversity between the top and bottom of the economic ladder. Top Rung, Tapestry's wealthiest market, has a median household income of $168,400, more than 3.5 times that of the U.S. median of $46,600. By comparison, City Commons, with a median household income of $14,700, is only one-third that of the U.S. median.

The nine senior segments in Tapestry illustrate the increasing age of the U.S. population; in one of these segments - The Elders - 79 percent of the householders are over 65 years. For more information visit www.esribis.com/tapestry.

Perseus issues mobile data collection app; updates SurveySolutions

Braintree, Mass.-based Perseus Development Corporation has released Perseus MobileSurvey, a new survey collection application to facilitate field-force automation. Perseus MobileSurvey is a PDA-based survey collection application, available for Pocket PC and Palm OS-powered devices. MobileSurvey provides the capabilities of Perseus SurveySolutions Web surveys on a handheld device, supporting all SurveySolutions question types and validations, as well as branching, piped answers and display of conditional choices. Survey authors can now deploy the same questionnaire as both a Web survey and as a PDA survey.

SurveySolutions with MobileSurvey enables survey administrators to monitor research results in real-time, with responses being collected from Web and handheld interviews simultaneously. Handheld survey results can be sent via HTTP to the Perseus Survey Processor running on a Web server.

The Survey Processor can store results directly to an SQL database, to a TSV file, or send the results by e-mail for collection by the Perseus SurveySolutions desktop. Results can be sent over TCP/IP to a Web server using the following technologies: via ActiveSync pass-through Internet connection (Pocket PC only); modem card; wireless network card; or wireless cell service with Internet connection.

To work around the small screen size of PDAs, MobileSurvey offers glossary support and an image library, enabling data collectors to view definitions and images associated with each question on separate screens.

Perseus has also released SurveySolutions 6, the latest edition of its Web-based survey software. In addition to its original three modules for questionnaire writing, results management and charting, SurveySolutions 6 now offers a new module dedicated to survey deployment, invitations and, in SurveySolutions Enterprise, master-panel management.

The new panel management system in SurveySolutions 6 Enterprise lets users create a survey panel (a subset of the master panel) based on criteria including the time since the panel member was last interviewed; the time the panel member was last invited to complete a survey; or other criteria known about the panel member (gender, age, title, etc.). Survey administrators are then able to actively track respondent participation throughout the survey process. For more information visit www.perseusdevelopment.com.

Socratic expands business focus

San Francisco-based Socratic Technologies has expanded its existing high technology and business-to-busi-

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research industry news

News notes

Netherlands-based **VNU** has signed an agreement to sell its **Claritas Europe** business to **Acxiom Corporation** for EUR 33.5 million. Closing was expected around year-end 2003. The company expects a book loss of EUR 25-30 million for the divestiture. VNU announced in January 2003 its intent to explore strategic options, including the possible sale, for its Claritas Europe business, as it operated with little synergy with the rest of VNU's Marketing Information business in the European marketplace.

Claritas Europe has nine offices in seven countries and is run independently from Claritas Inc. in the U.S., which remains part of VNU's Marketing Information group. Trade Dimensions and Spectra Marketing Systems, both part of Claritas Europe, will remain part of VNU's Marketing Information, as their activities are closely aligned with VNU's mainstream marketing information businesses.

Separately, the firm issued a trading update which included plans to shed almost 700 jobs over the next three years in its Marketing Information group, partly from natural attrition.

Acquisitions

London-based **United Business Media** has acquired **Eurisko**, a Milan, Italy-based market research company, for EUR 33 million. Through Eurisko, NOP World can now market its products directly into Italy and can offer a wider geographical presence to its clients. In 2002 Eurisko had revenues of EUR 28 million and EBIT of EUR 4 million. The purchase price represents 1.2 times revenue and 8.3 times EBIT.

NetRatings, Inc., Milpitas, Calif., has acquired a majority interest in **RedSheriff**, an Internet audience measurement firm. Under the terms of the agreement signed by NetRatings and RedSheriff's majority shareholder, Morgan Grenfell Private Equity Limited, as manager of various funds of Deutsche Equity Partners IV (MGPE), NetRatings has acquired MGPE's 58 percent stake in RedSheriff for approximately $12 million in cash. RedSheriff's shareholders agreement requires NetRatings to offer to purchase all remaining RedSheriff shares through a process that was expected to extend through the end of January. NetRatings anticipates purchasing additional shares and is prepared to acquire 100 percent of the company.

Alliances/strategic partnerships

San Francisco research firm **Socratic Technologies** has completed negotiations to enter into an expanded partnership relationship with **Greenfield Online**, Wilton, Conn. This agreement is a part of Socratic Technologies' 2004 strategic plan to expand its focus to include product development and branding work in the consumer products market.

Arbitron Inc., New York, has signed a license agreement with research firm **TNS** which gives TNS the right to use the Portable People Meter system and its audio encoding technology for radio and television audience measurement in selected countries in Europe, Asia-Pacific, the Middle East and Africa.

Opinion Research Corporation (ORC), Princeton, N.J., has formed a strategic alliance with **MarketBasics**, a Boston marketing research firm. MarketBasics will be a regional office in the Boston area for ORC as ORC seeks to expand its service offerings.

The Non-Food Tracking division of the **GfK Group**, Nuremberg, Germany, and **The NPD Group**, Port Washington, N.Y., are formalizing and gearing up their 20-year-long cooperative relationship. A new holding company will be set up to coordinate business in Europe, the Middle East and Asia. Retail research activities in the U.S., Canada, Mexico and part of Latin America will be offered and coordinated by NPD Intelect. The NPD Group holds 75 percent of the

Calendar of Events Mar/Apr

ESOMAR will hold its automotive marketing conference on March 1-3 in Lausanne, Switzerland in conjunction with the Geneva International Motor Show. For more information visit www.esomar.org.

The Council for Marketing and Opinion Research will hold its annual "Protecting Our Assets" respondent cooperation workshop on March 2-3 at the Flamingo Hotel in Las Vegas. For more information visit www.cmor.org.

The Market Research Society will hold its annual conference, Research 2004, themed "Welcome to The Dream Economy," at The Barbican in London on March 11-12. For more information visit www.mrs.org.uk.

ESOMAR will hold its Asia Pacific conference on March 28-30 in Shanghai. For more information visit www.esomar.org.

ESOMAR will hold its Excellence in Consumer Insight 2 conference on April 18-20 in Vienna. ESOMAR will also hold a forum on managing research for profit in Vienna on April 21. For more information visit www.esomar.org.

Anderson, Niebuhr & Associates will hold a questionnaire design and use workshop on April 29-30 in Orlando, Fla. For more information call 800-678-5577 or visit www.ana-inc.com.

shares in the company, with the remaining 25 percent held by the GfK Group. NPD Intelect anticipated sales totaling EUR 45 million for 2003. A new holding company is being established in Latin America to coordinate activities in Brazil, Chile and Argentina. GfK has a 65 percent stake in the company, with the other 35 percent of the shares being held by The NPD Group. The partners have also established a global coordination board to: develop global business policy; coordinate the relationship between clients and partners in the regional holdings concerned; and evolve a global service concept.

The Associated Press and **Ipsos Public Affairs** have formed a partnership for public opinion polling. They will collaborate on development and distribution of twice-a-month national polls, occasional state polls and quarterly international polls.

Association/organization news

Britain's **Market Research Society** (MRS) has appointed Jeremy Bullmore, former chairman of London-based J. Walter Thompson, as its next president. He will assume the role this spring. Following his 33-year career at J. Walter Thompson, Bullmore was appointed a non-executive director of WPP in 1988, a position he still holds. He was a non-executive director of the Guardian Media Group for 10 years and from 1981-1987 served as chairman of the Advertising Association.

Awards/rankings

Inc. magazine has ranked **The Myers Group**, a Snellville, Ga., health care survey research company, number 124 on its Inc. 500 list of the fastest-growing private companies in the country. The firm had a five-year sales growth of 1,266 percent.

New accounts/projects

Herndon, Va.-based **WebSurveyor Corporation** announced that NASDAQ has selected WebSurveyor's online survey solutions for its employee and customer feedback regarding training programs and other corporate initiatives.

Anheuser-Busch Inc. has selected the InfoScan Convenience Store National Service of **Information Resources Inc.**, Chicago, to help it develop, implement and evaluate sales and marketing programs.

New companies/new divisions/relocations/expansions

Milwaukee-based research firm **Market Probe** has opened a new branch office in Sydney, Australia. In conjunction, Peter Mills has been named Australian country manager.

Perseus Development Corporation, Braintree, Mass. has opened a new office in St. Joseph, Mich. The office is opening to support Perseus' business within the automotive industry. Barry Eaton, the

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By Cary Funk

There's just **one rule** in designing questionnaires

Questionnaires and surveys are an important tool in customer satisfaction research. There's no better way to know what customers are thinking than to ask. The survey (whether conducted in person, on the phone, in writing, or over the Internet) allows market researchers to gather feedback from large numbers of customers and rapidly analyze their responses. There's one important hitch to the process, though. The feedback you receive on surveys will only be as good or as useful as the questions you have asked.

There are several things you can do to design useful questionnaires, such as being clear about your information goals and making sure your questions match up with those goals. In this article I'll focus on the more mundane business of exactly how to go about wording the questions.

Regardless of your information goals, producing a well-designed questionnaire requires a clear focus on the customer. As a teacher of survey design to beginning researchers, I can attest that most first attempts at designing questionnaires lose that focus. Even more-experienced survey researchers find it hard to keep the customer front-and-center during the design process.

Every textbook on survey research has a list of dos and don'ts for writing good survey questions. Herb Weisberg and his co-authors Jon Krosnick and Bruce Bowen advise question designers to use clear, unambiguous wording, avoid writing biased questions, avoid double-barreled questions, and avoid using double negatives. Earl Babbie's textbook on survey research methods recommends the following laundry list for question construction: make items clear; avoid double-barreled questions; ensure the respondent's competency to answer; ask relevant questions; use short items; avoid negative items; avoid biased items and terms. Floyd Fowler has written a whole book on the topic of designing survey questions.

All this advice really boils down to just one thing: Thou Shalt NOT Offend Thy Respondents.

The many textbook rules converge into this one simple principle. The problem is that following even this single rule is a lot harder than it looks. When designing a survey questionnaire, there are countless opportunities to violate this simple-looking rule. Let's review the options.

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1. *Show them you don't care.*

Each question is an opportunity to demonstrate to respondents how little you've thought about or care about their answers. For example, consider asking two or three questions at the same time. That way respondents won't actually be able to answer the question with the categories provided. Or, make it impossible for them to answer your questions in the categories provided because the categories aren't mutually exclusive or don't map onto their experience. Extra options are available in self-administered surveys where only the


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smallest spaces can be provided for open-ended responses. This way, respondents understand that open-ended responses are not actually wanted. If possible, the whole survey can also be in a small font with limited white space so that respondents feel like they have to work hard in order to complete the survey. Speaking of hard work, make the questionnaire as long as possible so respondents are fully aware that their time is freely available to meet your needs.

If you've failed at all the other options, you can always make respondents play the guessing game in order to complete your questionnaire.

2. *Insult them with words.*

The quickest way to offend respondents is to insult them through the language chosen for the questionnaire. Pejorative and emotionally-charged labels are a sure way to turn respondents off. This is why researchers typically use the most widely accepted terms for racial or ethnic groups. Similarly, questions about events or people involved in activities thought to be undesirable make especially easy options for insult; use a pejorative label for an undesirable activity or physical condition and you'll be sure to insult.

3. *Insult their intelligence.*

There are a number of ways to make respondents feel stupid. One of the easiest options for self-administered questionnaires is to hide the skip pattern so respondents can't tell if you realize that the questions being asked don't apply to them or if you want them to contort their lives to fit into your neat categories. The added benefit here, especially for Internet surveys, is that you may be able to come back to the respondent and ask them to "correct" their work when they don't answer all the questions. That way you get two chances to make them feel stupid. Another variant is to use vocabulary they don't know. This makes it clear that more educated respondents are the ones being sought and those who don't make the grade should go elsewhere. And, just in case you have a respondent bold enough to ask about a term used in a telephone or face-to-face interview, have interviewers reply with "whatever it means to you." Another way to make respondents feel stupid is to quiz them repeatedly on an obscure topic. By the end of the series, respondents will get the message loud and clear. If you're not planning to use this as a sugging opportunity (selling under the guise of polling) to push your tutorials on the topic, you might want to balance a research interest in assessing awareness on your obscure topic with the respondents' need to be reminded how little they know.

4. *Make them play the guessing game.* If you've failed at all the other options, you can always make respondents play the guessing game in order to complete your questionnaire. The guessing game allows you to frustrate respondents by asking questions they can't answer. Use vague qualifiers and abstract language as much as possible so that respondents will never really know what you're after. Use double negatives so that it's anyone's guess whether they actually agree or disagree whether smoking should be forbidden in restaurants. Try to ask for specific factual data so obscure that no respondent will be able to recall the information. For example, how many times have you been to see a dentist in your lifetime or, how often have you watched television network news in the last 10 years? The easiest way to make respondents play the guessing game is to ask them about hypothetical situations where no one really knows how they would feel or what they would do in that situation. If a loved one in your family had leukemia, would you want them to use drugs not approved by the Federal Drug Administration in their treatment plan?

All about them

The objective behind all of the dos and don'ts on questionnaire design is to produce a survey that 1) functions so that people can do what you ask them to do and 2) communicates your focus on the customer. It really is "all about them." The questionnaire needs to demonstrate that focus and an understanding of the customer's perspective in order to communicate that you care about their experiences and perspectives.

In this age of declining survey cooperation rates, a well-designed questionnaire is more important than ever. The survey design is one of the key ways that market researchers can influence respondent cooperation and foster goodwill for future survey requests. IQ

By Nick Andrus

Laugh out loud

You know what really makes me mad? Marketers who laugh at their customers while attending focus groups.

LOL. No, it's not just an instant messaging term or something that occurs at open-mike night at the local comedy club. It's also what often happens when clients and their agency account teams attend focus groups together. After settling into the viewing room and sorting the red peanut M&Ms from the green and yellow ones the team is ready for an evening of qualitative research. There's a refrigerator nearby filled with beer, soft drinks, water and wine and a stack of menus to peruse and order dinner from. And, with any luck, they've picked some fun, exciting cities to conduct the groups and the night is young. All's right with the world.

Enter the customers

And what's the very first comment that you hear? "Take a look at the gut on that guy. Betcha he's the first one to reach for a cookie." (LOL) "Is that a bowling shirt that guy is wearing or does he just shop at a bowling alley for his clothes." (LOL)

Am I wrong or are these not the people that you left the office, traveled to some distant city and paid to listen to? Aren't these the very same people that we as marketers are supposed to covet and cherish? So what's going on here, some client agency bonding or a serious attempt to gain insight into why customers buy or don't buy your products? What started out as legitimate effort to search for answers has quickly deteriorated into a joke fest.

The group begins

After some brief preliminaries the session begins in earnest with the moderator attempting to do the very best job possible. She tracks through the session vigilantly, following the pre-approved moderator's guide and diverting from it when something interesting is raised by a group member. But even she is not immune to the barbs of the group behind the mirror.

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Between conversations and the occasional joke some listening actually begins to take place. "What did that guy say about our product? It wasn't meant to be used that way. Is he nuts or what?" "We don't have distribution at Wal-Mart; he couldn't have bought it there." "Our product doesn't have that feature. What product is she talking about?" As the participants' responses are derided and discarded real listening wanes and it's back to the Beer Nuts and jokes.

Having spent 90 minutes moderating the group the moderator takes a break, enters the viewing room and asks the team if they have any additional questions or areas they would like explored. "No. Let them go," is too often the response.

Wasted opportunities

Thinking back to the group there

were undoubtedly many wasted opportunities to gain additional insight from the respondents instead of deriding their responses. For example, why was that one group member using the product in a way it was never intended to be used? What need was he trying to fulfill? Could a new product be developed to better fill that need? Why did the one respondent think that they bought the product at Wal-Mart? Is Wal-Mart a natural or expected distribution channel for this type of product? Would they like to see the product carried at Wal-Mart? Why or why not? Or how about that feature that the one customer thought your product had...is this another opportunity to explore for a new product idea or a significant line extension?

Laugh out loud

So, who has the last laugh in the above scenario? Unfortunately, nobody does. The well-intended moderator has done her best to deliver a quality product and will put hours of work into a final report that may not be seen as valuable to the client. The client and the agency have missed numerous opportunities to gain important insights into their customers' behavior. And the customer may not see that new product that would better fulfill their needs for many years to come.

Next time, try this alternative approach:

• View each opportunity you get to talk to and listen to you customers as gold.

• Listen to them with an open mind.

• Leave your personal theories and opinions in the parking lot. When you hear something that doesn't fit them, make sure that it's probed extensively by the moderator. You just may be wrong, you know.

• Thoroughly debrief after each and every group. Modify the guide to incorporate new learning or to determine just how pervasive an opinion might be.

The customer is gold. Don't forget it. Treat them with respect and covet their loyalty and you'll have the last laugh for sure. | Q

> **Leave your personal theories and opinions in the parking lot. When you hear something that doesn't fit them, make sure that it's probed extensively by the moderator. You just may be wrong, you know.**

 By Sally Schmidt

Character development

KidsCom enlists its audience's help in shaping site avatars

To market successfully to youth, it is important to listen to them and not allow our adult biases to influence marketing message development. Internet research methodologies provide an opportunity to communicate with this hard-to-reach market segment and provide timely insight to guide creative, character, and message development.

The KidsCom.com site, an edutainment Web site for children 8 to 15 years old, has been continually changed and updated since Circle 1 Network established it in 1994. Some of the most important changes have involved the development of a set of characters that represent the site. Circle 1 Network has worked with our firm to use research with youth to define and develop these characters to ensure the site visitors could identify with them. Circle 1 Network did not want to develop characters that their staff (of adults) thought children would connect with - they wanted to develop characters that they knew the children connected with. At least four surveys have been conducted over the past eight years specifically about the characters. These surveys have been done with children around the world, with some questionnaires appearing in the children's native language. Being a global site, it was important to find character designs that appealed to a broad audience and would not have negative cultural connotations.

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Sharing opinions

We have found that online surveys are an effective way of gathering input from kids who are old enough to have typing skills. They enjoy sharing their opinion and a survey allows them the opportunity to state their opinion without being challenged by another peer. The online surveys for the KidsCom character research were all conducted with the KidsCom Club Youth Panel, which consists of children whose parents have agreed to allow them to participate in research. Registered KidsCom Club members can participate in surveys and receive KidsKash points as an incentive. These points earned by taking surveys can be redeemed for merchandise on the site.

When conducting online research with children, researchers need to be aware of the Children's Online Privacy Protection Act (COPPA), which requires parental consent before collecting any personally identifiable information from a child under 13 years old. Although research results are reported anonymously, this rule still has impact on researchers. Often researchers use personally identifiable information (such as an e-mail address) to ensure that each person only participates in a survey once or to provide an incentive and it is essential that COPPA guidelines be followed in any contact using personally identifiable information. The KidsCom Club Youth Panel is fully COPPA-compliant.

Through many online surveys with children we developed some guidelines that are helpful when developing surveys for children. Creating online surveys for kids requires special attention to word choice and survey length to ensure usable results. Survey directions, questions and answer options should be worded so that they are age-appropriate, allowing the children to understand them. Children and teens are very literal in their interpretation of copy; so specific, accurate wording is needed. It is especially important to pre-test youth surveys to ensure that they are comprehended correctly. The length of a survey should be monitored to be age-appropriate since younger children are still developing their reading skills. They will quickly become fatigued by a survey if it is long or contains many open-ended questions. We have found that surveys with a maximum of 15 closed-ended and two open-ended questions work best. Interesting topics, graphics to illustrate questions and interactive question choices help keep children and teens involved in a longer survey if necessary.

Initial character development

From its inception in 1994, the KidsCom.com site has included characters. The first characters were very basic, one-color figures. As the site content grew and the audience target geographically expanded, new characters were added and existing characters were enhanced to represent different areas and activities on the site. Input from kids was used at various stages in the characters' development to name, enhance their

personalities and evaluate them with different audience targets.

In 1996, the site was redesigned and 11 characters were featured more prominently. A survey was conducted with members of the KidsCom Club Youth Panel to determine which characters were their favorites. The characters chosen as favorites by the children had their identities further developed on the site and were used to promote different content areas and educational messages than the less popular characters. The less popular characters were removed from the site over time.

Can characters deliver a message?
In 1997 two surveys were used to test a new character for the site in response to the need for children to provide information responsibly on the Internet. To promote understanding of safety and privacy issues online, a character was developed that would appear next to any area where it was appropriate for them to provide personally identifiable information. This character was designed to let site visitors know that an area was safe to provide information because the site was following safe data collection practices. The goal was to help guide children to understand where on a site it was safe to provide information because it was going to be used responsibly versus when it was unsafe (e.g., to provide information to another site visitor in the chat area). Note: This was prior to the enactment of COPPA.

The first survey was used to design the character to make sure that its association with privacy and safety was easily understood. In the online survey, KidsCom Club Youth Panel members were asked to evaluate two characters - one based on a lock and one based on another design concept - and then identify if the character reminded them of being safe or being private. The lock character (Figure 1) was preferred and reminded them more of being safe than the other design approach. The character (Kidbe Safe) was trademarked and was used on the site anywhere it was safe for visitors to give out their information.

A few months later, a follow-up survey was conducted to see if visitors could learn to identify the character with an associated action or behavior.

Figure 1: The Kidbe Safe character lets kids know when it's safe for them to give out personally identifiable information on the site.

