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FEBRUARY 2006

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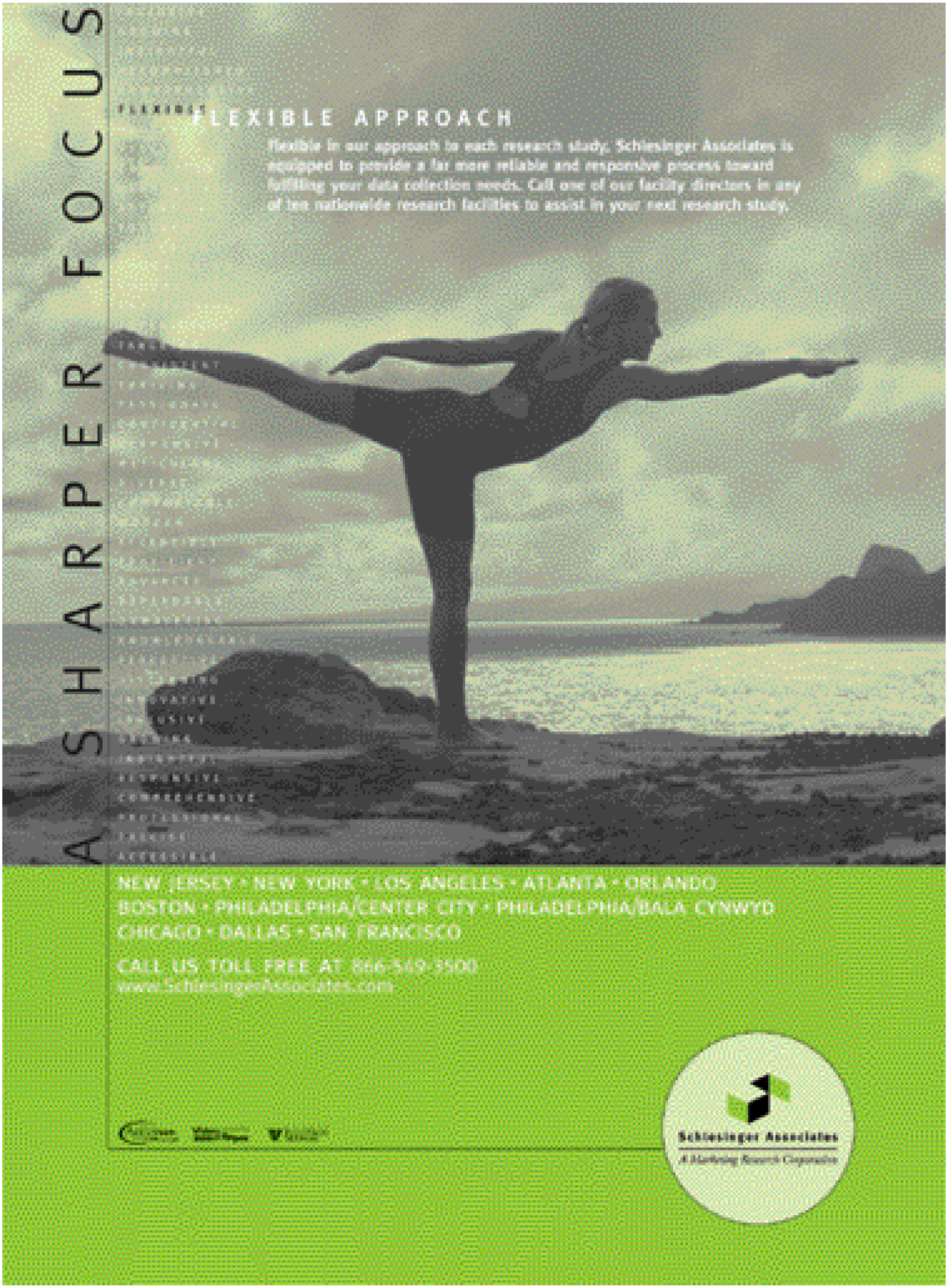
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