The Kidbe Safe character was again tested in an online survey, along with three other characters. Over two-thirds of the panel members correctly identified the character and knew that Kidbe Safe meant it was safe to give out information, proving that children could learn to associate a character as a guide to modify their actions on the site.

Developing personalities

In 1998 a review of all 18 characters available on the site was conducted through an online survey with the KidsCom Club Youth Panel. Participants were asked to rate each character and then choose the one they liked best. For the character they liked best, they were asked to suggest a name and to choose from a list of adjectives to describe their favorite character. The names and adjectives suggested by the panel members were used to further enhance the character identities and to build new content areas based on these identities.

Of the 18 characters, six of the characters with the highest ratings were chosen for further design development and to become active participants in content on the site (see Figure 2). Games and activities and story lines were then developed using these characters to further enhance message delivery. For example, the dog character, named Riley, was seen as funny by over half of the children in the 1998 survey. He then became the featured character in the "Just Joking Around" area of the site where visitors can read a daily joke and submit their own jokes. He also became the basis of content that taught children that it is important to do the right kind of jokes and to be careful of hurting other children's feelings. The

Figure 2: Kids gave the highest ratings to these six characters, leading KidsCom to increase their presence on the site.

Figure 3: Feedback from a second test helped KidsCom enhance the characters to make them more engaging.

nerdy character, named Dumonde, was rated smart by three-quarters of the children and teens. He was redesigned to be a cool science-and-gadget-geek type of kid and is featured in content areas that involve doing science discovery or creating things.

Refining the characters

In 2001, the characters were tested again. This survey covered the six characters featured on the site. KidsCom Club Youth Panel members were again asked to rate each character and then choose their favorite and least favorite character and explain why. From some of the feedback received about the characters, they were redesigned to make them more engaging so visitors could build stronger identification with the characters (see Figure 3). The characters have grown to have unique personalities and relationships that are used to provide a variety of personality types for children to identify with and to help them learn about themselves and positive social interaction.

Important to listen

Kids play an active role and are a growing influence over their own and their families' online and offline purchases. The Internet is an effective tool to reach kids. Online research with kids can be used to design and develop effective marketing tactics and is not limited to Web site development. Input from kids can be used to guide the development of new products and online and offline advertising or promotions. To market successfully to kids, it is important to listen to them and not allow adult biases to influence marketing message development. Research methodologies based on new technologies can provide an opportunity to communicate with this hard-to-reach market segment and provide timely insight to guide creative development. | Q

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Clarifying the numbers

By Bob Witeck
and Wes Combs

Aiming a spotlight on the lives, relationships and household structures of gays and lesbians represents a significant challenge for all researchers, from social scientists and demographers to market researchers and political pollsters.

This reality begs the basic question: How do you identify, enumerate and query individuals who often choose not to be recognized, let alone counted and observed?

Starting in the late 1940s with the Kinsey Report's 10 percent estimate serving as a controversial benchmark, many researchers have attempted to perform their own counts using a wide range of useful, albeit imperfect, tools - from the General Social Survey (GSS), intercepts at community events like gay pride festivals, gay magazine readership analysis, postcard surveys, the U.S. Census measure of same-sex households, as well as conventional telephone and online surveys.

As communications strategists, we began our work over a decade ago to help corporations, foundations, public policy leaders and health care providers identify the myriad characteristics, needs and aspirations of the lesbian, gay, bisexual and transgender (LGBT) community in America. Like many others, however, we were frustrated by the dearth of credible, projectable data to accurately characterize this hard-to-reach population.

In our judgment, early market researchers too often distorted or mythologized the LGBT population by over-emphasizing the highly visible gay white urban male. This segment of the community was the most "out" and therefore comprised a larger portion of the magazine subscription lists as well as the attendees at gay events. This skewed research using samples primarily from gay magazine readership surveys. It is not surprising that some investigators ballyhooed the affluence and mystique of the gay consumer. To be fair, they were on target after all, but only provided data about a slice of a segment within the LGBT population - and one that was more readily detectable and open in market behaviors.

Do gays count? Can they be counted?

Regrettably, these distortions resulted in public policy side effects by exaggerating wealth and privilege among gays, and suggested that economic and political discrimination towards gays and lesbian are nonexistent at worst, or are overstated at best. Poor data of course influences poor analysis and policy decision-making.

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Fortunately, through advanced survey techniques and through the examination by social scientists such as Dr. Edward O. Laumann at the University of Chicago, Dr. Lee Badgett at the Institute of Gay and Lesbian Strategic Studies, Dr. Gary Gates at the Urban Institute, Dr. Katherine Sender at the University of Pennsylvania, Dr. Marc Rogers at Hunter College and others, we are achieving a richer, more complex and more accurate picture of gays, lesbians and bisexuals through reexamined and newly emerging data.

As marketers, too, we benefit from this scientific perspective and foster our own investigations about gay and lesbian households by tracking attitudes in the workplace and in commerce to understand the similarities and contrasts with the non-gay population.

For the past four years, we have worked in partnership with Harris Interactive, Rochester, N.Y. Our experience has been transformative, and helped us pave the way to better understand not simply the lives of gays and lesbians, bisexuals and transgender people but also about the essential role of advanced research. The lessons learned and obstacles overcome may be valuable to any investigator wishing to understand more about this emerging population.

We share a few of these lessons and insights here.

• Sexual orientation has many dimensions

Fifty years after Kinsey questioned college students and convicts, we now may credit Dr. Edward Laumann and his colleagues for their important work, *The Social Organization of Sexuality* (University of Chicago, 1994), which establishes the case for defining homosexuality along three distinct dimensions: identity (how individuals self-label their sexual orientation), as well as the expression of same-sex desire and same-sex behavior.

In a national sample, this research posed essential questions about same-sex behaviors, partners, appeal and attraction. The survey subjects were given face-to-face interviews conducted privately and in confidence - however, the questions about sexual behavior, desire and identity were submitted in writing and asked in a self-administered questionnaire only at the very end of the interview. The interviewer never saw the answers because the private questionnaire was placed in an envelope and sealed by the respondent before being handed back.

On same-sex behaviors, this study determined that slightly more than 4 percent of women sampled, and nearly 9 percent of men sampled, reported that since puberty, they had had sexual activity of some kind with same-gender partners.

• The fluidity of sexual orientation

Another important dimension of sexual orientation is the fact that, unlike most racial characteristics or ethnic traits, of course, sexual orientation is not an attribute that can be tracked nor detected at birth. And for some, sexual orientation clearly is not fixed but is instead a mutable characteristic. Sexual maturity and awareness awakens at different times for different individuals.

Another challenge with tracking individuals based on their sexual orientation has to do with the fluidity of sexuality itself. Is being gay or lesbian being attracted to a member of the same sex? Or is it only people who actually have sex with members of their own sex? Does it include people who only sometimes have sex with members of their own sex?

Laumann's research underscores that the proportion of individuals who express same-sex attraction or participate in same-sex behaviors - whether male or female - are in greater number than those willing to self-identify as gay, lesbian or bisexual.

Our online investigations, as well as the work of others, also show that self-description - i.e., identifying openly as gay, lesbian or bisexual -

remains a very complex process influenced by innate and environmental aspects. For some, particularly males, the process of identifying as gay or "coming out" appears to occur at more youthful ages, while for others, the process may not unfold until mid-life, if at all.

These observations ought to be qualified to understand that our culture is shifting in a number of seismic ways. In the future, with increased visibility of LGBT individuals and characteristics, the perception of children and adults will change with time. There is some anecdotal evidence of this shift underway - with adolescent girls attending high school proms together, and identifying as bisexual or lesbian.

Socialization, family expectations and cultural norms, of course, play key roles in the comfort and acceptance that any person feels about their sexual orientation. Most recent sampling of gays and lesbians, therefore, tends to be skewed towards younger, emboldened individuals (for example, between the ages of 18 and 35, contrasted with fewer proportionately who are 50 years of age and older). Our samples also suggest a wide range of self-knowledge about bisexuality - with a broad range of behaviors and attractions among men and women who embrace this label.

• Gender identity vis-à-vis sexual orientation

Arguably the least understood and hardest to find population within the so-called LGBT community is that of transgender individuals. Unlike sexual orientation, gender identity does not specifically focus on same or opposite sex attraction or behavior. This is very new territory for social and biological research, of course.

Instead, a transgender individual is one whose assigned gender at birth may differ from their own perception as a man, woman or intersexed person (someone with characteristics of both sexes). For good reasons, researchers must take caution in not confusing gender identity with sexual orientation.

• How many? The Census helps show the way

Census 2000 may be best recalled by the national media as the gay census for its far-reaching effort to enumerate same-sex households. Although single gays and lesbians were left out of the count, demographers say the tally of 1.2 million same-sex "unmarried partners" is the result of the most extensive polling ever conducted of gays and lesbians in America.

Remarkably, more than 99 percent of all counties had at least one household headed by unmarried partners of the same sex, including places in the rural Midwest and Deep South. Gay or lesbian couple-led homes totaled close to 600,000 nationwide, and moreover roughly one in three lesbian couples and one in five gay male couples were raising children in 2000, the Census report found - contrasted with 39 percent of opposite-sex unmarried partners who have children. The comprehensive analysis of this demographic data by Urban Institute researcher Dr. Gary Gates (*The Gay and Lesbian Atlas*, Urban Institute 2004), promises to provide us with the deepest and most valuable portrait yet of same-sex households.

• The myth of affluence

Stereotypes about gay affluence are hard to dispel, yet economist Dr. Lee Badgett has dedicated the past few years to a closer examination of existing income and population data on gays and lesbians. In her recent book, *Money, Myths and Change* (University of Chicago, 2001), she explores the true diversity of economic life within this population and the reality that lesbians and gay men earn no more than their heterosexual counterparts. Moreover, it appears in some cases that gay men earn less than comparable heterosexual men.

Badgett's findings rebut poorly-conceived marketing studies conducted in the early 1990s that claimed gay people's incomes exceed the national average - studies she and many of us find are tilted toward the well-educated and affluent.

• The anonymity of the Net

Finding hard-to-reach populations has always strained researchers and posed costly obstacles to yielding meaningful, authentic samples. Given overriding issues of privacy and stigma, gays and lesbians have traditionally been among the most difficult if not most costly to track.

While some researchers have resorted to polling at gay pride events or by relying on other venues such as gay bars and publications, these samples are predictably flawed since they include only the most open and fearless members of the population. Conducting conventional random methods such as telephone surveys likewise have produced very small incidence of self-identified lesbians and gays - usually no more than 1-2 percent of any population. Written surveys may yield as many as 3 percent gays and lesbians in any random sample.

In the past several years, however, online techniques have emerged as a favored solution because of their convenience, cost-efficiency and privacy safeguards. Online surveys allow respondents to maintain complete anonymity so that many more gays and lesbians are comfortable in being asked to share their experiences, concerns and specific details of their lives, partners and households. Consistently, the incidence of LGBT people among online survey samples has ranged from 6 to 7 percent.

While there are inherent biases in all forms of research, the key is reducing online sample bias by:

— recruiting respondents from a very broad pool of offline and online sources, backgrounds and geography;

— safeguarding against individuals attempting multiple responses;

— achieving generous sample sizes sufficient to draw conclusions;

— conducting parallel testing online and offline to scientifically establish weighting techniques for all sampling; and

— disclosing survey methodologies and margins of error to conform to industry polling standards.

In our experience over the past few years, we have consistently found lesbians, gays and bisexuals have a strong affinity for the Internet and its anonymity - and make far greater use of the Internet as their primary way to connect with one another with discretion, purpose and safety.

Attitudes evolving

Times are changing very quickly, and America's attitudes towards gays and lesbians are evolving with the times. From powerful trends in popular culture and television, to political reforms and historic judicial decisions curbing anti-gay discrimination, it is increasingly clear that gays and lesbians will play far more visible roles in day-to-day life.

Whether on the outside looking in or the inside looking out of the gay community, the explosion in new, better and smarter research will pay untold benefits in the years to come. | Q

special markets: GLBT

Starting the dialogue

By Deborah Gonderil

Statistics on the size and demographics of the GLBT (gay/lesbian/bisexual/transgender) population are sketchy and often developed by inference from data collected in traditional ways (e.g., a percentage of households of non-married adults of the same sex may be inferred to be homosexual). For many years, the estimate of 10 percent of the adult population was accepted as the incidence of the GLBT population, based on Alfred Kinsey's research in the '40s and '50s. At this time, the more acceptable level is 5 percent to 7 percent, from a variety of studies conducted. This would represent 11 to 15 million people, a not inconsiderable market.

We have had an increasing number of requests for information on interviewing the GLBT population. Clients are considering the efficacy of targeting this niche market. Market research is being asked to develop answers to the following questions:

• Can mainstream advertising include messages and graphics which will appeal to both mainstream consumers and this niche?

• Can the market be motivated with advertising in gay-targeted media?

• What media and what messages are most effective in communicating product/service benefits to this market?

• Is it necessary to make any changes in media, marketing or advertising messages to this market?

Certainly, the answers will be different for each client.

Interviewing the gay/lesbian/bisexual/ transgender market

These are the guidelines we give our internal and external clients for developing research programs.

1. Qualitative research is recommended as a starting point for hearing what this market has to say and to determine the extent to which information about the market should be quantified for your client. Qualitative facilities in major markets have experience in recruiting the market, we have found.

• We strongly do not recommend using as a moderator a person who is a member of the niche market, unless that person is also a highly qualified moderator.

• Qualified moderators are accustomed to conducting research on subjects with which they are not necessarily personally familiar.

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• We recognize the special nature of this niche market – it not a question of the moderator simply not being a user of a product – but we take the position that a sensitive, aware moderator will be competent to conduct the GLBT groups/one-on-ones.

2. Quantitative research possibilities are limited to certain techniques.

• Mailing lists of GLBT populations are available to use as bases from which to draw sample.

• There are several GLBT Web sites that offer research services.

• If sample sizes are not too large, the focus research facilities' databases can be used.

• Interviewing can be conducted in person – with permission – at venues frequented by GLBT populations. This could include clubs, restaurants, bars, beaches.

• Once identified, GLBT respondents may be interviewed in person or by telephone. If privacy or presentation of test materials is needed, a pre-recruit to a central location or a Winnebago may be used as the test venue.

• Random dialing is not to be considered, if the respondent must be qualified as GLBT in the phone call. The efficiency would be low and the reliability of getting a random sample of the GLBT population would be suspect.

• If the client wishes to identify GLBT participants in a mail survey (either panel or client sample), in which both GLBT and non-GLBT respondents will be included, a test/control audit should be made of the response rates that would be developed from the non-GLBT sample. There may be a serious depression of the response level with the categorizing question in the survey.

• With the increasing acceptance of the gay lifestyle and legislation protecting it, potential respondents may be more forthcoming in self-identifying. It may then become increasingly easier to conduct reliable quantitative research.

3. Guidelines to conducting groups

• In addition to standard demographic (age, income, education) and product usage considerations when developing recruiting criteria, there should be a consideration of whether the potential respondent has a life partner. We have found that presence of a partner (or not) drives decisions in such categories as travel and alcoholic beverage consumption.

• It is not recommended that gay and lesbian respondents be put in the same group. If you do so, you may get a more negative response from the lesbians, who often feel that their opinions and attitudes are less well-served than are those of the gay community.

• It is not necessary for the moderator to identify his/her sexual preference. But we would recommend that, if asked in a group, the moderator does identify as he/she wishes and then gets on with the discussion.

• It will be apparent to the focus group members that all members of the group are gay or lesbian. It is recommended that the moderator address that. Explain that the client wishes to know the responses and attitudes of people in the GLBT population. But stress that each person in the group is to speak for himself/herself and not for the entire GLBT population. There seems to be a tendency for this population, more than for others, to express their responses and attitudes in the context of representing the entire population.

4. Findings we can share

• In many ways, GLBT consumers respond to products and services no differently from others populations. They look for quality, value, convenience and service.

• They do respond positively to products/services that cater to their special interest, when appropriate. For example, they are very aware of travel destinations that are gay/lesbian-friendly. In that industry, the network of information, both online and word-of-mouth, is powerful.

• They will respond negatively to product/services offered by companies who are perceived as being anti-gay/lesbian. This information may be communicated through the networks mentioned above or in the general media (e.g., a newspaper/TV quote, a public stand on legislation or legislators negative to gay/lesbian interests).

• The gay (male) population is aware of the fact that they index high on disposable income. They think it reasonable that purveyors of high-end products/services target them in marketing and promotion.

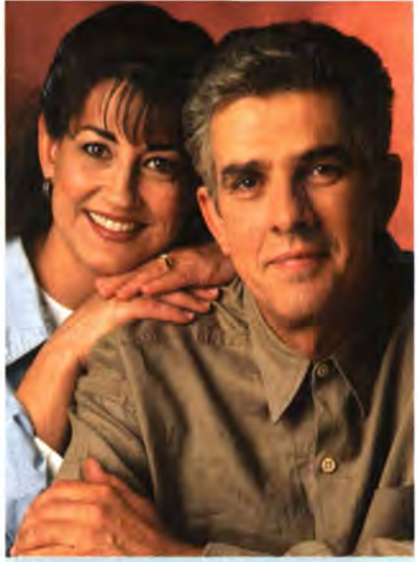
Gays and lesbians want general market advertising to be more inclusive of what they feel is the true face of America. To the gay/lesbian communities, most general market advertising is non-representative of the American scene, because it traditionally excludes them. They are well-aware of the recent inclusion of racially diverse populations in general market advertising and feel the advertisers are losing potential sales by not including representative of their communities.

• Gays and lesbians want the visual content of advertising and other marketing efforts in general market advertising to include gays and lesbians as well as "straights" in natural settings. They don't want blatant approaches, but rather two men/two women in the same kinds of representations (touching, looking "connected") as the non-gay/lesbian characters in the advertising. With the proliferation of gay/lesbian parenting, they also want same sex parents shown with their children.

• Even if gays/lesbians use media directed at them, they are also, obviously, users of general market media. While the advertising in general market broadcast has not included them, the program content is increasingly including gay characters. They voice an appreciation of this trend and would reflect this appreciation by purchasing products/services of advertisers who sponsor programming that does include gays/lesbians.

• More research needs to be conducted among the general population to evaluate the effect of including the visuals mentioned above on their reactions to the advertising, the image of its purveyors and their intention to buy. The gay/lesbian population is a minority, of course, but its high-end demographics should lead general market advertisers of appropriate products to consider evaluating the content of their marketing. | Q special markets: Boomers

Missing out on the boom



By Howard Willens and Leslie Harris

Recent articles in the trade press have pointed to efforts by marketers and advertisers to reach and attract Boomers. However, our research findings show that these efforts are falling short.

The data indicates that Boomers continue to await evidence that marketers take Boomer needs into consideration when they develop new products and services - as well as evidence that their advertising understands and addresses the issues that motivate Boomers.

Our most recent study confirmed that Boomers are savvy, up-to-date consumers. It told us that Boomers carefully plan their purchases of key items, adapt to changing conditions and attitudes, are open to new developments, seem to be among the leading users in a surprising category, and desire to stay healthy and continue in the mainstream.

Let's examine these findings with regard to Boomer attitudes towards several important product and service areas - specifically in terms of what they imply for marketers and advertisers.

New product acceptance

Many marketers believe that Boomers are set in their ways and are therefore less likely than younger segments to try new products, especially packaged goods.

In our investigation of four product categories, nine out of 10 Boomers told us they would be very or somewhat likely to try new products in these categories: packaged foods, household cleaning products, personal care products, over-the-counter drugs.

Additionally, seven in 10 Boomers told us they are very or somewhat likely to try new brands in existing product categories.

Study shows Boomers still feel ignored by marketers

The implications here for marketers are clear: To attract and satisfy Boomers, they must focus aspects of their product development and communications programs on Boomer needs and motivations.

Purchase planning

Our study investigated purchase planning for a limited number of what are, for the most part low-impulse-purchase products - each in a different price and utility category. The purpose of this line of questioning was to determine the extent of pre-planning for each, assess observed differences among the different price levels/utility levels, and draw inferences based on the findings.

We learned that Boomer planning for the purchase of household appliances and small/new technology electronics is apparently on an

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as-needed or as-persuaded basis, rather than being part of a long-range plan.

One in three Boomers plan to purchase a narrower utility product in the next three to six months. Of greatest interest/need are: household appliance (washing machine/dryer, refrigerator), digital cameras, and laptop computers. Only one in 10 have similar plans six to 12 months out.

Utility in these particular categories is determined by use, need, importance and interest - and is balanced by price.

On the other hand, Boomer planning for a new vehicle purchase or lease - a more expensive/broader utility item - is a longer-term process (and is identical for domestic and import nameplates). One in 10 are planning to purchase or lease a new vehicle in the next three months. Three in 10 are planning to purchase or lease in the next 12 months.

The higher the price, and broader the product utility, the more likely a product is to have a relatively long purchase planning cycle. And, conversely, products that are relatively lower priced, narrower utility items seem to generate need or interest more quickly (as with new technology items) and thus, have a shorter purchase planning cycle. (This example also tends to illustrate the interest that Boomers have in new technology items, as will be illustrated further in a later section.)

Marketers of lower-impulse items of varying utility who desire to attract Boomer money would do well to consider these timing implications in their communication and promotion planning.

<u>Significant product categories</u>

No study of ideas and attitudes in the Boomer marketplace would be complete without an assessment of their attitudes and behavior towards two product categories that are important aspects of American culture.

• *Motor vehicles*

One of the major problems the domestic automotive industry had to overcome has been a public belief that imports are better vehicles overall - specifically in terms of quality, dependability, reliability and gas mileage.

Our research indicates this attitude seems to be abating significantly among Boomers. Two out of five strongly disagree that domestic manufactured cars are less reliable than imports (male Boomers to a still greater extent). An additional one in five disagree somewhat.

In other words, 60 percent of Boomers are now strong targets for domestic vehicle nameplates.

The opportunities this attitude opens to domestic manufacturers are obvious. They must continue to create reliable products that have appeal for Boomer men and women. But more importantly, their advertising and public relations agencies must create communication programs that focus on reliability as a key issue - and convincingly demonstrate a high level of reliability to all prospects, particularly this newly interested group of Boomers.

• *Fast-food restaurants*

Half of Boomers surveyed patronize fast-food restaurants on occasions other than for lunch during the workweek. This sub-segment of apparent heavy and loyal fast-food fans apparently view these establishments as "filling stations." That is, they utilize fast-food restaurants as places where the can inexpensively satisfy their hunger with a food they like, and then move on. They also like the atmosphere of their favorite fast-food restaurants and are comfortable with other patrons in these establishments.

Fast-food chains in general will continue to attract the Boomer "filling station" market, as they satisfy a basic, utilitarian need. However, a product-oriented differentiation - and a feeling of continued comfort and welcomeness - is the order of the day for fast-food marketers wishing to attract and/or retain these Boomers.

<u>Technology, including computers and the Internet</u>

Boomer embracing of technology is - to some observers - a phenomenon. Their ownership of computers and cell phones is at least on a pace with the rest of the U.S. population and in some instances outstrips other segments. Boomer affinity to technology likely stems from convenience, especially the Internet and the handiness of cell phones.

Our research indicates that Boomers are highly receptive to - and are a good market for - today's new technology products. For example, as our latest study found:

• Nine in 10 Boomers own a computer; almost all of these people also subscribe to an Internet service.

• Boomers are participating to a significant extent in other electronic technology as well. Four in five own a cell phone (as compared with a

U.S. population average of 70 percent). Two out of five own a digital camera - and their interest is growing (driven by taking vacation pictures and grandchild pictures, and not having to bother with the inconvenience and the expense of film and film processing).

Boomer ownership and use of these products is one more piece of evidence disproving marketer attitudes about older people being slow to accept new products and brands.

Housing

Boomers are unwilling to spend their retirement years in a place for "old people." Rather, when they retire, they wish their life to continue as it is - in a "normal" environment, with different kinds of people.

Only one third of Boomers are planning to move to a new residence in the next 10 years. Half will stay in their current state; the other half is planning to move to another state.

Half are planning on a more expensive home, half on a move to a less expensive home.

The vast majority prefer their main residence - should they move at all - to be in a traditional subdivision that encompasses a full range of ages, as opposed to a planned community of seniors.

The implications of this attitude are enormous for real estate companies, developers and operators of so-called retirement communities.

Personal health

Personal health is a major Boomer concern and activity. Most Boomers now pay more attention to and participate in a wide variety of health-care related activities as a way of preserving their health. The consequences of these Boomer activities have wide-ranging implications and potential for appropriate marketers.

For example, we learned that:

• Three out of four Boomers are on some form of diet, either self-regulated or with a commercial diet center. Considering the size of the Boomer segment, marketers of supplements and diet plans should take notice.

• Two out of three Boomers are taking vitamins and/or mineral/herbal supplements as a way of addressing their health needs and concerns. Marketers of these products should pay attention to Boomer motivations, and how they focus their communications and promotional programs.

• Two out of three Boomers walk for exercise at least three times per week. Consider the potential for such products and services as walking shoes, warm-up suits, shorts and t-shirts, athletic socks, water bottles, energy bars and supplements, pedometers, hats and caps, small radios and CD players, etc.

• Half of all Boomers have purchased and use exercise equipment at home. Attention manufacturers of relevant equipment: All of your potential is not to be found among the young and muscular body-builders!

• Fifteen percent of Boomers belong to a health club. Again, considering the size of the Boomer segment, this is no small number. Sports and health clubs be aware that all of your potential is not Generation X! There is a group of people out there who exercise to maintain their health and vitality - but with a different set of motivations.

Half of all Boomers surveyed told us that advertising convinced them to investigate a particular drug further with their doctors. This tends to support the benefit of marketers understanding Boomer needs and motivations. That is, since prescription drug advertising will focus on those most likely to have the problem for which it is the cure, chances are that Boomers will likely see themselves (or people looking like themselves) and their specific needs in the advertising.

Boomers and marketers

For some time now we have been tracking how Boomers view marketers and advertisers, with regard to their interest in providing Boomers with products and services they need, as well as interest in communicating messages of relevance and importance to them.

As we learned in all previous studies, Boomers continue to give marketers and advertisers failing grades.

• Three out of five rate manufacturers poor to fair with regard to understanding their interests in developing new products. Only 6 percent rate them excellent or very good.

• Three out of five rate those who create advertising poor to fair when it comes to understanding their needs and interests. Only 4 percent rate them excellent or very good.

In an effort to help clarify Boomers' reasons behind these attitudes, we added a series of questions to our most recent study. These questions assessed Boomer motivations connected with choosing a specific company or brand for its product or service - as well as the degree to which these motivations/needs are satisfied.

— Products/services and marketers: With regard to motivation for purchase, 70 percent of Boomers rated the following 9 or 10 on a 10-point scale: offers products/services that are reasonably priced; offers high-quality products/services; respects me as a customer; offers products/services that meet my needs.

With regard to satisfaction of these motivations, only one in three rate each of these 9 or 10 on a 10-point scale.

— Advertising and programming: Three in five Boomers feel that advertising in the major media would cause them to consider trying a product or service. The balance feel it has no influence at all.

Three in 10 believe that advertising should use actors and models their age if it wants to attract their interest. Half believe that TV programming should use more people their age. One in four are satisfied with television and television advertising as it is.

For the most part, Boomers continue to be disappointed with the degree to which marketers are satisfying their product needs. And, the majority feel that advertising is not speaking to them - in terms of message, or in terms of showing people like them using the products.

Profess interest

Marketers and their advertising agencies continue to profess interest in reaching the Boomer market with appropriate products. They have communicated their interest by recently sponsoring a number of conferences on the importance of reaching the Boomer market, as well as how to reach them (for example, a recent J. Walter Thompson-sponsored event).

Further, several major advertising agencies have publicized their establishment of departments or subsidiary agencies whose sole function they define as researching and developing programs to reach the Boomer market (including JWT). And, articles in the trade press have pointed with pride to the major efforts being made by marketers and advertisers to reach and attract the Boomers.

Based on the trends established by our research, the "success" of these efforts has been negligible to nonexistent. On the contrary, our findings indicate that Boomers continue to be dissatisfied, both with marketers offering products that meet their needs and with advertising that understands and addresses their needs and motivations.

In short, we have observed little change from the attitudes expressed by Boomers three years ago, when we first began to measure this subject.

Obviously, there is a lesson to be learned here. As evidenced by Boomer attitudes, marketers wishing to attract Boomer money need to develop products that meet Boomer needs. They also need to convince Boomers that they care and to promote these products with marketing and advertising programs that attract Boomers' interest.

Our current study offers some direction. We can see quite clearly that Boomers are savvy, up-to-date consumers, with a specific set of needs, motivations and behavior patterns. And, we can see that their needs, motivations and behavior are different from those of all other segments in today's marketplace.

For the most part, marketers seem either to not understand this, or choose to ignore it. The result is that in many instances, lack of marketer attention puts Boomers into the position of shopping and buying specific brands in many product categories primarily out of need rather than out of specific interest. In many of these categories, Boomers are more likely to shop on the basis of price and convenience, rather than out of brand/store loyalty.

This Boomer response to marketer inattention strongly suggests that if marketers want to build Boomer loyalty, those marketers had better show Boomers strong evidence that they understand Boomers are different, that they appreciate these differences and that they will address these differences in their products and communications.

Otherwise, to Boomers these marketers will remain just another brand or store, etc. They will attract Boomer business solely on the basis of price or convenience advantages - as opposed to building, addressing and satisfying Boomer needs and motivations.

Simply stated Boomers are the major segment in today's marketplace - in numbers and wealth. But despite their powerful status, all Boomers want is for marketers to treat them as they would any other segment. That is, understand them, speak to them, and give them what they want. | Q special markets: tweens

Seen by tweens

By Martin Lindstrom

Tweens (kids aged from eight to 14) are described as the "richest generation" and most influential generation in history. Their nations are, so far, not at war. There's an endless variety of disposable goods and leisure products designed specifically for them. They're sophisticated consumers, and thus they're a marketer's dream. But the marketer's dream has an ugly side - and this flipside is more akin to a nightmare.

These are the facts. An average child in the United States, Australia and the U.K. sees between 20,000-40,000 commercials a year (Leonhardt and Kerwi). According to a study done in 1999 by the Annenberg Public Policy Center, children spend 60 percent more time watching television each year than they spend in school. Children's financial spending has roughly doubled every 10 years over the past three decades. Today the tween segment alone is estimated to control and influence an astounding $1.18 trillion per year via its pocket money and its general influence on their parents' purchasing decision. And this is exactly where this generation differs the most from previous generations - their ability to influence their parents to a degree never seen before.

Three aspects of this generation make them extremely interesting. First, this is a very rich generation - with considerable financial potential and an ability to persuade their parents. Studying tweens across 11 countries we have learned that in most countries including the U.S., the U.K., Australia, Germany and Northern Europe, tweens have developed highly persuasive skills. They have well-planned arguments to help ensure that family purchases go their way.

Getting kids to notice your brand

This leads to my second point: tweens affect their parents' brand choices - even when the brand is aimed at the parents. The BRANDchild study reveals that in up to 80 percent of all brand choices, tweens control the final decision. Even when it comes to the choice of a car, more than 60 percent of all tweens had a substantial influence on the final decision. (BRANDchild is a study of tween attitudes and behaviors, conducted by Millward Brown, which involved surveying several thousand kids from more than 70 cities in 15 countries throughout Europe, Asia, the United States and South America.)

The third aspect refers to the cradle-to-grave phenomenon. At six months of age, a baby begins imitating simple sounds like "ma-ma."

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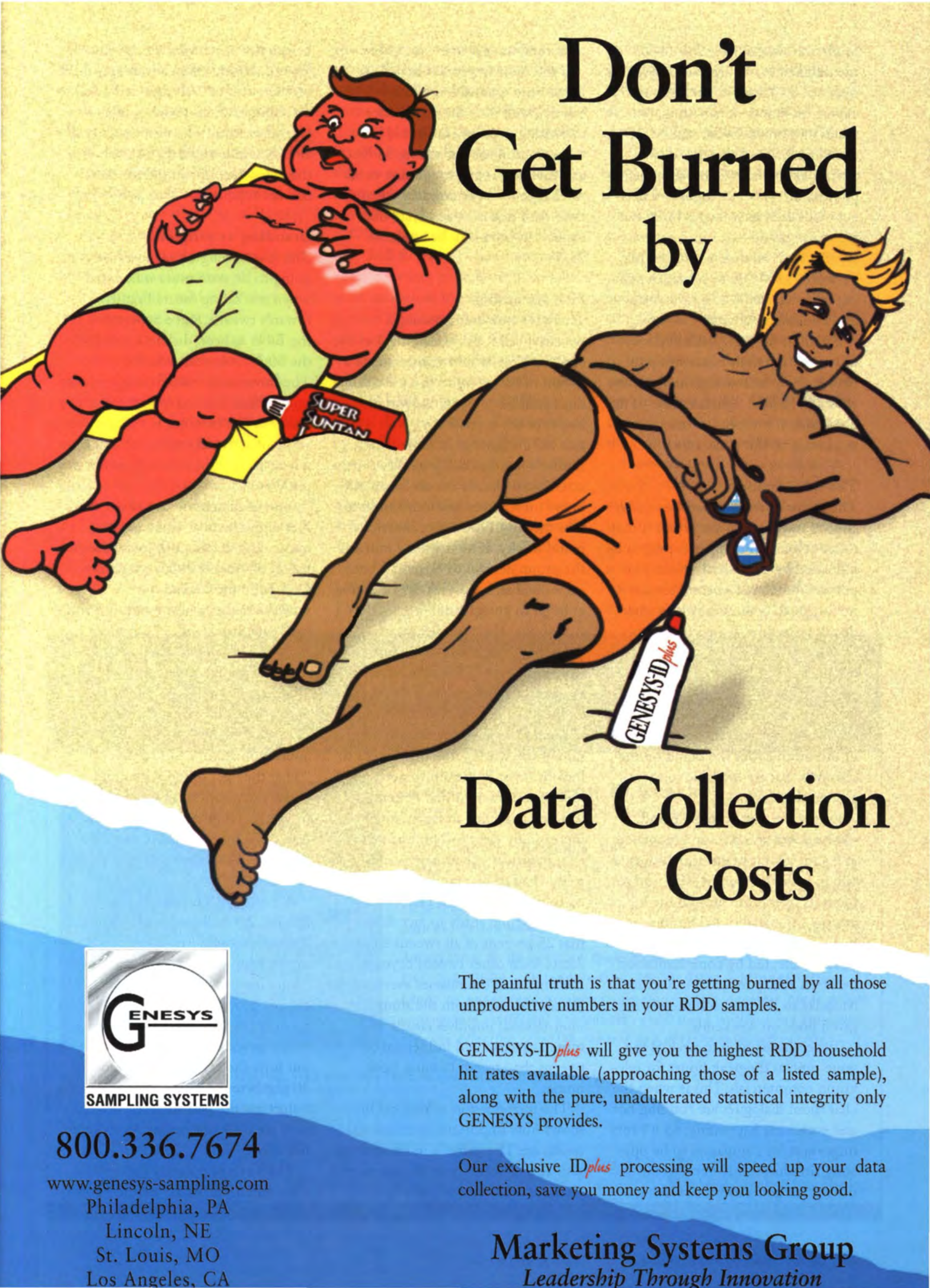
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Studies show that they also form mental images of corporate logos and mascots. Dr. James U. McNeal, an expert on kids and marketing, estimates that brand loyalty can be influenced from about the age of two, when babies begin forming mental pictures of corporate logos and mascots. Children as young as three can recognize brand logos, and experts say that each lifetime consumer may be worth $100,000 to a retailer, making effective cradle-to-grave strategies extremely valuable.

Based on the BRANDchild study of tweens and their relationship to brands, some interesting findings have emerged to shed light on some of the dos and don'ts when it comes to marketing to this generation.

The 24/7 brand

The major difference between today's tweens and those of yesteryear is that today's tweens no longer expect to be informed by traditional media. The purpose of television commercials is no longer to communicate product details to tweens. Today they simply aim to inspire. Once the inspiration has kicked in, then ideally the brand will become interactive as there will be other channels that will do the informing. Tweens will seek more information about the brand on the channels that are available to them around the clock.

Forget the days where a brand closed down at 5 p.m. and reopened at 9 a.m. If your brand truly wants to talk to today's tweens it will need to focus its operations around the life of tweens - not traditional business routines. This audience might very well be most affected by communication between 2:00 p.m. and 11:00 p.m. Monday to Friday - and then at any given hour on weekends.

Tween hours tend to peak at the same time as the peak hours for television commercials. This is when the chat room dialogues are running hot, and events are happening. So it's very important for companies to be operating simultaneously because this is the instant generation, and if they hear of something new and exciting then they want it to be accessible.

If the most important brand dialogue time is considered to be Sunday, well then the head office marketing department should be there to monitor the action. So first and foremost, operating hours need to change to accommodate the audience. And this is an audience that expects its brands to be available 24/7.

Fish streaming

There is a new trend amongst tweens. I call it fish streaming. Let me explain. How would you persuade a stream of fish to swim in a certain direction? Would you target the leader of the crowd? If so, who would that be? Tweens are in some ways similar - not one but several tweens, interlinked, decide the direction, the brand preferences and trends, and so take the lead. Notions of individual brand loyalty don't exist any more. If the group decides to boycott a brand, no individual loyalty would be strong enough to go against it.

However the complex set of dynamics doesn't stop here. A tween fish stream involves much more than targeting tweens in one particular geographic area, because the true influence can extend to the other side of the world. One only needs to look as far as Pokèmon to get a good idea of the reach. When Pokèmon was first launched in Japan, it was increasingly clear to Nintendo that the characters - their names and their roles - had to be dramatically adjusted to the U.S. market. The BRANDchild study in fact shows that 25 percent of all tweens communicate with other tweens beyond their national boundaries every week. We also learned from the study that international impulses clearly are more attractive and influential to tweens than trends coming from home.

The introduction ofYu-Gi-Oh! shows how important international trends are. The game is in many ways similar to Pokèmon or Dungeons and Dragons, but by now many U.S. tweens had already discovered it, long before it was actually launched. They'd already taken advantage of the proliferation ofWeb sites dedicated to informing tweens about current Japanese trends. As a result, kids had already familiarized themselves with the characters learning from their friends in Japan.

Branding as religion

The role of religion is most likely going to be even more influential when marketing future brands towards tweens. Since September 11, the Bible as been on the Lycos list as the 50th-most-searched-for term. The movement towards religion not only offline but also online cannot be ignored. The Internet is a major purveyor of spiritual expression at a time when spiritual hunger is growing in the West.

One of the crazes that swept the Net didn't involve video games, music downloads, geek jokes, dancing babies or cracker codes - it involved God. Millions flocked to www.reata.org, a homespun site run by Reata Strickland, a Tuscaloosa, Ala., Sunday school teacher who took a short, anonymously written "Interview with God" and set it to Shockwave animation. An example: God is asked what's most surprising about humankind. God answers: "That they get bored with childhood. They rush to grow up and then long to be children again. That they lose their health to make money and then lose their money to restore their health."

According to Jupiter Media Metrix, 2.4 million people visit the site each month. And all of this attention is happening by word of mouth. There has not been a single advertisement for the site, it's barely rated a mention in the media and all the while Strickland is trying to figure out how she can pay for the cost of 40 gigabytes of bandwidth a day - the t-shirt, mouse pad and screensaver sales are only just managing to keep her afloat.

The site's popularity comes at a time when Christian-themed entertainment is playing an increasingly central role in mainstream culture. The apocalyptic Left Behind products have sold more than 40 million copies and continue to be a national phenomenon. Parents have so far bought over 22 million copies of the Christian-based children's videos Veggie Tales. And according to a *Newsweek* cover story, "Jesus Rocks," contemporary Christian albums sold more in 2002 than jazz, classical and New Age genres combined.

The BRANDchild study shows that more than a year after September 11, 56.1 percent of all tweens across the globe found the word "religion" important - with U.S. (76.6 percent) and Brazilian tweens (78.8 percent) expressing the most reverence for the word. Given the widespread anti-God message that has existed in recent history in China, it's not surprising that only 20.7 percent of all Chinese tweens considered religion important.

The Nordic Youth Research Organization released the results of a study on civic participation among young people in Europe in 2000. It reveals that over the past nine years, active church membership was the fastest-growing trend among tweens. It goes on to state that there's been a fivefold increase in church memberships in central-western Europe and north-western Europe. In south-western Europe, this has increased tenfold.

What's the concrete result of all this? Well first of all your branding needs to reflect trust, it needs to sell a spirit and needs to reflect a bigger picture. The days where one single product could take the world by storm are long gone. Today we are talking about tween concepts - representing a raft of products fulfilling several different needs, all represented by one brand. Pokèmon, Ninja Turtles, Harry Potter…you name it. They've all succeeded because they spread their wings in such way that they almost became a "mini religion" - a belief the tweens could admire.

1-800-PROVEIT

This is a no-BS generation. Tweens put a premium on straight talk and are drawn to brands which display utter confidence and offer full-on accountability. Given the many corporate collapses, the "grown-up" world has hardly proved to be a role model of honesty and transparency. But in light of this, the emerging trend clearly leans towards straight talk.

Procter & Gamble is a huge company which has launched several campaigns based precisely on this straight-talk philosophy. Their Old Spice High Endurance deodorant put its reputation on the line with a money-back guarantee and an invitation to phone 1-800-PROVEIT. The tweens love it - and they've embraced the brand and the product.

However this is also a generation which loves irony. A brand that so much as hints at feelings of self-importance will secure itself a permanent space in the tween-product graveyard. However the opposite attitude could provide just the ticket to brand stardom. A sense of irony is definitely the way to this generation's heart. Tweens hate brands that take themselves too seriously, but embrace those that are able to have a laugh at themselves.

The Yoo-hoo Chocolate Beverage Corp. is not afraid to make fun of itself by sending a garbage truck painted in the brand's signature yellow and blue to hand out samples of its chocolate milk. The man behind the drink, the top flavor guru, is Dr. Yoo-hoo, who's introduced as "The Tsar of Tastiness! The Sultan of Scrumptiousness! The Maharaja of Mmmmm."

On the Yoo-hoo site you can download wallpaper of Dr. Yoo-hoo's picture and it's of a quality that can hardly be called professional. You can also sneak a peek of the secret formula that goes to create the Yoo-hoo drink...but be warned: the sneaked peek is of a picture of Dr. Yahoo standing in front of a safe!

When Yoo-hoo mounted its Stinkin' Summer Tour tweens flocked to hear groups like Blink-182 and listen to "the gospel of Hoo." So the whole tour managed to integrate the message and the brand, and needless to say the tweens were drinking Yoo-hoo in "every town, parish and raging metropolis" across the United States.

Reviewing product placement

The BRANDchild study has confirmed what we have long suspected about the ongoing questions relating to product placement. Based on the qualitative segment of the research, we learned that rather than looking to traditional media, tweens take their brand cues from how the brand actually performs in various communities. Interestingly, we learned that product placement is the largest and most influential form of endorsement influencing tween brands. In almost all our group studies we learned that a substantial part of tween brand perception is either built on a general opinion within the tween community or is the result of product placement seen on television programs like *MTV Cribs* - where several products seem to grow their brand equity.

From a parent's point of view the good news is that tweens have no trouble separating the commercial from the editorial content. The bad news is that we will probably be seeing an increasing blend of ad and content. When the movie *Blade Runner*, adapted from a Philip K. Dick novel, was released, it featured huge neon ads for numerous big corporations. Twenty years later, *Minority Report*, another adaptation of a Philip K. Dick story, included product placements of 30 brands. The James Bond movie *Die Another Day* has been nicknamed *Buy Another Day* by some because it contains product placements worth $100 million.

The merger between entertainment and advertising is likely to grow even stronger as industries touch all bases in their attempts to reach tweens Product placement will soon become as commonplace on computer games and mobile phones as it already is in most Hollywood movies. For a generation who's used to a total separation between these two worlds it sounds horrifying. But, as long as brands stick to the truth and fully acknowledge a commercial payment is part of the deal, they will succeed.

I'll go further and venture to say that hardly a tween brand will survive in the future unless they include elements of product placement in their strategy. It will never be the driving marketing vehicle, but there's no doubt that product placement and establishing an online presence will become a vital element in launching a brand aimed at a tween market.

So where does all this leave the tweens...and us? It is clear that what we learned about tweens only 10 years ago is now significantly out of date. Brands will become increasingly digital. They will involve electronic screens, pocket computers, mobile phones and personal computers - they will work across multiple platforms - targeting tweens across multiple dimensions. Merchandising opportunities have taken center stage, and brands straddle online and offline worlds. In fact this bridge that brands create helps secure the life of a product so that it can extend beyond the three-month average for any fad.

Tweens have become the most influential brand gatekeepers - so as you develop your marketing plan and define your audience, bear in mind it's no longer just simply child's play! | Q

research software

Heating up, cooling down

By Andrew Jeavons

A look at what's hot and what's not in the research software industry

There is certainly no shortage of market research software. The software directories at www.quirks.com and Tim Macer's Web site (www.macer.co.uk) list hundreds of packages. A quick search on Google for the words "market research software" nets a lot of hits. Even eBay has listings for market research software!

It's obviously partially the result of the Web. The nature of the Web lends itself to the development of interviewing systems, thus the number of Web interviewing systems has skyrocketed. When the Web as we know it was invented it was based on a document-linking technology called hypertext. It was read-only, and interaction was limited to jumping from document to document. However in a short space of time features were added to enable information to be collected by the Web browser software and passed back to the Web server for processing. The Web then gained a structure that made it a question-and-answer-based environment. CGI scripts (common gateway interface) that process information from Web forms on the Web server served as the starting point for Web interviewing systems. A fundamental feature of the Web is to ask questions and provide an answer (search engines for instance).

CATI software hasn't had such a growth, and this is almost certainly because is far, far harder to develop than Web interviewing software and a lot harder to sell. The belief, which was largely erroneous, that there was a huge amount of money in Web interviewing software led to a rash of Internet start-ups, very few of which have survived. I'm willing to bet that those who have survived now realize that survey software is not a gold mine.

Business models have mutated drastically. The sheer volume of software available for Web interviewing now means that Web interviewing software is getting close to being a commodity, which is a mixed blessing for the buyers. It means that you can buy on price, but it also means that quality software, which you may need, faces a tougher time surviving. Cheaper is not always better in the long term.

The survey software world is, at the moment, an interesting place. In this article I'm going to emulate (with all due acknowledgment) *Wired* magazine's Wired/Tired/Expired feature for technology and culture

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and present a view of what's hot and what's not in the survey software world.

***Not*: Web interviewing software.** Enough already. There are more systems than you can shake several sticks at and it's getting hard, very hard, to tell exactly what is unique about each one. Do we need any more? Well, unless it has some really unique features - and "drag and drop" questions, customized JavaScript pages, thin client scripting systems with tree-based questionnaire views and embedded Java applets aren't unique - then I don't think we do. We're still stuck with CATI-on-the-Web and there is little sign of any real innovation from anyone, be they dot-coms or established vendors. What about quality control metrics and procedures for Web interviewing? Because Web interviewing is completely software based we have a unique opportunity to track what is going on in an interview and use this to improve the quality of the data and the quality of the experience for the respondent. E-mail sample management systems? How about making the interviews more FUN (and providing some technology to help do this)? When we lost the interviewer in the transition from CATI to the Web we also lost the ability to drag a respondent through 45 minutes of mind-numbingly tedious questions. People just quit now; there's no bonding with the interviewer. We can't rely on the "just a few more minutes..." gambit anymore. Web interviewing software is facing a real challenge now as surveys carried out on CATI are moved to the Web. A lot of these CATI surveys are very complex and the newer Web interviewing systems simply can't cope with them.

***Hot*: More online qualitative software.** This is one of the new frontiers for survey software. The Web is very good at connecting people, we just need some new ways of gathering information from groups. It's well documented that open-end responses on traditional Web questionnaires tend to be longer and more detailed. On the back end of this there is a place for automated text analysis programs. I would never propose that software can replace the insights of an experienced researcher, but a lot of work has been done on text processing and now we have the computer power to make it work for market research.

***Not*: Data file formats that smell of punched cards.** The Jacquard Loom was first developed in 1801. There doesn't seem to be a good reason to be commemorating it in 2004 with data file formats that trace themselves back to punched cards, which in turn were inspired by the Jacquard Loom. Multi-punch was a good idea at the time, but this isn't the time. Relational databases make good data repositories. There are still all sorts of issues to be resolved over how survey data should be organized for databases and how to do efficient processing of the data, but for data management and process reporting you can't beat a database.

***Hot*: Panel management software.** There has been a huge growth in the use of panels in research, mainly driven by the Web. This hasn't been reflected by a growth in the availability of panel management software. Only two companies come to mind for this type of software, Nebu and GMI. What is needed is community management software, systems that track incentives, sampling, usage, panelist responsiveness and communication with the panelists. Instead of new Web interviewing systems, how about more panel management systems? I suspect the issue is the same as with CATI software: it's hard to develop something that is appealing to enough companies.

***Not*: CAPI software.** CAPI took off in Europe years ago. In the U.S. it has a firm place in social research circles, but for market research in the U.S. it seems stuck. It's more likely that in-person interviews will now take place via the Web in Wi-Fi hot spots or using GPRS cell phone connections. The problem of CAPI was sample management (hard) and machine costs (high). These days with a Web-enabled cell phone you may well be able to do quite a lot in person for very little cost. CAPI should be hot. The regulations governing cell phones mean that it is illegal to call them at random if the call recipient is charged for the call. Add to this number portability, so that subscribers can switch their land line number to their cell phone, and suddenly in-person interviewing has a whole new appeal. In theory you can obtain a list of numbers that have switched from land lines to cell phones, but the provision of this list is way behind (see www.neustar.com). And that is without the issues raised for CATI with the new DNC (do not call) list.

***Hot*: CATI software.** It's certainly true that CATI is no longer in quite the dominant position it was in for data collection a few years ago. Joe Rafael, chairman of Opinion Access Corp., commented at a recent CASRO Data Collection workshop that "CATI, like Rodney Dangerfield, gets no respect." He's right. The Web has certainly changed the landscape for interviewing, but CATI isn't going away anytime soon in the U.S. or the rest of world. The economics of CATI are in flux because of offshore collection (Canada, India, etc.) taking off. CATI is now becoming integrated with Web interviewing, so-called "mixed mode" systems. The logistics of running CATI in remote locations is leading to new software (such as that from CfMC, Sawtooth and Pulse Train) to cope with distributed and mixed-mode CATI. There is even a chance that voice over IP (VOIP) technology will finally, really blend the Web with telephone interviewing. The commercial pressures in CATI are leading to changes in the form of CATI software packages. Sample management systems are now coping with different sorts of modalities. It's only a matter of time before paper interviewing joins the mix of mixed mode to give respondents a choice of modalities in which to complete questionnaires.

The DNC list is another challenge for CATI (and sample providers). It may seem like it restricts calls even more (whatever the regulations, a lot of DNC list members feel they should be exempt from calls for surveys even if this isn't the case). There is a chance that the respite from telemarketing calls may make DNC list members more receptive to calls from research companies. Maybe CATI will get its respect after all.

***Not*: Microsoft.** I don't subscribe to or agree with attacking any specific company, as is the fashion with the detractors of Microsoft. But there are some numbers that indicate that Microsoft is failing to dominate the Web server market. Netcraft (www.netcraft.com) publishes a monthly study on the software used by Web servers. In December 2003 it tested 45,980,112 Web sites and found that 79 percent of them were not running Microsoft's Web server products. In 2002 I did a small survey (via Netcraft) of the Web server products being used on the Web sites of the Fortune 100 and the world's top 25 market research companies. I repeated this survey at the end of 2003. The chart shows the results.

Microsoft Web server product useage

	2002		2003	
	MR Companies	Fortune 100	MR Companies	Fortune 100
Using Microsoft Web server products	67%	34%	56%	30%

Of course there are corrections applied for availability of information, and mergers, etc. I used the same list for 2003 as for 2002 for consistency. It's clear that MR companies tend to like Microsoft products for Web servers, whereas the Fortune 100 don't. It's also interesting that there has been a small shift to non-MS-based servers in the MR companies (but with a sample of 25 sites, I don't think too much can be made of that). Extrapolating these figures further is risky, but it must say something about the computing infrastructure of Fortune 100 companies as compared to research companies. Does it matter? Maybe not. But with research companies becoming more involved with software as a way of adding value to their research findings, having some infrastructure in common with large potential clients may not be a bad idea. Talking the same language as your clients on all levels never hurts.

***Hot*: Using software to make money**. Software is a way for research companies to make money. It isn't just an infrastructure overhead. Using software to develop unique products for the research marketplace is a challenge, but it isn't impossible. Research companies will always do market research and add value to information, but the mode of delivery to the client of these insights is becoming more important. Excel and PowerPoint were great in the '80s and early '90s, but it's 2004 now. Technologies such as XML (extensible markup language) allow all sorts of information to be packaged in a form that allows clients to integrate it with their business processes far more easily than before. Research companies all want to be seen as an integral part of companies' management process (repeat business!). Software can help this to happen. Become a part of your client's desktop!

Post-Web era

The influence of the Web on survey software, now that we are in the post-Web/Internet era, seems to have concentrated on front-end, data acquisition tools. Web-based data/client portals are growing in use, but nowhere near as fast as the front-end Web tools which have gained acceptance. The Web has distorted the survey software marketplace; it's time for some balance to return. It's a fact that the back-end tools have been neglected by the software developers to a large extent. Every day unglamorous software like Quantum, Merlin, Mentor and Uncle run thousands and thousands of crosstabulations which still form the core of many research companies' analysis process. Like the venerable computer language COBOL, these programs are not going to die anytime soon, and there doesn't seem to be much new around to take their place. An industrial-strength crosstabulation system that can use a relational database intelligently would be really useful.

We've got a lot of survey software available compared to 10 or 20 years ago. The question is, is it focused on what the research industry needs or what is easier to develop? Now that some of the hype has subsided from the Web we may see some progress in the neglected areas of need. Market research was an early adopter of computer technology because parts of market research really need software. If you make widgets then software can help you do that, but you probably can get by without software. The challenge for the software vendors focused on market research is to move their products from an overhead and infrastructure role to a revenue generation role. Return on investment is the issue. The challenge for the research companies is to take the opportunity that software provides and use it to make money. Q

Make A Note: ActiveGroup Continu

In 1999 ActiveGroup revolutionalized qualitative research when we became t first company to video stream a focus group over the internet. Clients could th watch their groups from their own computer with no need to travel to the facil 28,000 hours and 6000 projects later ActiveGroup is the leader in the fie

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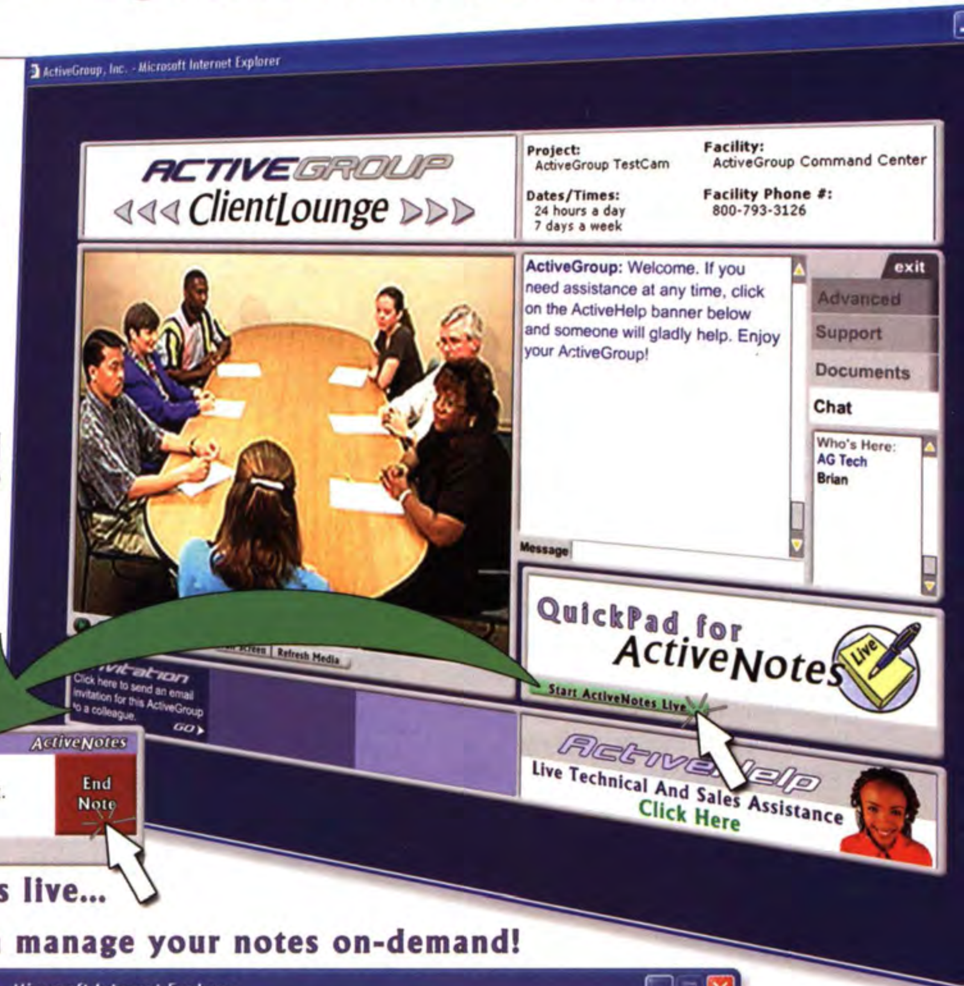

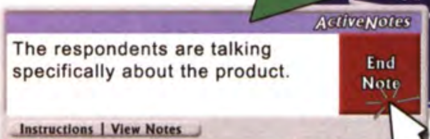

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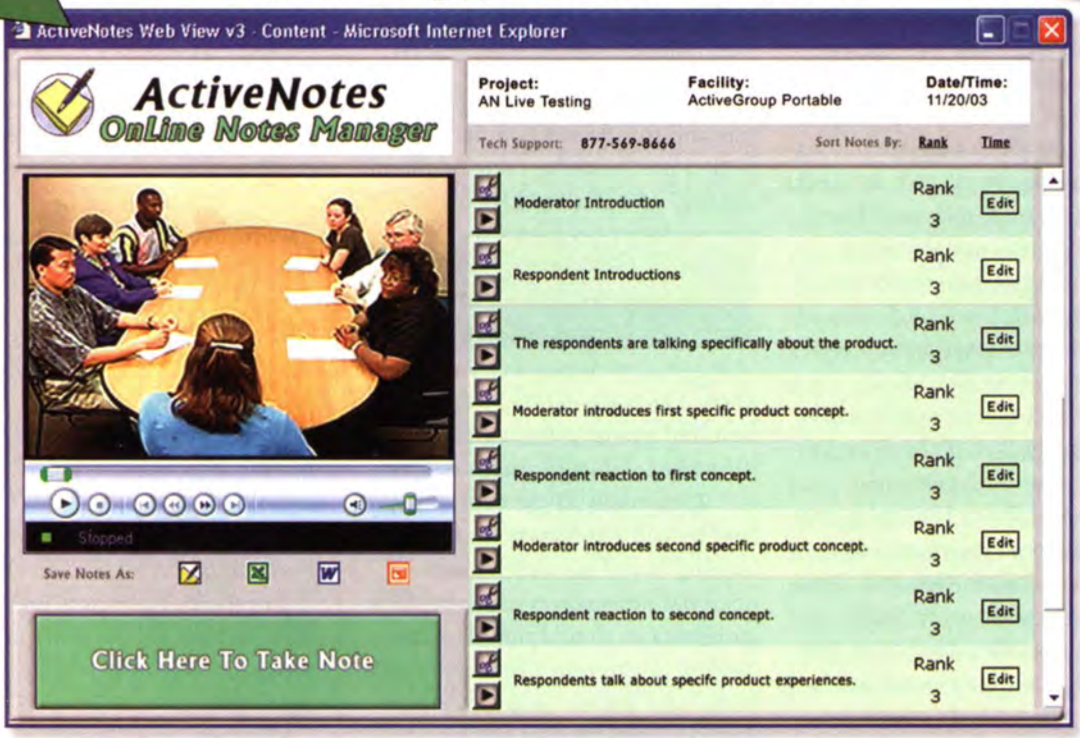

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Survey Monitor

continued from page 8

choices) and 29 percent (audio electronics choices) of all GLB respondents responded that targeted advertising to gays and lesbians was a specific reason for them to prefer one brand to another in these product categories.

These findings are from a nationwide Witeck-Combs Communications/Harris Interactive study of 2,376 adults, of whom approximately 7 percent self-identified as gay, lesbian or bisexual. The survey was conducted online between November 17 and 23, 2003.

An earlier study by the same two firms showed that GLB consumers tend to read and view many of the same forms of media as their heterosexual counterparts. However, across the board, they favor lifestyle, home decorating and design magazines, news magazines, and premium cable networks more than their non-gay counterparts.

Sixty percent (60 percent) of GLB individuals frequently or occasionally read mainstream news magazines such as *Time* and *Newsweek*, while the same is true of 45 percent of heterosexuals surveyed. In addition, 41 percent of GLB consumers say they read lifestyle, home decorating and design magazines, such as *Martha Stewart Living* or *Architectural Digest*, frequently or occasionally when compared with 30 percent of non-gay respondents. More GLB consumers also report watching premium cable networks like HBO, Showtime, and Cinemax frequently or occasionally than do heterosexuals (52 percent to 45 percent).

When asked about readership patterns for national gay magazines, such as *The Advocate*, *Out*, and *Curve*, one-third (34 percent) of GLB respondents say they read these publications frequently or occasionally. However, when asked about news sources that allow for great anonymity such as online channels like Gay.com and Planetout.com, over four in 10 (41 percent) GLB individuals surveyed frequently or occasionally visit gay online channels. One in five (19 percent) GLB respondents also report they frequently or occasionally read their local gay newspaper.

"These data support our earlier research that revealed gay and lesbian consumers are media-hungrier than ever and seek information and entertainment from both mainstream and gay channels," says John Butler, senior strategist at Witeck-Combs Communications. "Corporate marketers should consider the options as they develop strategies to reach their gay and lesbian customers. The companies that succeed in capturing their share of the GLB market's estimated $450 billion in buying power will do so by placing inclusive ads with tailored messages in places where GLB consumers find information.

"The increased inclusion of openly gay and lesbian characters and programming on premium cable as well as network programming means GLB people are tuning in more than ever. Programs like Showtime's *Queer as Folk* and NBC's *Will and Grace* also attract a large crossover audience, persuading more companies to tailor advertising messages to gay and gay-friendly audiences - a technique shown to increase brand loyalty," says Butler. "Opportunities for product placements also should not be overlooked. This is a simple, yet effective way to connect with a diverse audience including both gay and non-gay consumers. Bravo's new show *Queer Eye for the Straight Guy* featured products from GMC and Wilsons Leather, for instance.

"With nearly 20 percent of gay and lesbian consumers reading community-based gay and lesbian regional newspapers regularly, these publications should not be overlooked as a resource for media planners," says Butler. "They offer marketers a cost-effective solution to guiding these sought after consumers directly to a product or service." For more information visit www.harrisinteractive.com or www.witeckcombs.com.

Tweens show marketing savvy

New York-based BuzzBack Market Research's recent advertising survey reveals tweens (8-12-year-olds) are more savvy to advertising, product placement, celebrity endorsement, and product branding than commonly understood. They know what motivates them to buy and where to shop.

The opinion of tweens impacts the future of advertising, brand development, product placement and shopping. BuzzBack's Tween Advertising Survey elicited quantitative and qualitative feedback from over 500 participants, ages 8-12, across the U.S. and in a variety of socioeconomic levels. Survey results reveal trends on tween attitudes toward advertising, product purchasing motivation, favorite places to shop, as well as their attitude toward themselves, family, school, and what's important to their age group, e.g., "fitting in." Trends are based on age, gender, and placement within the family. In compliance with COPPA regulations parental supervision was required for the tween participation.

An overview of the results:

• Brand sophistication: 94 percent of tweens have heard of the word "brand" while 75 percent say they notice brands associated with stars in movies and TV.

• Ad savvy - most commonly recognized ad types: TV commercials (92 percent), billboards (78 percent), radio commercials (73 percent), product placement (approx. 50 percent).

• Product placement recognition: Restaurant/cereal box movie tie-ins (52 percent), characters on shows using brands (51 percent), and cartoons based around branded toys (47 percent).

• Star endorsement: 72 percent admit that seeing their favorite stars using a brand makes them want to use the brand.

• Tweens enjoy entertaining advertising: ads are "funny" (43 percent), "informative" (39 percent), and "interesting" (35 percent).

• Less than 50 percent of tweens watch TV Ads: 19 percent get up and do something else, 18 percent change the channel, 12 percent stay seated, but do something else, 2 percent don't watch TV at all.

• *American Idol* brand association results (48 percent of surveyed tweens watch the show): 61 percent say they remember seeing commercials while watching the show; 56 percent remember seeing *AI* stars using certain brands (76 percent of whom consider this a form of advertising - females [80 percent] vs. males [67 percent]); 48 percent believe *AI* stars really do use the products they endorse; 95 percent of those who do not believe the *AI* stars use the products say it doesn't affect their purchasing behavior.

• Other influences: tweens recognize what's "cool" two ways: 1) celebrity-endorsed advertising, and 2) what the "cool" kids at school are using and wearing.

• Favorite stores to shop (open-ended question): Wal-Mart (29 percent), Toys R Us (23 percent) and Target (7 percent). For more information contact Carol Fitzgerald at 646-519-8010, ext. 1 or visit www.buzzback.com.

2003's top new product innovations

The U.S. economy roared back to life in 2003 and so did consumer packaged goods companies, who collectively launched a record number of new products in 2003. All told, packaged goods firms churned out 33,678 new food, beverage, health and beauty aids, household and pet products during 2003, according to the Productscan Online database of new products from Naples, N.Y.-based Marketing Intelligence Service.

2003's new product total was 6 percent above 2002's total count and well ahead of 2001, the previous record year for new products.

A near doubling of no- and low-carbohydrate product launches in 2003 helped pad the year's new product count as companies rushed to jump on the bandwagon of the year's hottest new products trend. 2003 was also a big year for pet products, with product launches up over 68 percent from 2002's tally. Despite all of the new products, relatively few were truly new and different. Just 8.5 percent of 2003's new products earned an Innovation Rating. Productscan Online's Innovation Ratings tally the number of new products that offer breakthrough features or benefits in any one of the following six areas: formulation, positioning, packaging, technology, creating a new market, and merchandising.

If there was a theme that typified 2003's "Build a Better Mousetrap" award winners, it would be saving time and making everyday life simpler and easier. The 10 new products below were chosen by Productscan Online as the year's top innovations from the more than 30,000 new U.S. and Canadian introductions reported in 2003 by the database.

Cereal is great in the morning, but milk and cereal aren't well suited for travel. Battle Creek, Mich.-based Kellogg Company has fixed that problem with an ingenious new cup for its Kellogg Drink'n Crunch Portable Cereals. The cup is actually two cups in one; an inner cup contains cereal while an outer cup is to be filled with milk. The cereal and milk mix in your mouth, not in the cup, so the cereal never gets soggy. All this without a spoon or a bowl. Look for Drink'n Crunch in Kellogg cereal varieties like Froot Loops Minis Low Fat Granola, Tony's Frosted Crunch and Low Fat Granola.

New Product Introductions: 1994-2003

1994	21,986
1995	20,808
1996	4,496
1997	25,261
1998	5,181
1999	25,928
2000	31,432
2001	32,025
2002	1,785
2003	3,678

Source: Productscan® Online

Chocolate lovers have a reason to celebrate with Hershey Foods' newest innovation. The Hershey, Pa.-based chocolate maker set the candy market on its ear with the launch of Hershey's Swoops Candy Slices. Shaped like potato chips, Swoops are a brand new shape in chocolate to "envelop your mouth in chocolate bliss." Better yet, the slices are packaged in six-count cups that easily fit into a lunch box or bag for a quick treat. Swoops are available in flavors like Hershey's Milk Chocolate, Reese's Peanut Butter Candy and York Mint Candy flavors.

Health experts estimate that half of all American adults have blood cholesterol levels that are higher than they should be. That number could drop if Coca-Cola's Houston-based Minute Maid Company has anything to do with it. The company's new Minute Maid Premium Heart Wise 100% Pure Orange Juice can lower cholesterol levels with two 8 fl. oz. servings of orange juice per day. An 8 fl. oz. serving of Heart Wise contains 1 gram of plant sterols, the ingredient responsible for the cholesterol-reducing effect.

Now there's a new way to make cookies and cakes come out of the oven better than ever with new Pam for Baking with Flour. Featuring flour as an ingredient, this one-step product combines no-stick Pam with flour so that everything from cakes and muffins to bread and brownies turns out just right with less cleanup.

According to Johnson & Johnson, the maker of new Aquafresh Floss 'n'

Cap Fluoride Toothpaste, just 2.5 percent of U.S. households floss regularly. Floss 'n' Cap, a new toothpaste that contains floss inside of a cap located at the top of each toothpaste tube, makes it hard to forget to floss. The unique dispenser holds shred-resistant floss and detaches from the toothpaste cap should one finish the toothpaste first.

In a world of disposable products, why do most Americans re-use their toilet brushes? Maybe they won't for long if Bonita Springs, Fla.-based Prestige Brands International is successful with its new Comet Clean and Flush Flushable Toilet Cleaning System. Convenient and sanitary, the system consists of a cleaning wand and five flushable, cleaner-infused brush tips. Since the Comet cleaning solution is contained in the brush tip, there's no need for liquid cleaners. Simply snap on the brush tip, clean the bowl and flush the brush tip down the toilet when finished.

Plastic wrap is a product that can be frustrating to use, especially if it sticks to itself. New Glad Press'n Seal Sealable Plastic Wrap is different. Featuring Griptex adhesive right on the sheet, Press 'n Seal sticks where you want it, when you want it for a tighter seal than ordinary wraps. Oakland, Calif.-based Clorox Company invites consumers to take the Press'n Seal challenge by covering a cup filled with liquid and turning the cup on its side to demonstrate the spill-proof seal. Kids, don't try this at home!

Shaving is a time-consuming and messy task that many women hate. The Schick Intuition Refillable Razor from Milford, Conn.-based Pfizer, Inc. simplifies the job by smoothing and soothing the skin while shaving. The razor's triple blades are actually set in the center of the Skin Conditioning Solid bar so that the razor lathers and shaves in one easy step. Intuition comes in Sensitive Skin and Normal to Dry Skin varieties.

New Domestic Products by Industry (1999-2003)
as reported in Productscan Online (www.productscan.com)

	Foods	Beverages	Health & Beauty Aids	Household	Miscellaneous	Pet Products
1999	11,626	3,069	9,519	872	296	546
2000	13,373	3,541	11,747	1,695	349	727
2001	13,200	3,777	11,597	2,088	569	794
2002	13,452	3,584	10,979	2,091	814	865
2003	14,812	3,984	11,139	1,546	739	1,458

Note: The "Miscellaneous" classification includes tobacco, car care and items related to foods, beverages, health and beauty aids and household products.

Tough cleaning jobs like crayons on walls, scuff marks on floors, soap scum in bathtubs and set-in dirt on stoves and refrigerators are a challenge for any cleaner. Now there's a single cleaner that will tackle these and a multitude of other tough cleaning tasks. The Mr. Clean Magic Eraser is a sponge-like "eraser" that is made of a unique cleaning material that penetrates surface grooves where dirt and grime get trapped. It breaks up tough dirt, lifting it away from surfaces after being activated with water. These disposable cleaning pads are new from Cincinnati-based Procter & Gamble.

A little bit of bleach can go a long way, especially bleach packaged in big plastic bottles. Now there's a better way to bleach just what you want to and leave everything else alone. The Clorox Bleach Pen is a gel pen that is ideal for laundry and household use. Equipped with a dual tip, the pen is perfect for stains like grass, red wine and tea on most white fabrics or around the house on grout and caulking or areas around sinks and tubs.

International product launches never cease to amaze. Among the innovations that didn't make this year's mousetrap list were asparagus-flavored cottage cheese from Germany and a bird's nest beverage from Thailand. The top innovations presented below prove that some of the most intriguing innovations come from overseas markets.

Comfort Fast Dry Fabric Conditioner is a liquid fabric softener innovation from the United Kingdom that actually helps clothes dry faster by removing more water from clothing during the washing machine's spin cycle.

Cheese makes a great snack, but sold in block form, it's not convenient. Dalter Parmi Petales Parmigiano Reggiano Cheese is a brick of cheese mounted on a circular grater; simply turn the brick to cut the cheese. It's new in France.

Kids love frozen novelties, but they melt quickly in hot weather and often end up on clothing. Not with Iceland Kids Crew Jelly Lollies, which is new in the United Kingdom. When removed from the freezer, this frozen confection begins to defrost and slowly turns into a fruit jelly while maintaining its shape.

With flu season upon us, the world may indeed be ready for the Thermofocus Infra Red Thermometer that is new in the United Kingdom. This thermometer is a battery-operated device that detects infrared radiation from the surface of the forehead to render an accurate reading.

Want to make your own wine at home, but don't have the time or expertise? No problem with new Jacoby Traubenmost zum Selbermachen von Federweissem. New in Germany, this grape juice product is packaged in an aseptic container with a plastic screw cap. Once opened, yeast contained in the cap drops into the juice, which then turns into wine. For more information visit www.productscan.com.

Frozen pizza industry leaves consumers wanting more

Barely an adult in the U.S. today has not succumbed to the combination of taste and fast-food convenience that is frozen pizza, according to a nationwide survey by Decision Analyst, Inc., Arlington, Tex. Yet despite near universal consumption (93 percent of respondents), the survey (conducted among a nationally representative sample of 15,007 adult consumers) found many Americans dissatisfied with their pizza choices.

The largest brands cannot complain of a lack of public exposure - more than half of survey respondents have eaten pizzas from Tony's, Di Giorno, Tombstone and Red Baron (Tombstone tops the list, with 74 percent having sampled its products). Yet among these market leaders, only Di Giorno ranked among those pizzas consumers will likely purchase again. Specialist producers California Pizza Kitchen and Freschetta are, with Di Giorno, the most likely to be tried again (between 62 and 65 percent of respondents), while Tombstone and Red Baron struggle to attract half of the first-time users to return to their products.

"The data shows that no more than two in three consumers would try any frozen pizza brand again," says Decision Analyst, Inc. Vice President Bruce Crandall, who supervised the study. "In other words, at least one-third of consumers will switch to another brand or refuse to buy frozen pizza again."

The reasons why people buy pizza offer few consolations to the manufacturers. Taste is the No. 1 factor affecting purchases (with 36 percent), followed by prior experience (23 percent) and value for money (15 percent).

"The pizza producers have a real challenge on their hands to persuade consumers to sample, or resample, their pizzas," says Crandall. "Consumers clearly want good prices, but they also want excellent taste, and that means it's back to the test kitchens if the manufacturers - especially some of the largest sellers - want to keep their customers satisfied." For more information visit www.decisionanalyst.com.

Product and Service Update

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ness focus to include product development and branding work in the consumer products market. The systems designed to support this work include: new consumer-oriented tools and technologies for creating more engaging online survey environments; new consumer panel and double-opt-in sample sources, including an expanded relationship with Wilton, Conn.-based research firm Greenfield Online; and new management and project specialists devoted to developing new programs specifically for the consumer products market. For more information visit www.sotech.com.

ACNielsen has dollar-store data

ACNielsen U.S. is now offering account-specific sales tracking and analysis for Fred's, Inc., a dollar-store chain that operates over 500 stores, mostly in the southeastern United States. This is the first time that account-specific sales information from a dollar store chain has been available. ACNielsen's analysis for Fred's is based on UPC-level point-of-sale data. Manufacturers who work with Fred's can see their products' performance in Fred's stores and in comparison to sales of competing products in the custom-defined market where Fred's competes. For more information visit www.acnielsen.com.

Hispanic market report from Synovate Diversity

Miami-based research firm Synovate Diversity is now offering the 11th edition of the U.S. Hispanic Market Report. The new report, with over 340 pages of new primary research information on the Hispanic Consumer market of the U.S., includes expanded segmentation of Hispanic acculturation levels, updated buying power, language use, media and advertising info, demographic data, product/service use, in-depth Hispanic market profiles and for the first time, the top 80 multicultural markets around the country. For more information call Veronica Jijon at 305-649-5400 or visit www.synovate.com.

Harris Interactive debuts auto industry offerings

Harris Interactive, Rochester, N.Y., has introduced its enhanced, Internet-based market research capabilities for vehicle manufacturers and Tier 1-2-3 suppliers. Harris Interactive has developed the Automotive Insights Panel, a body of respondents identified from among its online panel of survey respondents. Harris Interactive's Automotive & Transportation Research capabilities include: migration of paper and phone-based research to online methodologies; customer satisfaction, retention and loyalty testing; virtual, online consumer clinics; interior and exterior product appearance testing; product feature/price testing; prototype/concept testing; and copy and advertising testing. For more information visit www.harrisinteractive.com.

Text-data analysis tool from SPSS

Chicago-based SPSS Inc. is now offering Predictive Text Analytics, a new solution focused on unlocking the insights trapped in widely collected, but rarely used, unstructured text data. Predictive Text Analytics is a text mining solution designed for analytical customer relationship management applications. Predictive Text Analytics integrates text mining technologies with predictive analytic approaches to enable organizations to unify and analyze both unstructured text data and structured data across all interaction channels, including call centers, branch locations and Web sites.

Today, in efforts to predict likely customer behaviors such as cross-sell potential and propensity to churn, many organizations apply predictive analytic techniques to their structured customer data assets, including demographic and behavioral information. However, this analysis does not involve unstructured customer feedback, such as call center notes, e-mail requests and open-ended survey responses, as this feedback data cannot be accurately summarized and integrated with traditional structured data.

Through incorporating specialized, automated text mining technologies, Predictive Text Analytics analyzes customer feedback to uncover and summarize key concepts such as overall satisfaction level, service frustration, price sensitivity, switching considerations and more. Once identified and extracted, these concepts are then integrated with the existing structured customer data. Then the entire data set can be evaluated using data mining to cluster, classify, segment, profile and predict the probability of this customer's next action. For more information visit www.spss.com.

Briefly...

Anaheim, Calif.-based Alvairi-Derfler Associates has released its research report exploring ways to gauge and measure advertising impressions in the face of TiVo and other DVRs, DVD players, VOD and other forms of nonlinear on-demand TV that challenge and threaten the existence of the 30-second spot TV advertising model. For more information visit www.ad-assoc.com/adv_metrics.htm.

Redlands, Calif.-based ESRI Business Information Solutions has announced Business Analyst Online, an updated and renamed version of its Web site. It combines geographic information system technology with business, demographic, and consumer household data to deliver Web capabilities previously available only through ESRI's Business Analyst desktop software. For more information visit www.esribis.com/business-analystonline.

Information Resources Inc., Chicago, has launched a new analytic service called Mix Drivers/Portfolio. Designed for CPG manufacturers who market multiple competing brands within the same product category, the service is designed to reveal opportunities to increase profits by reallocating marketing spending across entire brand portfolios. For more information visit www.infores.com.

G & S Research, Inc., Carmel, Ind., is now offering RepReview, a Internet-based study using the ePocrates panel of more than 4,500 health care sales representatives from pharmaceutical manufacturers to obtain their opinions on physicians, their employers and the competition. The study ascertains views of the industry's trends, practices and the overall selling environment. A free synopsis of the study is available at www.gs-research.com.

Research Industry News

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Perseus Midwest director of sales, will transfer from the headquarters offices to Michigan to manage the office.

Seattle-based **Global Market Insite** (GMI) has opened an Asia-Pacific regional office in Sydney, Australia. The office will be headed by Bob Chua.

Ted Kendall, who co-founded online qualitative software firm **QualTalk**, has left QualTalk to start a new venture. Operating under the umbrella of **Glow Teknologies**, a Greenwood Village, Colo., software company specializing in incentive compensation systems, Kendall has formed the Market Intelligence Services division to serve as a provider of market research services.

East Hanover, N.J., research firm **Market Measures/Cozint** has formed a new emerging markets team, focused on the market research needs of emerging pharmaceutical, medical device/diagnostics and biotech companies. The new team also will offer services to organizations with a specialized interest in the pharmaceutical and health care industries. The team will be led by Cindy Blodgett, executive vice president of Market Measures/Cozint.

Opinion Research Corporation, Princeton, N.J., has established the ORC Sports Research Desk and has hired Seth Levenstein, formerly president of Dynasty Sports Marketing, as director.

John Aitchison, previously an online research director at **TNS**, has opened **First Line Research**, an online market research firm based in York, England.

Names of Note

continued from page 10

TVG Marketing Research & Consulting, Fort Washington, Pa., has promoted **Eric John** and **Melinda Shorr** to associate vice president.

FGI Research, Chapel Hill, N.C., has named **Nicole Cicogna** vice president of sales.

Walker Information, Indianapolis, has announced several promotions: **Kim Veal** to accounting specialist; **Matthew Bane** to IT project coordinator; **Kerrie Castelo** to director of client service; and **Sarah Raines** to project director. Walker has also hired the following project directors: **Emily Stucky**, **Joe Horvath** and **Lauren Block**.

Richmond, Va.-based specialty chemical firm *Albemarle Corporation* has named **John M. Steitz** senior vice president. In this position, he is responsible for Albemarle's two global business units, sales and marketing, research and development, market research and the company's global regions.

Melissa Anderson has joined *MRSI* (Marketing Research Services Inc.), Cincinnati, as research analyst.

Opinion Research Corporation (ORC), Princeton, N.J., has named **Seth Levenstein** director of its new ORC Sports Research Desk.

Atlanta-based *Creative Research Services, Inc.* has named **Cynthia Avila** account executive, **Jennifer Lewis** project director, and **Pam Auclair** manager of field operations. In addition, **Lauren Irving** has been promoted to senior project director.

ICR/International Communications Research, Media, Pa., has named **James F. Fleckenstein** vice president, account services. He will head a new ICR office in New York City.

New York-based *Arbitron Inc.* has named **Ian Samuel** client service representative for Arbitron Advertiser/Agency Services.

Greenfield Online, Wilton, Conn., has named announces **Robert Mandl** director of panels.

R. Bruce Williamson has joined *U30 Group, Inc.*, a Knoxville, Tenn., research firm, as vice president of analytics and development.

San Francisco-based *Socratic Technologies* has named **Donna Wydra** vice president of its new Consumer Products Practice.

Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 952-854-5101. Fax 952-854-8191. Or visit www.quirks.com/media/moderator.asp.

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2004

Marketing Research

Software Directory >>>

The 2004 Directory of Marketing Research Software was compiled by sending listing forms to companies we identified as producers/vendors of marketing research-related software. This year's directory lists over 130 firms and over 330 software titles. The software firms are arranged alphabetically. Along with the company's vital information, we've also included the title(s) of the software they sell.

To make finding software easier, we have added cross-reference tables grouping the various software packages by capability (tabulation, integrated interviewing, CAPI/CASI, CATI, Web interviewing, paper/scan, and miscellaneous software). The tables show a list of each product's features and capabilities, allowing you to compare and contrast several products at a glance. Once you locate a package that interests you, simply refer to the company's listing in the alphabetical section for more information.

The company alphabetic section begins on page 72
The software cross-reference tables begin on page 90

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(See advertisement on p. 34)

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www.dvrinc.net
Ron Vangi, President
Software:
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WinPrin

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Database Sciences, Inc.
140 Rte. 17 North
Paramus, NJ 07652
Ph. 201-262-8500 ext. 12
Fax 201-262-8285
E-mail: info@databasesciences.com
www.databasesciences.com
Richard Raffel, Director Business Development
Software:
surveyNgine.com

Database Sciences develops and applies online surveying software for companies in a variety of industries. Our proprietary Web survey development engine is based on 18 years of experience in survey design. It enables us to deploy feature-rich, complex surveys without custom programming. We routinely post surveys on the Web with skip patterns, product/ad graphics, etc., within a few hours of receiving materials from clients. Our business model is simple: we are an e-field research facility that handles all aspects of online research efficiently, economically, and securely. Reporting options range from transmission of raw data to detailed analysis and presentation materials.
(See advertisement on Inside Back Cover)

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Ottawa, ON K1Z 8R1
Canada
Ph. 613-729-4480 or 888-921-8360
Fax 613-729-6711
E-mail: info@databeacon.com
www.databeacon.com
Software:
Databeacon

DATAN, Inc.
Skylands/Poconos Office
96 Angen Road
Washington, NJ 07882
Ph. 908-689-4060
Fax 908-689-4060
E-mail: merlin@datan.com
www.datan.com
Michael C. Stentz, Ph.D., President
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MERLIN Tabulation System
MERLINPlus (plus menus)
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DataUSA, Inc.
P.O. Box 91
Madison, CT 06443
Ph. 203-453-5555
Fax 203-453-8322
E-mail: tracy@datausainc.com
www.datausainc.com
Tracy Costin, Executive Director
Software:
E-Crosstabs

Dataxiom Software, Inc.
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Los Angeles, CA 90010
Ph. 213-383-9973
Fax 213-383-3542
E-mail: sales@dataxiom.com
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Software:
NCSS
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Power & Precision
SOLAS
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DBM Associates
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Whitehouse Station, NJ 08889
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Fax 908-534-1244
E-mail: bruce@dbma.com
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Decision Analyst, Inc.
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Arlington, TX 76011-3100
Ph. 817-640-6166 or 800-262-5974
Fax 817-640-6567
E-mail: jthomas@decisionanalyst.com
www.decisionanalyst.com
Jerry W. Thomas
Software:
STATS

STATS™ 2000 is a software package for IBM-compatible PCs. The software: generates random numbers; calculates sample sizes; computes the mean, standard deviation, standard error, range for keyboard-entered data; determines the standard error of proportion; performs significance tests between two percentages from independent samples, or dependent samples; does significance tests between averages from independent samples; performs Chi-square analysis.
(See advertisement on p. 11)

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Morristown, NJ 07960
Ph. 973-267-9269
Fax 973-285-9248
E-mail: hlevenbach@delphus.com
www.delphus.com
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Andrew Davidson, Marketing Director
Software:
Telescript 5.5

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David Huffman, Managing Director
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Community Coder

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Fax 44-20-8731-9591
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Fax 408-452-9701
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Future Information Research Management Inc.
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(See advertisement on p. 18)

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E-mail: sales@fleetwoodgroup.com
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Software:
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(See advertisement on p. 47)

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(See advertisement on p. 77)

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E-mail: sales@halogensoftware.com
www.halogensoftware.com
Software:
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eSurveyor 3.2 Open

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Fax 949-585-0050
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www.hostedware.com
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Information Tools Ltd.
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(See advertisement on p. 79)

Inquisite Web Surveys
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Ph. 512-225-6800 or 800-581-7354 (sales)
Fax 512-225-6690
E-mail: info@inquisite.com
www.inquisite.com
Software:
Inquisite Web Survey

Inquisite® allows you to easily create professional Web surveys and reports. We eliminate the high cost of outsourcing and put you in control of the survey process. Inquisite is ideal for the non-technical business manager who recognizes the value of ongoing feedback and needs the rapid implementation of Web surveys. With Inquisite, you can gather the strategic intelligence to make better decisions - quickly, easily, and more cost-effectively.
(See advertisement on p. 5)

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www.insightmarketing.com.au
Software:
Research Reporter

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Research for the Right Decision

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Stamford, CT 06902
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(See advertisement on p. 17)

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MapInfo Professional/MapX

Market Advantage Consulting & Software
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Fax 630-428-1947
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www.marketadvantageconsult.com
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PrefSolv
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Fax 44-1732-351135
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Fax 215-653-7115
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Dale W. Kulp, President
Software:

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PRO-T-S Telephony Systems: See PRO-T-S Telephony Systems listing.
Survey Database Management Systems: A Web-based storage/browser system for market research tabulations. Point-and-click to tables or spreadsheets for further analysis.
(See advertisement on pp. 47, 83)

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Fax 434-977-9615
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www.marketminer.com
Software:
MarketMiner

MDSS
Marketing Decision Support Systems, Inc.
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Ph. 800-870-MDSS or 317-594-3150
Fax 317-594-3155
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www.mdssworld.com
Kathy Pellman, Vice President
Software:
Research Tracker II

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United Kingdom
Ph. 44-20-7345-1322
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Tim Riley, Sr. V.P. Bus. Dev.
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i-measure

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White Plains, NY 10604
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Fax 914-428-8364
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www.mji-designlab.com
Software:
IdeaMap.Net

MSInteractive - Perception Analyzer
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Portland, OR 97204
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Fax 503-225-8400
E-mail: analyzer@perceptionanalyzer.com
www.perceptionanalyzer.com
David Paull, Sales Manager
Software:
Perception Analyzer

Multivariate Software, Inc.
15720 Ventura Blvd., Suite 306
Encino, CA 91436-2989
Ph. 818-906-0740 or 800-301-4456
Fax 818-906-8205
E-mail: sales@mvsoft.com
www.mvsoft.com
Software:
EQS Structural Equations Modeling

The NameStormers
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Lago Vista, TX 78645-7523
Ph. 512-267-1814 or 214-350-6214
Fax 512-267-9723
E-mail: mike@namestormers.com
www.namestormers.com
Michael L. Carr, Director
Software:
Headliner
NamePro

NCSS
329 N. 1000 E.
Kaysville, UT 84037
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Fax 801-546-3907
E-mail: sales@ncss.com
www.ncss.com
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Software:
NCSS

NEBU b.v.
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The Netherlands
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Fax 31-25-131-61-00
E-mail: info@nebu.com
www.nebu.com
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Dub Panel Man
Nebu Office Suite

NetRaker
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Fax 650-810-2255
E-mail: sales@netraker.com
www.netraker.com
George Papazian
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NetRaker Intelligence Platform

NetReflector, Inc.
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Ph. 877-823-5337 or 206-448-2690 ext. 139
Fax 206-448-2693
E-mail: info@netreflector.com
www.netreflector.com
Villette Nolon, President/CEO
Software:
InstantSurvey

NIPO Software
P.O. Box 247
Grote Bickersstraat 74
1000 AE Amsterdam
The Netherlands
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Fax 31-20-522-53-33
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Fax 724-693-9201
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Lynbrook, NY 11563
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Fax 516-247-5301
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Ira Sadowsky, Exec. Vice President
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PAI

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Ultimate Survey

Principia Products
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Fax 610-647-8771
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Sales Department
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(See advertisement on p. 83)

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Hopewell, NJ 08525-2809
Ph. 609-466-9200
Fax 609-466-1688
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Software:
P-STAT

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(See advertisement on p. 82)

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www.qpsmr.ltd.uk
Ros Biggs, Director
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Sammamish Data Systems, Inc.
P.O. Box 70382
Bellevue, WA 98005-0382
Ph. 425-867-1485 ext. 2
Fax 425-861-0184
E-mail: tj@sammdata.com
www.sammdata.com
Software:
GeoSight

SAS Institute
100 SAS Campus Dr.
Cary, NC 27513-2414
Ph. 919-677-8000 or 800-727-0025
Fax 919-677-4444
E-mail: software@sas.com
www.sas.com
Software:
SAS System

Sawtooth Software

Sawtooth Software, Inc.
530 W. Fir St.
Sequim, WA 98382-3209
Ph. 360-681-2300
Fax 360-681-2400
E-mail: info@sawtoothsoftware.com
www.sawtoothsoftware.com
Aaron Hill, Customer Support Consultant
Software:
- ACA System
- CBC System
- CCA System
- Ci3 System
- CPM System
- CVA System
- SSI Web

Sawtooth Software creates tools for computer/Web interviewing, conjoint, hierarchical Bayes (HB), perceptual mapping and cluster analysis. Ci3 and CiW are general interviewing packages for PC and the Web. We have three conjoint packages: ACA (Adaptive Conjoint Analysis), CBC (Choice-Based Conjoint), and CVA (Traditional Conjoint). Our HB modules are suitable for ACA, CBC or general regression problems.
(See advertisement on p. 85)

Sawtooth Technologies

Sawtooth Technologies, Inc.
1500 Skokie Blvd., Suite 510
Northbrook, IL 60062
Ph. 847-239-7300
Fax 847-239-7301
E-mail: info@sawtooth.com
www.sawtooth.com
Rob Sheppard, Director of Sales
Software:
- Sensus Web
- WinCati
- WinCATI Mixed Mode

WinCati and Sensus Web combine best practices with best value. Advanced questionnaire authoring, sample management, disposition monitoring, quota controls, real-time reporting, data exporting, and more. Rapid dialing, on-screen monitoring. AAPOR rules, and never call list standard. Predictive dialing, voice capture, and mixed mode options available. Same interviewing system for CATI, Web, and CATI/Web mixed mode. Fast setup, Windows interface, standard hardware.
(See advertisement on p. 86)

Scantron
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Irvine, CA 92618
Ph. 949-639-7777 or 800-722-6876
Fax 949-639-7710
E-mail: marketing.administrator@scantron.com
www.scantron.com
Software:
- eListen
- FLIPS
- TELEform

Senecio Software, Inc.
125 N. Main St.
Bowling Green, OH 43402
Ph. 419-352-4371
Fax 419-354-7512
E-mail: info@senecio.com
www.senecio.com
Jerry Wicks, President
Software:
- AskAnywhere
- Flo - Stat
- IPSS

SensoMotoric Instruments
97 Chapel Street
Needham, MA 02492
Ph. 781-453-1377
Fax 781-453-1378
E-mail: info@smiusa.com
www.smiusa.com
Software:
- 2D VOG
- 3D VOG
- iViewX

Smart Software, Inc.
Four Hill Rd., Suite 2
Belmont, MA 02478-4349
Ph. 617-489-2743
Fax 617-489-2748
E-mail: info@smartcorp.com
www.smartcorp.com
Software:
- Smart Forecasts

Snap Software
A Service of SQAD Inc.
303 S. Broadway, Suite 108
Tarrytown, NY 10591
Ph. 914-524-7600 ext. 29
Fax 914-524-7650
E-mail: info@snapsoftware.com
www.snapsoftware.com
Rob Taffner, Director, Bus. Dev.
Software:
- Snap Express
- Snap3
- Snapline
- Snaptrac

Snap Survey Software
Div. of Mercator Corporation
21 Pleasant St., Suite 201
Newburyport, MA 01950
Ph. 978-463-4093 or 800-997-7627
Fax 978-463-0515
E-mail: ssmith@mercatorcorp.com
www.snapsurveys.com
Software:
- Mercator SNAP Professional
- Mercator SNAP Results
- Mercator SNAP Scanning

Sparklit Networks
4110 Shelbourne St.
Victoria, BC V8N 3E7
Canada
Ph. 250-477-1336 or 877-275-5480
Fax 604-648-8332
E-mail: sales@sparklit.com
www.surveylogix.com
Software:
SurveyLogix

SurveyLogix is the premier tool for rapid hosted survey development. Create reports in real time with pie-charts, graphs, crosstabulation, conditional filtering. Employ branching, automated e-mail distribution, and respondent tracking. Fully brand able. Do it yourself or let our experienced technicians handle the layout and technical aspects.
(See advertisement on p. 87)

Spectra Marketing Systems, Inc.
200 W. Jackson Blvd., Suite 2800
Chicago, IL 60606
Ph. 312-583-5100
Fax 312-583-5101
E-mail: webmaster@spectramarketing.com
www.spectramarketing.com
Software:
Spectra Advantage
Spectra Enlighten
VRPS

Spring Systems
P.O. Box 7471
Westchester, IL 60154
Ph. 708-865-8523
E-mail: springsys@worldnet.att.net
www.geocities.com/wallstreet/3960/
John Pavasars, President
Software:
ARGUS Perceptual Mapper
MktSIM
Trial Map
Turbo Spring-Stat

SPSS MR USA
350 Fifth Ave.
New York, NY 10118
Ph. 646-536-8500
Fax 646-536-8599
E-mail: sales-us@spssmr.com
www.spssmr.com
Software:
Answer Tree
Clementine
Entryware
MR Interview
MR Paper
MR Scan/MR Paper
mr Studio
mr Tables
MR Translate
Quancept CATI
Quanquest
Quantum
Quanvert
SPSS
Verbastat

StatPac, Inc.
4425 Thomas Ave. S.
Minneapolis, MN 55410
Ph. 612-925-0159
Fax 612-925-0851
E-mail: info@statpac.com
www.statpac.com
David Walonick, President
Software:
Statistics Calculator
StatPac for Windows

StatPoint, LLC
P.O. Box 1124
Englewood Cliffs, NJ 07632-0124
Ph. 201-585-8581 or 800-232-STAT
Fax 201-585-8589
E-mail: info@statpoint.com
www.statpoint.com
Software:
STATBEANS
Statgraphics Plus
STATLETS

StatSoft, Inc.
2300 E. 14th St.
Tulsa, OK 74104
Ph. 918-749-1119
Fax 918-749-2217
E-mail: info@statsoft.com
www.statsoft.com
Alison Nichols
Software:
STATISTICA 6

William Steinberg Consultants, Inc.
P.O. Box 1754
Champlain, NY 12919
Ph. 888-725-9392
Fax 514-483-6660
E-mail: info@notjustsurveys.com
www.notjustsurveys.com
William Steinberg, Ph.D., President
Software:
Survey Genie
Survey Genie - Gold
Survey Tools For Windows

SumQuest Survey Software
398 Eglinton Ave. E., Unit PH11
Toronto, ON M4P 3H8
Canada
Ph. 800-779-7528
Fax 416-482-4480
E-mail: rmacnaughton@sumquest.com
www.sumquest.com
Ross Macnaughton
Software:
SumQuest

Survey Sampling International

Survey Sampling International
One Post Rd.
Fairfield, CT 06430
Ph. 203-255-4200
Fax 203-254-0372
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Christopher De Angelis, Sales Manager
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(See advertisement on p. 41)

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1711 Pearl St., Suite 300
Boulder, CO 80302
Ph. 303-449-2969
Fax 303-938-4015
E-mail: info@surveyconnect.com
www.surveyconnect.com
Software:
Survey Select Expert

SurveySite Inc.
49 Sheppard Ave. E.
Toronto, ON M2N 2Z8
Canada
Ph. 416-642-1002
Fax 416-642-1007
E-mail: sales@surveysite.com
www.surveysite.com
Software:
Pop-Up Survey Software

SurveyWriter®
4824 N. Hamilton
Chicago, IL 60625
Ph. 773-506-7006
Fax 773-506-1301
E-mail: info@surveywriter.com
www.surveywriter.com
Software:
SurveyWriter

SySurvey
13 Brenchley Gardens
London SE23 3RD
United Kingdom
Ph. 44-870-030-1773
E-mail: info@sysurvey.com
www.sysurvey.com
Ethan Roberts
Software:
Sysurvey.com

Tactician Corporation
305 N. Main St.
Andover, MA 01810
Ph. 800-927-7666
Fax 978-475-2136
E-mail: rreading@tactician.com
www.mapscape.com
Software:
MapScape.com

Techneos Systems Inc.
Suite 302, 788 Beatty St.
Vancouver, BC V6B 2M1
Canada
Ph. 604-435-6007 or 888-282-0641
Fax 604-435-6037
E-mail: info@techneos.com
www.techneos.com
Software:
Entryware

TelAthena Systems LLC
96 Morton St., ground floor
New York, NY 10014
Ph. 888-777-7565
Fax 212-206-1963
E-mail: sales@telathena.com
www.telathena.com
Software:
TelAthena

TeleSage, Inc.
3603 Woodland Park Ave. N.
Seattle, WA 98103-7905
Ph. 800-636-8524 or 206-545-4477
Fax 206-548-9575
E-mail: info@telesage.com
www.telesage.com
Software:
DialQuest
iQuest
ScanQuest
SendQuest
SmartQuest
TeleSage Software Suite

Tetrad Computer Applications, Inc.
3873 Airport Way
P.O. Box 9754
Bellingham, WA 98227-9754
Ph. 800-663-1334 or 360-734-3318
Fax 360-734-4005
E-mail: info@tetrad.com
www.tetrad.com
Wilson Baker, President
Software:
MapInfo
MapPoint
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Touch Base Computing
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Ph. 706-378-0964
E-mail: sales@touchbase.com
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Software:
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Touchpoll Survey Solutions
1722 Selig Lane
Los Altos, CA 94024
Ph. 650-968-0405
Fax 208-493-7449
E-mail: info@touchpollsurvey.com
www.touchpollsurvey.com
Software:
ViaTouch

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Redwood City, CA 94063-1402
Ph. 800-841-1177 or 650-365-1833
Fax 650-365-3737
E-mail: info@tragon.com
www.tragon.com
Joseph Salerno, Director
Software:
DDES 7.0
QDA Data Analysis Software

20/20 Research/QualTalk
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Nashville, TN 37212
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Fax 615-777-8706
E-mail: info@2020research.com
www.2020research.com
Software:
QualBoards

The Uncle Group, Inc.
3490 U.S. Rte. 1
Princeton, NJ 08540
Ph. 800-229-6287
Fax 609-452-8644
E-mail: info@unclegroup.com
www.unclegroup.com
Thomas Reeder, Vice President
Software:
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UNCLE Standard
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E-mail: sales@vikingsoft.com
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Software:
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VDE
VDE+Images

VOXCO
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Montreal, PQ H3B 1H4
Canada
Ph. 514-861-9255
Fax 514-861-9209
E-mail: montreal@voxco.com
www.voxco.com
Lucile Bousquet
Software:
CAPI Manager
Interviewer
Interviewer CAPI
Interviewer CATI
Interviewer VCC (Virtual Call Ctr.)
Interviewer Web
Pronto Telephony Solutions
STAT XP

WebSurveyor Corporation
505 Huntmar Park Dr., Suite 225
Herndon, VA 20170
Ph. 800-787-8755
Fax 703-783-0069
E-mail: sales@websurveyor.com
www.websurveyor.com
Software:
WebSurveyor 4.1

Weeks Computing Services
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United Kingdom
Ph. 44-20-7379-3548
Fax 44-20-7240-8870
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www.weekscomputing.com
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Software:
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U-Tab

Jan Werner Data Processing
34 Williams St.
Pittsfield, MA 01201
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E-mail: jwerner@jwdp.com
www.jwdp.com
Jan Werner, Principal
Software:
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QGEN
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Westat
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Rockville, MD 20850
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Fax 301-294-2040
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www.westat.com
Software:
Blaise
WesVar

WRC Research Systems, Inc.
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Downers Grove, IL 60515
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Ph. 406-556-0212
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www.xionetic.com
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Software:
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Xorbix Technologies, Inc.
759 N. Milwaukee St., Suite 322
Milwaukee, WI 53202
Ph. 866-ixopher (469-7437)
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www.ioxphere.com
Software:
Geoxphere
Ioxphere

Your Perceptions
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Denver, CO 80203
Ph. 303-534-3044
Fax 303-623-5426
E-mail: info@yourperceptions.com
www.yourperceptions.com
Jim Zigarelli, President
Software:
POV2000

Tabulation Software	Operating System					Tabulation Features							Significance Tests				Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Graphic user Interface or script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
Answer Tree SPSS MR USA, p. 86	●				●	Both	Var			●	●						Buy	
ARGUS Perceptual Mapper Spring Systems, p. 86	●										●						Buy	$
Askia Analyse ASKIA, p. 73	●					GUI	Unltd	Unltd	●	●	●		●		●			
CART Salford Systems, p. 84	●		●	●		Both	200,000		●	●	●						Buy	$$
CCA System Sawtooth Software, Inc., p. 85	●					GUI	300							●			Buy	$
Clementine SPSS MR USA, p. 86	●		●		●	Both	Unltd		●	●			●	●	●	●	Buy	
Confirmit FIRM INC., p. 76					●	GUI			●	●	●	●						
Conjoint Analysis InsightExpress, LLC, p. 78					●	Both	Unltd	Unltd	●	●	●	●		●	●			
COSI Computers for Marketing Corp. (CfMC), p. 74	●					GUI	Unltd	●	●	●		●		●				
Databeacon Databeacon Inc., p. 75					●	GUI												
Dub InterViewer NEBU b.v., p. 80					●	Both	Unltd	Unltd	●	●	●	●	●				Lease	
E-Crosstabs DataUSA, Inc., p. 75					●	GUI			●	●	●						Lease	
Eform Beach Tech Corporation, p. 74	●				●	Both	Unltd	Unltd	●	●	●	●		●	●	●	Either	
eListen Scantron, p. 85	●				●	GUI	Unltd	Unltd	●	●	●							
ESPRI Information Tools Ltd., p. 76	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Lease	$$
EQS Structural Equations Modeling Multivariate Software, Inc., p. 80	●		●	●		GUI			●	●	●		●	●	●	●	Either	$$
E-Tabs Interactive E-Tabs Ltd., p. 75	●	●			●	GUI			●	●	●	●				●	Lease	$$
E-Tabs Lite Reader E-Tabs Ltd., p. 75	●					GUI												
E-Tabs Web E-Tabs Ltd., p. 75	●		●									●					Lease	
E-Tabs Writer E-Tabs Ltd., p. 75	●		●			GUI												
FASTAB Ad Hoc Tabulation DATAN, Inc., p. 75	●					Syntax	5,000	Unltd	●	●	●						Lease	$
Flo - Stat Senecio Software, Inc., p. 85		●																
Forecast Pro Business Forecast Systems, p. 74	●					GUI	10	1	●		●						Buy	$
Forecast Pro Unlimited Business Forecast Systems, p. 74	●					Both	Unltd	Unltd	●	●	●		●		●		Buy	$$$$

$ = $0-$500 $$ = $501-$1500 $$$ = $1501-$2500 $$$$ = $2500+

Tabulation Software	Operating System					Tabulation Features							Significance Tests				Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Graphic user Interface or script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
Forecast Pro XEBusiness Forecast Systems, p. 74	●					GUI	100	1	●	●	●		●		●		Buy	$$$
GeoSight Sammamish Data Systems, Inc., p. 84	●					GUI	Unltd	Unltd	●	●	●						Buy	$
Geoxphere Xorbix Technologies, Inc., p. 89	●	●			●	GUI	Unltd	Unltd	●		●						Either	
HARMONI Information Tools Ltd., p. 76	●					GUI	Unltd	Unltd	●		●	●	●		●		Lease	$$$
Hosted Survey Hostedware, p. 76					●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	
ImagEntry Viking Software Solutions, p. 88	●		●	●		GUI	32,000	32,000									Buy	$$
i-measure Modern Survey, Inc., p. 80					●	GUI	Unltd	Unltd			●	●					Lease	$$$$
InsightExpress InsightExpress, LLC, p. 78					●	Both	Unltd	Unltd	●	●	●	●		●	●		Lease	
InsightPanels InsightExpress, LLC, p. 78					●	Both	Unltd	Unltd	●	●	●	●		●	●		Lease	
Internet Survey Machine Marketing Masters, p. 78	●	●	●	●	●		32,000	Unltd									Buy	$$$$
Interview & Analysis Program Comstat Research Corporation, p. 74																		
Ioxphere Xorbix Technologies, Inc., p. 89	●	●			●	GUI	Unltd	Unltd	●		●						Either	
MARS Salford Systems, p. 84	●		●	●			8,192		●	●	●						Buy	$$$$
MEDIASTAR Information Tools Ltd., p. 76	●					GUI	Unltd	Unltd					●		●		Lease	
MENTOR Computers for Marketing Corp. (CfMC), p. 74	●		●	●		Syntax	Unltd	Unltd	●	●	●		●		●			
Mercator SNAP Professional Snap Survey Software, p. 85	●					GUI			●	●	●		●		●		Buy	
Mercator SNAP Results Snap Survey Software, p. 85	●					Both	Unltd	Unltd	●	●	●		●		●			
Mercator SNAP Scanning Snap Survey Software, p. 85	●										●				●		Buy	
MERLIN Tabulation System DATAN, Inc., p. 75	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$$
MERLINPlus (plus menus) DATAN, Inc., p. 75	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$
Microtab XP 2004 - Professional Edition Microtab, Inc., p. 80	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$$
Microtab XP 2004 - Standard Edition Microtab, Inc., p. 80	●					GUI	Unltd	Unltd	●			●					Buy	$$
Microtab XP 2004 Ad-on Module Microtab, Inc., p. 80	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$
MktSIM Spring Systems, p. 86	●										●						Buy	$

$ = $0-$500 $$ = $501-$1500 $$$ = $1501-$2500 $$$$ = $2500+

Tabulation Software Software Title/ Company/Listing page#	Operating System: Win	Mac	Unix	Linux	Web	Tabulation Features: Graphic user Interface or script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Significance Tests: Chi-Square	F-Test	T-Test	Z-Test	Purchasing: Buy or Lease	Price Range
mr Studio SPSS MR USA, p. 86	●					Both			●	●		●					Either	
mr Tables SPSS MR USA, p. 86	●					GUI				●		●	●		●		Buy	$$$$
MRDCL Marketing & Rsch. Data Consultants, p. 78	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$$
mSITE PAI-Productive Access, Inc., p. 81					●	GUI											Lease	
mTAB Research Analysis System PAI-Productive Access, Inc., p. 81	●					GUI	Unltd	Unltd	●	●		●	●		●	●	Lease	
NCSS NCSS, p. 80	●					GUI	1,000	Unltd	●		●		●	●	●	●	Buy	$
NCSS Dataxiom Software, Inc., p. 75	●					GUI	250	Var	●	●	●		●	●	●	●		
NET-MR Tabulation Global Market Insite, Inc., p. 76	●		●	●	●	GUI	Unltd	Unltd	●	●	●		●	●	●			
NIPO DIANA NIPO Software, p. 81	●					Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Lease	$$$
OnTraq Marketing & Rsch. Data Consultants, p. 78	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$
PEER Forecaster Delphus, Inc., p. 75	●					GUI			●					●	●		Buy	$
PEER Planner for Windows Delphus, Inc., p. 75						GUI											Either	$$$$
P-STAT P-STAT, Inc., p. 82	●		●	●		Both	250,000	Unltd	●	●			●	●	●		Buy	$$
Pulsar Pulse Train Ltd., p. 82	●					GUI	Unltd	Unltd	●	●	●						Either	
QDA Data Analysis Software Tragon, p. 88	●					GUI	100				●			●			Buy	$$$$
QPSMR INSIGHT QPSMR Limited, p. 82	●					Both	30,000	30,000	●	●			●	●	●	●	Lease	$$
QPSMR REFLECT QPSMR Limited, p. 82	●					Both	30,000	30,000	●	●			●	●	●		Buy	$
QPSMR SOLO QPSMR Limited, p. 82	●					GUI	30,000	30,000	●				●	●	●		Buy	$$
QTAB Jan Werner Data Processing, p. 89	●			●		Syntax	Unltd	Unltd	●	●			●	●	●	●	Either	$$$
Quantum SPSS MR USA, p. 86							Unltd	Unltd	●	●			●		●	●	Buy	
Quanvert SPSS MR USA, p. 86	●					GUI		Var	●	●					●		Buy	
QuestionPro QuestionPro.com, p. 82					●	GUI	Unltd	Unltd	●			●	●		●		Either	$$
Quik-Poll Touch Base Computing, p. 87	●					GUI	300		●	●	●		●					
Raosoft EZReport Raosoft, Inc., p. 84	●					GUI	Unltd	Unltd	●	●	●		●	●	●		Buy	$

$ = $0-$500 $$ = $501-$1500 $$$ = $1501-$2500 $$$$ = $2500+

Tabulation Software	Operating System					Tabulation Features							Significance Tests				Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Graphic user Interface or script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
SatisfactionExpress InsightExpress, LLC, p. 78					●	Both	Unltd	Unltd	●	●	●	●		●	●		Lease	$$$$
Sensus Web Sawtooth Technologies, Inc., p. 85	●					Both	Unltd	Unltd	●			●					Buy	
SPSS SPSS MR USA, p. 86	●	●	●		●	Both	Unltd	Unltd	●	●	●		●	●	●	●	Buy	
Star Pulse Train Ltd., p. 82	●					Both	Unltd	Unltd	●	●					●	●	Either	
STAT XP VOXCO, p. 88	●					Both	10,000	Unltd	●	●	●	●	●		●	●	Buy	$$$$
STATBEANS StatPoint, LLC, p. 86	●	●	●	●		Syntax	Unltd	Unltd	●	●	●		●	●	●	●		
StatCheck Stat Checking Data Vision Research, Inc., p. 75															●		Buy	$
Statgraphics Plus StatPoint, LLC, p. 86	●					GUI	Unltd	Unltd	●	●	●		●	●	●	●		
STATISTICA 6 StatSoft, Inc., p. 86	●				●	Both	Var	Var	●	●	●		●	●	●	●	Buy	
STATLETS StatPoint, LLC, p. 86					●	GUI	Unltd	Unltd	●	●	●		●	●	●	●		
StatMost Dataxiom Software, Inc., p. 75	●					GUI	250	Var	●		●		●	●	●	●		
StatPac for Windows StatPac, Inc., p. 86	●					Syntax	1,000	Unltd	●	●	●		●	●	●	●	Buy	$$
STATS Decision Analyst, Inc., p. 75	●					GUI				●			●					
SumQuest SumQuest Survey Software, p. 87	●					GUI	250	Unltd	●	●	●	●	●				Buy	$
SuperCROSS Alta Plana Corporation, p. 72	●					GUI	Unltd	Unltd	●	●	●	●	●				Either	$$$$
SuperSTAR Alta Plana Corporation, p. 72	●		●	●		Both	Unltd	Unltd	●	●	●	●					Either	$$$$
Survey Explorer Memphis International, p. 78	●					GUI	Unltd	Unltd	●	●			●					
Survey Said for the Web Marketing Masters, p. 78	●																	
Survey Said for Windows Marketing Masters, p. 78	●																	
Survey Select Expert SurveyConnect, Inc., p. 87	●					GUI	Unltd	Unltd			●	●					Buy	$$
Survey Stats Drago Consulting Inc., p. 75																		
Survey Viewer Memphis International, p. 78	●					GUI	Unltd		●	●	●		●					
SurveyPro Apian Software, p. 73	●					GUI	3,000	3,000	●	●	●	●	●				Buy	$$
SurveySolutions Perseus Development Corporation, p. 81	●					GUI	Unltd	Unltd	●		●							

$ = $0-$500 $$ = $501-$1500 $$$ = $1501-$2500 $$$$ = $2500+

Tabulation Software	Operating System					Tabulation Features							Significance Tests				Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Graphic user Interface or script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
Sysurvey.com SySurvey, p. 87					●	GUI			●		●	●					Lease	
The Designer CAMO, p. 74	●					GUI	Unltd	Unltd	●	●	●			●	●	●		
The Survey Cybernetic Solutions - The Survey Software, p. 74	●					GUI	1,000	32,000	●	●	●		●	●	●	●	Buy	$
The Survey System Creative Research Systems, p. 74	●					GUI	32,000	5,000	●	●			●	●	●	●	Buy	$
The Unscrambler CAMO, p. 74	●					GUI	Unltd	Unltd	●	●	●			●	●	●		
TPL Tables QQQ Software, Inc., p. 82	●		●			Both	Unltd	Unltd	●	●		●					Buy	$$
TreeNet Salford Systems, p. 84	●		●	●		Both	200,000		●	●	●						Buy	$$$$
Trial Map Spring Systems, p. 86	●										●						Buy	$
Turbo Spring-Stat Spring Systems, p. 86	●										●		●	●	●	●	Buy	$
UNCLE Professional The Uncle Group, Inc., p. 88	●					Both	65,534	9999	●	●	●		●		●		Buy	$$$$
UNCLE Standard The Uncle Group, Inc., p. 88	●					Both			●	●	●		●		●		Buy	$$$$
U-Tab Weeks Computing Services, p. 89	●					GUI	Unltd	Unltd	●	●	●	●			●		Buy	$
VDE Viking Software Solutions, p. 88	●		●	●		GUI	32,000	32,000									Either	$$
VDE+Images Viking Software Solutions, p. 88	●		●	●		GUI	32,000	32,000									Buy	$$
Vector ATP Limited, p. 73					●	GUI	Unltd	Unltd	●	●	●	●				●	Lease	$$$$
WesVar Westat, p. 89	●					GUI	Unltd	Unltd		●			●	●	●	●	Buy	$
WinCati Sawtooth Technologies, Inc., p. 85	●					Both	Unltd	Unltd	●			●					Buy	
WinCross The Analytical Group, Inc., p. 72	●					Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$$
XPro Dataxiom Software, Inc., p. 75	●					GUI	250	Var	●	●	●		●	●	●	●		

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Integrated Interviewing Software	Operating System					Design Tool	Types of Data Collection								Features			Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Graphic user Interface or script	CAPI	CASI	CATI	Web	E-Mail	Paper	Scanning	Keyed Entry	Tabulation	Statistics	Visual Tools	Buy or Lease	Price Range
AskAnywhere Senecio Software, Inc., p. 85	●	●	●	●	●	GUI	●	●		●	●				●			Lease	$$
Askia ASKIA, p. 73	●						●	●	●	●				●	●	●	●		
Ci3 System Sawtooth Software, Inc., p. 85	●					Both	●	●							●	●		Buy	$
Confirmit FIRM INC., p. 76					●	GUI	●	●	●	●		●		●	●	●	●		
Dub InterViewer NEBU b.v., p. 80					●	GUI	●	●	●	●					●	●		Lease	
Eform Beach Tech Corporation, p. 74	●				●	Both			●	●	●		●	●	●	●	●	Either	
Hosted Survey Hostedware, p. 76					●	Both	●			●	●	●		●	●	●	●	Either	
Interviewer VOXCO, p. 88	●				●	Both	●	●	●	●				●	●	●		Either	
IT CATI/CAPI/Web Interview Technology, p. 78							●		●	●					●				
Mercator SNAP Professional Snap Survey Software, p. 85	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	
MR Interview SPSS MR USA, p. 86	●					Both	●	●		●				●		●		Either	$$$$
ET-MR Suite Global Market Insite, Inc., p. 76	●		●	●	●	GUI	●	●	●	●		●		●	●	●	●		
NIPO Interview System NIPO Software, p. 81	●					Both	●	●	●	●	●				●	●	●	Lease	$$
QPSMR CATI QPSMR Limited, p. 82	●					Both	●	●	●		●	●		●	●	●			
Quanquest SPSS MR USA, p. 86	●					GUI	●		●	●		●	●	●				Buy	
Raosoft SurveyWin Raosoft, Inc., p. 84	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$
Results for Research 6.0 RONIN Corporation, p. 84	●				●	Both	●	●	●	●								Buy	
SSI Web Sawtooth Software, Inc., p. 85	●				●	Both	●	●		●					●	●		Buy	$$$$
StatPac for Windows StatPac, Inc., p. 86	●					Syntax			●	●	●	●		●	●	●	●	Buy	$$
SumQuest SumQuest Survey Software, p. 87	●					GUI			●	●	●	●		●	●	●	●	Buy	$
The Survey Cybernetic Solutions, p. 74	●					GUI				●	●	●		●	●	●	●	Buy	$
Survey Genie William Steinberg Consultants, Inc., p. 86	●					GUI				●	●	●		●	●	●	●	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 86	●					GUI		●		●	●	●		●	●	●	●	Buy	$
Survey Said for the Web Marketing Masters, p. 78	●	●	●	●		GUI			●	●	●	●	●	●	●			Buy	$$
Survey Said for Windows Marketing Masters, p. 78	●					GUI			●	●	●	●	●	●				Buy	
The Survey System Creative Research Systems, p. 74	●					GUI	●	●	●	●	●	●	●	●				Buy	$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 86	●					GUI		●		●	●	●		●	●	●	●	Buy	$
SurveyPro Apian Software, p. 73	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$$
SurveySolutions Perseus Development Corporation, p. 81	●					GUI				●	●	●		●	●	●	●		
TeleSage Software Suite TeleSage, Inc., p. 87	●					GUI	●	●		●			●		●		●	Buy	$$$
WinCATI Mixed Mode Sawtooth Technologies, Inc., p. 85	●					Both			●	●					●	●		Buy	

$ = $0-$500 $$ = $501-$1500 $$$ = $1501-$2500 $$$$ = $2500+

CAPI/CASI Software	Operating System					Platform				Design Tool	CAPI/CASI Features				Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Desktop	Handheld	Touchscreen	IVR	Graphic user Interface or script	Audio	Still Images	Video	Tabulation Analysis Tools	Buy or Lease	Price Range
Abase Advanced Data Research, Inc., p. 72	●					●	●	●		Both	●	●	●	Yes	Buy	$$$$
ACA System Sawtooth Software, Inc., p. 85	●					●				GUI	●	●	●	Yes	Buy	$$$
ARCS IVR/Web DBM Associates, p. 75	●				●				●	GUI	●			No	Either	$$$$
AskAnywhere Senecio Software, Inc., p. 85	●	●	●	●	●	●	●	●		GUI	●	●	●	Yes	Lease	$$
Askia Face ASKIA, p. 73	●					●				Both	●	●	●			
Bellview CAPI Pulse Train Ltd., p. 82	●					●				Both	●	●	●	Add-on	Either	
Blaise Westat, p. 89																
CBC System Sawtooth Software, Inc., p. 85	●					●				GUI	●	●	●	Yes	Buy	$$$$
Ci3 System Sawtooth Software, Inc., p. 85					●	●				Both	●	●	●	Yes	Buy	$
CONVERSO CAPI CONVERSOFT (Axiom Software), p. 74																
CONVERSO CASI CONVERSOFT (Axiom Software), p. 74																
CONVERSO Pocket CONVERSOFT (Axiom Software), p. 74																
CVA System Sawtooth Software, Inc., p. 85	●					●				GUI	●	●	●	Yes	Buy	$$
DialQuest TeleSage, Inc., p. 87	●								●	GUI	●			Add-on	Buy	$$$
Dub InterViewer NEBU b.v., p. 80					●	●	●	●		GUI	●	●	●	Add-on	Lease	
Eform Beach Tech Corporation, p. 74	●				●	●			●	Both	●	●		Yes	Either	
Entryware Techneos Systems Inc., p. 87	●						●			Both				No	Either	
Entryware SPSS MR USA, p. 86							●			GUI				Add-on	Buy	
eSurveyor 3.1 Domino Halogen Software Inc., p. 76	●	●			●	●				GUI		●		Yes	Lease	$$$$
eSurveyor 3.2 Open Halogen Software Inc., p. 76	●	●			●	●				GUI		●		Yes	Lease	$$$$
Hosted Survey Hostedware, p. 76					●		●	●		Both	●	●	●	Add-on	Either	
IdeaMap.Net Moskowitz Jacobs Inc., p. 80					●	●				GUI	●	●	●	Yes	Lease	$$$
Inet-On-Line Research.Net, Inc., p. 84															Either	
Interview & Analysis Program Comstat Research Corporation, p. 74																

$ = $0-$500 $$ = $501-$1500 $$$ = $1501-$2500 $$$$ = $2500+

CAPI/CASI Software	Operating System					Platform				Design Tool	CAPI/CASI Features				Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Desktop	Handheld	Touchscreen	IVR	Graphic user Interface or script	Audio	Still Images	Video	Tabulation Analysis Tools	Buy or Lease	Price Range
Interviewer CAPI VOXCO, p. 88	●				●	●	●	●		Both	●	●	●	Yes	Either	$$
IT CATI/CAPI/Web Interview Technology, p. 78																
Mercator SNAP Professional Snap Survey Software, p. 85	●					●				GUI		●		Yes	Buy	
Mobile Memoir Mobile Memoir, LLC, p. 80					●		●			Both				Yes	Either	
NET-CAPI Global Market Insite, Inc., p. 76	●		●	●	●	●	●			GUI	●	●	●	Yes		
NIPO CAPI System NIPO Software, p. 81	●					●	●	●		Both	●	●	●	Add-on	Lease	$$$$
QPSMR INSIGHT QPSMR Limited, p. 82	●					●				Both				Yes		
Raosoft EZSurvey Raosoft, Inc., p. 84					●	●	●			GUI	●	●	●	Yes	Buy	$
Raosoft InterForm Raosoft, Inc., p. 84					●	●				GUI	●	●	●	Yes	Buy	$$$$
Raosoft SurveyWin Raosoft, Inc., p. 84	●					●		●		GUI		●		Add-on	Buy	$
Reform Anyware Mobile Solutions, p. 72					●		●		●	GUI	●	●		Yes		
Reply Fleetwood Group, Inc., p. 76	●	●				●				GUI	●	●	●	No		
Results for Research 6.0 RONIN Corporation, p. 84	●				●	●	●	●		Both	●	●	●	Yes	Buy	
SmartQuest TeleSage, Inc., p. 87	●								●	GUI	●			Add-on	Buy	$$$
SSI Web Sawtooth Software, Inc., p. 85	●				●	●				Both	●	●	●	Yes	Buy	$$$$
SURVENT Computers for Marketing Corp. (CfMC), p. 74	●					●				Syntax				Yes		
Survey Genie William Steinberg Consultants, Inc., p. 86	●					●				GUI				Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 86	●					●				GUI				Yes	Buy	$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 86	●					●				GUI				Yes	Buy	$
SurveyPro Apian Software, p. 73	●					●				GUI		●		Yes	Buy	$$
The Survey System Creative Research Systems, p. 74	●					●		●		GUI	●	●	●	Yes	Buy	$
The Survey System - CATI Creative Research Systems, p. 74	●					●				GUI	●		●	Yes	Buy	$$$
ViaTouch Touchpoll Survey Solutions, p. 88	●						●	●								
WinQuery The Analytical Group, Inc., p. 72	●					●				Both	●	●	●	Yes	Buy	$$$

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CATI Software	Operating System				Design Tool	CATI Features			Purchasing	
Software Title/ Company/Listing page#	Win	Unix	Linux	Web	Graphic user Interface or script	Central Management	Predictive Dialing	Tabulation Analysis Tools	Buy or Lease	Price Range
Askia Voice ASKIA, p. 73	●				Both	●	●	Yes		
Bellview CATI Pulse Train Ltd., p. 82	●				Both	●	●	Add-on	Either	
Confirmit FIRM INC., p. 76	●			●	GUI	●		Yes		
CONVERSO CATI CONVERSOFT (Axiom Software), p. 74										
Dub InterViewer NEBU b.v., p. 80			●	●	GUI	●	●	Yes	Lease	
Eform Beach Tech Corporation, p. 74	●			●	Both			Yes	Either	
Interview & Analysis Program Comstat Research Corporation, p. 74										
Interviewer CATI VOXCO, p. 88	●			●	Both	●	●	Yes	Either	$$
Interviewer VCC (Virtual Call Ctr.) VOXCO, p. 88	●			●	Both	●	●	Yes	Buy	$$
Ioxphere Xorbix Technologies, Inc., p. 89	●			●	GUI			Yes	Either	
IT CATI/CAPI/Web Interview Technology, p. 78										
Itracks Online CATI Itracks, p. 78				●	Both				Lease	
Mercator SNAP Professional Snap Survey Software, p. 85	●				GUI			Yes	Buy	
NET-CATI Global Market Insite, Inc., p. 76	●	●	●	●	GUI	●	●	Yes		
NIPO CATI System NIPO Software, p. 81	●				Both	●	●	Add-on	Lease	$$$$
QPSMR CATI QPSMR Limited, p. 82	●				Both	●	●	Yes	Lease	$$$$
Quancept CATI SPSS MR USA, p. 86		●			GUI	●	●		Either	
Raosoft EZSurvey Raosoft, Inc., p. 84				●	GUI	●		Add-on	Buy	$
Raosoft InterForm Raosoft, Inc., p. 84				●	GUI	●		Add-on	Buy	$$$$
Raosoft SurveyWin Raosoft, Inc., p. 84	●				GUI	●		Add-on	Buy	$
Results for Research 6.0 RONIN Corporation, p. 84	●			●	Both	●	●	Yes	Buy	
StatPac for Windows StatPac, Inc., p. 86	●				Both			Yes	Buy	$$
SumQuest SumQuest Survey Software, p. 87	●				GUI				Buy	$
SURVENT Computers for Marketing Corp. (CfMC), p. 74	●	●	●	●	Syntax	●	●	Yes		
The Survey Cybernetic Solutions, p. 74	●				GUI	●		Yes	Buy	$
Survey Said for the Web Marketing Masters, p. 78	●									
Survey Said for Windows Marketing Masters, p. 78	●									
SurveyPro Apian Software, p. 73	●				GUI			Yes	Buy	$$
Sysurvey.com SySurvey, p. 87				●	GUI			Yes	Lease	
TelAthena TelAthena Systems LLC, p. 87										
Telescript 5.5 Digisoft Computers, Inc., p. 75	●			●	GUI		●	Add-on	Buy	$$
The Survey System - CATI Creative Research Systems, p. 74	●				GUI	●		Yes	Buy	$$$
WinCati Sawtooth Technologies, Inc., p. 85	●				Both	●	●	No	Buy	
WinQuery The Analytical Group, Inc., p. 72	●				Both	●	●	Yes	Buy	$$$

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Paper-Based/Scan Survey Software	Operating System		Design Tool	Scan Types					Features	Purchasing	
Software Title/ Company/Listing page#	Win	Web	Graphic user Interface or script	OCR	OMR	Bar Code	Pre Printed	Hand Written	Tabulation & Analysis Tools	Buy or Lease	Price Range
Bellview Scan Pulse Train Ltd., p. 82	●		GUI	●	●	●	●	●	Add-on	Either	
Confirmit FIRM INC., p. 76		●	GUI						Yes		
DDES 7.0 Tragon, p. 88	●		GUI						Add-on	Buy	$$
Eform Beach Tech Corporation, p. 74	●	●	Both		●	●			Yes	Either	
ExpertScan AutoData Systems, p. 74	●		GUI		●	●	●	●	Yes	Buy	$$$
FAQSS Optimum Solutions Corp., p. 81	●		GUI	●	●	●	●	●	Yes	Lease	$$$$
FLIPS Scantron, p. 85	●			●	●	●					
Inquisite Web Survey Inquisite Web Surveys, p. 76	●	●	GUI		●				Yes	Either	
Mercator SNAP Scanning Snap Survey Software, p. 85			GUI	●				●	Yes	Buy	
MR Paper SPSS MR USA, p. 86	●		Both	●	●	●	●	●			
MR Scan/MR Paper SPSS MR USA, p. 86	●		GUI	●	●	●	●	●	Add-on	Either	
Net-Paper Global Market Insite, Inc., p. 76											
Remark Classic OMR Principia Products, p. 81	●		GUI		●	●	●		Yes	Buy	$$
Remark Office OMR Principia Products, p. 81	●		GUI		●	●			Yes	Buy	$$
Scannable Office AutoData Systems, p. 74	●		GUI	●	●	●	●	●	No	Buy	$$$$
ScanQuest TeleSage, Inc., p. 87	●		GUI		●				Add-on	Buy	$$
SumQuest SumQuest Survey Software, p. 87	●		GUI						Yes	Buy	$
Survey Genie William Steinberg Consultants, Inc., p. 86	●		GUI						Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 86	●		GUI						Yes	Buy	$
Survey Plus 2000 AutoData Systems, p. 74	●		GUI		●	●		●	Yes	Buy	$$$
Survey Said for the Web Marketing Masters, p. 78	●		GUI	●					Yes	Buy	$$$
Survey Said for Windows Marketing Masters, p. 78	●		GUI	●	●				Yes	Buy	
Survey Select Expert SurveyConnect, Inc., p. 87	●		GUI						Yes	Buy	$$
The Survey System Creative Research Systems, p. 74			GUI		●				Yes	Buy	$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 86	●		GUI						Yes	Buy	$
SurveyPro Apian Software, p. 73	●		GUI	●	●	●			Yes	Buy	$$
SurveySolutions Perseus Development Corporation, p. 81	●		GUI						Yes		
TELEform Scantron, p. 85	●			●			●	●			

$ = $0-$500 $$ = $501-$1500 $$$ = $1501-$2500 $$$$ = $2500+

Web Interviewing Software Solutions	Operating System					Design Tool	Web Interviewing Features					Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Graphic user Interface or script	Data Collection (Web or E-mail)	Web Security	Quota Control	Tabulation & Analysis Tools	Real-Time Reports	Buy or Lease	Price Range
ARCS IVR/Web DBM Associates, p. 75	●				●	GUI		●	●	No		Either	$$$$
AskAnywhere Senecio Software, Inc., p. 85	●	●	●	●	●	GUI	Both	●		Yes	●	Lease	$$
Askia Web ASKIA, p. 73	●					GUI		●	●	Yes			
Bellview Web Pulse Train Ltd., p. 82	●					Both	Web	●	●	Add-on		Either	
Blaise Westat, p. 89													
Confirmit FIRM INC., p. 76					●	Both	Both	●	●	Yes	●		
CONVERSO CAWI CONVERSOFT (Axiom Software), p. 74													
Dub InterViewer NEBU b.v., p. 80	●			●		GUI	Web	●	●	Add-on		Lease	
Eform Beach Tech Corporation, p. 74	●				●	Both		●	●	Yes			
eSurveyor 3.1 Domino Halogen Software Inc., p. 76	●					GUI	Web	●		Yes	●	Lease	$$$$
eSurveyor 3.2 Open Halogen Software Inc., p. 76	●	●				GUI	Web	●		Yes	●	Lease	$$$$
FlexiQuest Weeks Computing Services, p. 89					●	Both	Web	●	●	Add-on	●		
Hosted Survey Hostedware, p. 76					●	Both	Both	●	●	Add-on	●	Either	
IdeaMap.Net Moskowitz Jacobs Inc., p. 80					●	GUI	Web	●	●	Yes		Lease	$$$$
Inet-On-Line Research.Net, Inc., p. 84												Either	
Inquisite Web Survey Inquisite Web Surveys, p. 76	●				●	GUI	Web	●	●	Yes	●	Either	$$$$
InsightExpress InsightExpress, LLC, p. 78					●	Both	Both	●	●	Yes	●	Lease	
InsightPanels InsightExpress, LLC, p. 78					●	Both	Both	●	●	Yes	●	Buy	
InstantSurvey NetReflector, Inc., p. 80					●	Both	Web	●	●	Yes	●	Buy	$
Internet Survey Machine Marketing Masters, p. 78					●	GUI	Web	●		Yes	●	Buy	$$$$
Interview & Analysis Program Comstat Research Corporation, p. 74													
Interviewer Web VOXCO, p. 88	●					Both	Web	●	●	Yes	●	Either	$$
Ioxphere Xorbix Technologies, Inc., p. 89	●	●			●	GUI	Both	●	●	Yes		Either	
iQuest TeleSage, Inc., p. 87	●					GUI	Both	●	●	Add-on	●	Buy	$$$$
IT CATI/CAPI/Web Interview Technology, p. 78													
Itracks Online Surveys Itracks, p. 78					●	Both	Web	●	●	Yes	●	Lease	
Mercator SNAP Professional Snap Survey Software, p. 85	●					GUI	Both			Yes		Buy	
Mobile Memoir Mobile Memoir, LLC, p. 80					●	Both	Web		●	Yes	●	Either	
MR Interview SPSS MR USA, p. 86	●					Both	Both	●	●	Yes		Either	$$$$
mr Studio SPSS MR USA, p. 86	●					Both				Add-on		Either	
NetRaker Intelligence Platform NetRaker, p. 80					●	Both	Both		●	Yes			
NET-Survey Global Market Insite, Inc., p. 76	●		●	●	●	GUI	Web	●	●	Yes	●	Either	
NIPO Web Interview System NIPO Software, p. 81	●					Both	Both	●	●	Yes	●	Lease	$$

$ = $0-$500 $$ = $501-$1500 $$$ = $1501-$2500 $$$$ = $2500+

Web Interviewing Software Solutions	Operating System					Design Tool	Web Interviewing Features					Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Graphic user Interface or script	Data Collection (Web or E-mail)	Web Security	Quota Control	Tabulation & Analysis Tools	Real-Time Reports	Buy or Lease	Price Range
Opinio ObjectPlanet AS, p. 81	●	●	●	●	●		Both	●		Yes	●	Either	$
Pop-Up Survey Software SurveySite Inc., p. 87													
PowerTab Power Knowledge Software, LLC, p. 81		●				GUI	Web	●		Yes		Buy	$
QueryWeb The Analytical Group, Inc., p. 72	●					Both	Web	●	●	Yes	●	Buy	$$$$
QuestionPro QuestionPro.com, p. 82					●	GUI	Web	●	●	Yes	●	Either	$$
Raosoft EZSurvey Raosoft, Inc., p. 84					●	GUI	Both	●		Add-on		Buy	$
Raosoft InterForm Raosoft, Inc., p. 84					●	GUI		●		Add-on		Buy	$$$$
Remark Web Survey Professional Principia Products, p. 81	●					Both	Both	●				Buy	$$
Remark Web Survey Standard Principia Products, p. 81	●					Both	Both	●		Yes		Buy	$
Results for Research 6.0 RONIN Corporation, p. 84					●	Both	Web	●	●	Yes	●	Buy	
Rogator 6.3 Rogator AG, p. 84	●				●	GUI		●	●	Yes			
SatisfactionExpress InsightExpress, LLC, p. 78					●	Both	Both	●	●	Yes	●	Lease	$$$$
Sensus Web Sawtooth Technologies, Inc., p. 85	●					Both	Web	●	●	Yes		Buy	
SSI Web Sawtooth Software, Inc., p. 85	●					GUI	Both	●	●	Yes		Buy	$$$$
StatPac for Windows StatPac, Inc., p. 86	●					Syntax	Both	●		Add-on		Buy	$$
SumQuest SumQuest Survey Software, p. 87	●					GUI	Both			Yes		Buy	$
Survey Console QuestionPro.com, p. 82					●	GUI	Both	●	●	Yes	●	Lease	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 86	●					GUI	Both			Yes		Buy	$
Survey Said for the Web Marketing Masters, p. 78	●					GUI	Both			Yes		Buy	$$
Survey Said for Windows Marketing Masters, p. 78	●					GUI	Both			Yes		Buy	
Survey Select Expert SurveyConnect, Inc., p. 87	●					GUI	Both	●		Yes		Buy	$$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 86	●					GUI	Both			Yes		Buy	$
SurveyLogix Sparklit Networks, p. 86						GUI	Both	●	●	Yes	●	Lease	$
surveyNgine.com Database Sciences, Inc., p. 75					●					Yes			
SurveyPro Apian Software, p. 73	●					GUI	Both	●		Yes		Buy	$$
SurveySolutions Perseus Development Corporation, p. 81	●					GUI	Both	●	●	Yes			
SurveyWriter SurveyWriterÆ, p. 87													
Sysurvey.com SySurvey, p. 87					●	GUI	Both	●	●	Yes	●	Lease	
The Survey Cybernetic Solutions, p. 74	●					GUI	Both	●		Yes		Buy	$
The Survey System - Web Creative Research Systems, p. 74	●					GUI	Both	●	●	Yes	●	Buy	$$
Ultimate Survey Prezza Technologies, Inc., p. 81	●					GUI	Both	●	●	Add-on	●	Buy	$$
WebSURVENT Computers for Mktg. Corp. (CfMC), p. 74	●		●	●	●	Syntax		●	●	Add-on			
WebSurveyor 4.1 WebSurveyor Corporation, p. 88	●					GUI	Web	●		Yes		Buy	$$

$ = $0-$500 $$ = $501-$1500 $$$ = $1501-$2500 $$$$ = $2500+

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2D VOG SensoMotoric Instruments, p. 85	●																
3D VOG SensoMotoric Instruments, p. 85	●																
ARGUS Perceptual Mapper Spring Systems, p. 86					●	●											
Arthur The Analytical Group, Inc., p. 72			●														
ASDE Survey Sampler - Canada ASDE Survey Sampler, p. 73															●		
ASDE Survey Sampler - USA ASDE Survey Sampler, p. 73															●		
BrandMap WRC Research Systems, Inc., p. 89					●												
BrandProfiler WRC Research Systems, Inc., p. 89					●												
BrandTrend WRC Research Systems, Inc., p. 89				●													
Bulletin Board Focus Groups Itracks, p. 78											●						
CAPI Manager VOXCO, p. 88								●									
CART Salford Systems, p. 84					●												
Community Coder ESRI Business Information Solutions, p. 75		●					●										
ConsumerPoint Claritas Inc., p. 74						●	●										
DataFit Oakdale Engineering, p. 81					●												
DecisionPad Apian Software, p. 73						●											
DialQuest TeleSage, Inc., p. 87														●			
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DynaMap/Census Geographic Data Technology, Inc., p. 76							●										
East 3.0 Cytel Software, p. 74						●											
E-Scrub PDPC, Ltd., p. 81		●															
ESPRI Information Tools Ltd., p. 76					●	●											
E-Tabs Interactive E-Tabs Ltd., p. 75				●	●												

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E-Tabs Lite Reader E-Tabs Ltd., p. 75				●		●											
E-Tabs Professional Reader E-Tabs Ltd., p. 75				●													
E-Tabs Web E-Tabs Ltd., p. 75				●		●											
E-Tabs Writer E-Tabs Ltd., p. 75				●		●											
Forecast Pro Business Forecast Systems, p. 74																	
Forecast Pro Unlimited Business Forecast Systems, p. 74																	
Forecast Pro XE Business Forecast Systems, p. 74																	
Fuzzy Mail Merge PDPC, Ltd., p. 81		●															
GENESYS Sampling Systems GENESYS Sampling Systems, p. 76															●		
GENESYS-Plus GENESYS Sampling Systems, p. 76													●				
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Headliner The NameStormers, p. 80										●							
iMARK Claritas Inc., p. 74							●										
iMARK Online Claritas Inc., p. 74							●										
i-measure Modern Survey, Inc., p. 80						●					●						
InsightPanels InsightExpress, LLC, p. 78								●							●		
Ioxphere Xorbix Technologies, Inc., p. 89	●																●
IPSS Senecio Software, Inc., p. 85							●										
iViewX SensoMotoric Instruments, p. 85	●																
iXPRESS Claritas Inc., p. 74							●										
LogXact Cytel Software, p. 74						●											
MapInfo Tetrad Computer Applications, Inc., p. 87							●										
MapInfo Professional/MapX MapInfo Corporation, p. 78							●										

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MapScape.com Tactician Corporation, p. 87							●										
Maptitude Caliper Corporation, p. 74							●										
Maptitude for Redistricting Caliper Corporation, p. 74							●										
Maptitude for the Web Caliper Corporation, p. 74																	●
MarketMiner MarketMiner, Inc., p. 78						●											
MARS Salford Systems, p. 84						●											
MEDIASTAR Information Tools Ltd., p. 76	●																
Microtab XP 2004 - Professional Edition Microtab, Inc., p. 80		●															
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MiningSolv Market Advantage Consulting & Software, p. 78					●												
Mirage Enterprise Finjan Software, p. 76												●					
MktSIM Spring Systems, p. 86						●											
M-Link The Analytical Group, Inc., p. 72			●														
Mobile Memoir Mobile Memoir, LLC, p. 80																	
MPE Data Entry & Editing DATAN, Inc., p. 75					●												
mr Studio SPSS MR USA, p. 86		●															
MR Translate SPSS MR USA, p. 86																●	
MrHUB Marketing and Research Data Consultants, p. 78				●		●											
mSITE PAI-Productive Access, Inc., p. 81					●	●											
mTAB Research Analysis System PAI-Productive Access, Inc., p. 81					●	●											
Mystery Shopping Software ARL-Products, p. 73																	
NamePro The NameStormers, p. 80										●							

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Nebu Office Suite NEBU b.v., p. 80						●											
Net-ACA Global Market Insite, Inc., p. 76						●											
Net-DB Global Market Insite, Inc., p. 76											●						
NET-Focus Global Market Insite, Inc., p. 76											●						
Net-Panel Global Market Insite, Inc., p. 76								●									
NetRaker Intelligence Platform NetRaker, p. 80									●			●					●
NUD*IST 6 QSR International, p. 82						●											
NVIVO QSR International, p. 82						●											
Online Focus Groups Itracks, p. 78									●								
PCensus Tetrad Computer Applications, Inc., p. 87							●										
PEER Planner for Windows Delphus, Inc., p. 75						●											
Perception Analyzer MSInteractive - Perception Analyzer, p. 80	●																
POV2000 Your Perceptions, p. 89	●																
PrefSolv Market Advantage Consulting & Software, p. 78					●												
Pronto Telephony Solutions VOXCO, p. 88														●			
PRO-T-S Telephony Systems PRO-T-S Telephony Systems, p. 82														●			
P-STAT P-STAT, Inc., p. 82		●													●		
QBAL Jan Werner Data Processing, p. 89															●		
QGEN Jan Werner Data Processing, p. 89		●															
Q-Leap The Analytical Group, Inc., p. 72			●														
QPSMR REFLECT QPSMR Limited, p. 82						●											
QualBoards 20/20 Research/QualTalk, p. 88											●						
QuestionPro QuestionPro.com, p. 82						●					●						

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Quick Tally Quick Tally Audience Response Systems, p. 82	●																
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Reply Fleetwood Group, Inc., p. 76	●					●											
Research Reporter nsight Marketing Systems Pty. Ltd., p. 78								●									
Research Tracker II MDSS, p. 78							●	●	●						●		
The Rite Site Easy Analytic Software, Inc., p. 75							●										
Rog Panel Rogator AG, p. 84								●							●		
RV2 Able Software Corp., p. 72							●										
SegmentSolv Market Advantage Consulting & Software, p. 78					●												
SendQuest TeleSage, Inc., p. 87				●		●											
Smart Forecasts Smart Software, Inc., p. 85						●											
Snap Express Snap Software, p. 85						●											
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Snapline Snap Software, p. 85						●											
Snaptrac Snap Software, p. 85						●											
Specwriters' Work Bench ATP Limited, p. 73		●															
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Statistics Calculator StatPac, Inc., p. 86						●											
StatXact Cytel Software, p. 74						●											
StatXact Procs for SAS Users Cytel Software, p. 74						●											
SuperCROSS Alta Plana Corporation, p. 72				●	●	●											
SuperSTAR Alta Plana Corporation, p. 72		●		●		●											

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SuperWeb Alta Plana Corporation, p. 72				●		●											
Surview Sales Development Bruce Bell & Associates, Inc., p. 74						●											
TransCAD Caliper Corporation, p. 74							●										
Trial Map Spring Systems, p. 86						●											
Turbo Spring-Stat Spring Systems, p. 86					●	●											
USORT The Uncle Group, Inc., p. 88		●															
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WinLink The Analytical Group, Inc., p. 72			●														
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Yaps ATP Limited, p. 73						●											
Zipfind Xionetic Technologies, Inc., p. 89							●										

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Trade Talk

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product marketers, engineers and members of external sectors. Once a worthwhile concept is identified, the team sets to work, each person bringing their individual areas of expertise to bear. This process has taught the Group how to quickly refine the promising concepts that arise from the one-on-one customer visits and test them on the next visitors.

Recipe for success

The report closes with a summation of the factors that contribute to HP's product design success. While they are specific to HP, they certainly sound like a recipe any firm could use: "The HP experience demonstrates the need to have a process in place to handle any idea, identify useful innovation, and protect the 'seed.' It also shows that having a team of free thinkers is critical, as is identifying an executive champion. Having consistent funding, and keeping communications open, with the knowledge among team members that risks are okay and that failure is certainly possible, are also key to success."

Marketing Meets Design, by Lily Aguirre Just and Rommel Salvador (Report No. 03-102), is available from the Marketing Science Institute (www.msi.org). Q

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By Joseph Rydholm, *Quirk's* editor

Success by design

The Marketing Science Institute has issued a report on a conference called Marketing Meets Design, which was held in New Orleans in January 2003 and co-sponsored by the Marketing Science Institute and the Yaffe Center at the University of Michigan. The report, compiled by Lily Aguirre Just and Rommel Salvador, has a wealth of interesting information on the best practices of several design-centric firms.

Speaker Sam Farber, founder of OXO International, maker of those black-handled kitchen gadgets that seem to be in everyone's utensil drawers, told the gathering about how OXO identified deficiencies in products on the market and coupled that with research in which they watched consumers use various kitchen tools. Pretty standard stuff, really. The trick of course is to use that information to make useful, quality products. Because consumers recognize added value, the report says, and will pay more for a good product. So if you can engender loyalty *and* charge a premium for your product, you've struck gold.

Farber noted that consumer emotion plays a strong role in the loyalty process. "The product design must be such that consumers easily perceive the innovation and feel that the product satisfies a need," the report says. "Further, the experience can be emotional, evoking feelings of joy, well-being and accomplishment. With this experience, consumers recognize added value and ultimately, identify the brand with innovative products."

Whirlpool Corporation's Philip Thompson made some similar points, mentioning that consumer preference is achieved through relevance (how a brand connects to the target consumer) and difference (how the brand distinguishes itself from the competition). Whirlpool too relies on a user-centric product development approach, giving a consistent look and feel to its products which, much like OXO's, extends the core brand attributes.

Those attributes, when clearly understood by the development team, can almost serve as a jump start when it comes time to create a new product. If the team knows what it means to be a Whirlpool product, for example, it has a strong foundation upon which to build. Of course, it helps if consumers share that same sense of brand make-up. I suspect many a failed product has had promising beginnings and a devoted development team that just couldn't transmit the right feelings to consumers.

Powerhouses Procter & Gamble and Hewlett-Packard supplied some of the most interesting information. P & G's Claudia Kotchka told of how product design used to flow from a breakthrough in chemistry in the R&D department to marketing, where the product concept was developed, to design, where labels and graphics were created, and finally to a group that addressed manufacturing issues of feasibility and cost.

These days, a "Visual Identity Team" of marketers, designers, R&D people and external design consultants comes up with a "holistic consumer offering." Using ethnographic and other consumer research the team identifies design requirements for new products and notes the design aspects that cannot be compromised during manufacturing.

Christian Landry of HP said that the firm believes that a company must be "idea-led" and consumer-informed. To that end, HP allows customers to visit HP design studios for one-on-ones with designers. Landry acknowledged that this entails risk but said the design studio approach has "fueled the fire of innovation" at the company.

An "aha" team within HP's Personal Systems Group meets every two weeks to look at innovations and ideas. The group includes strategic marketers, designers,

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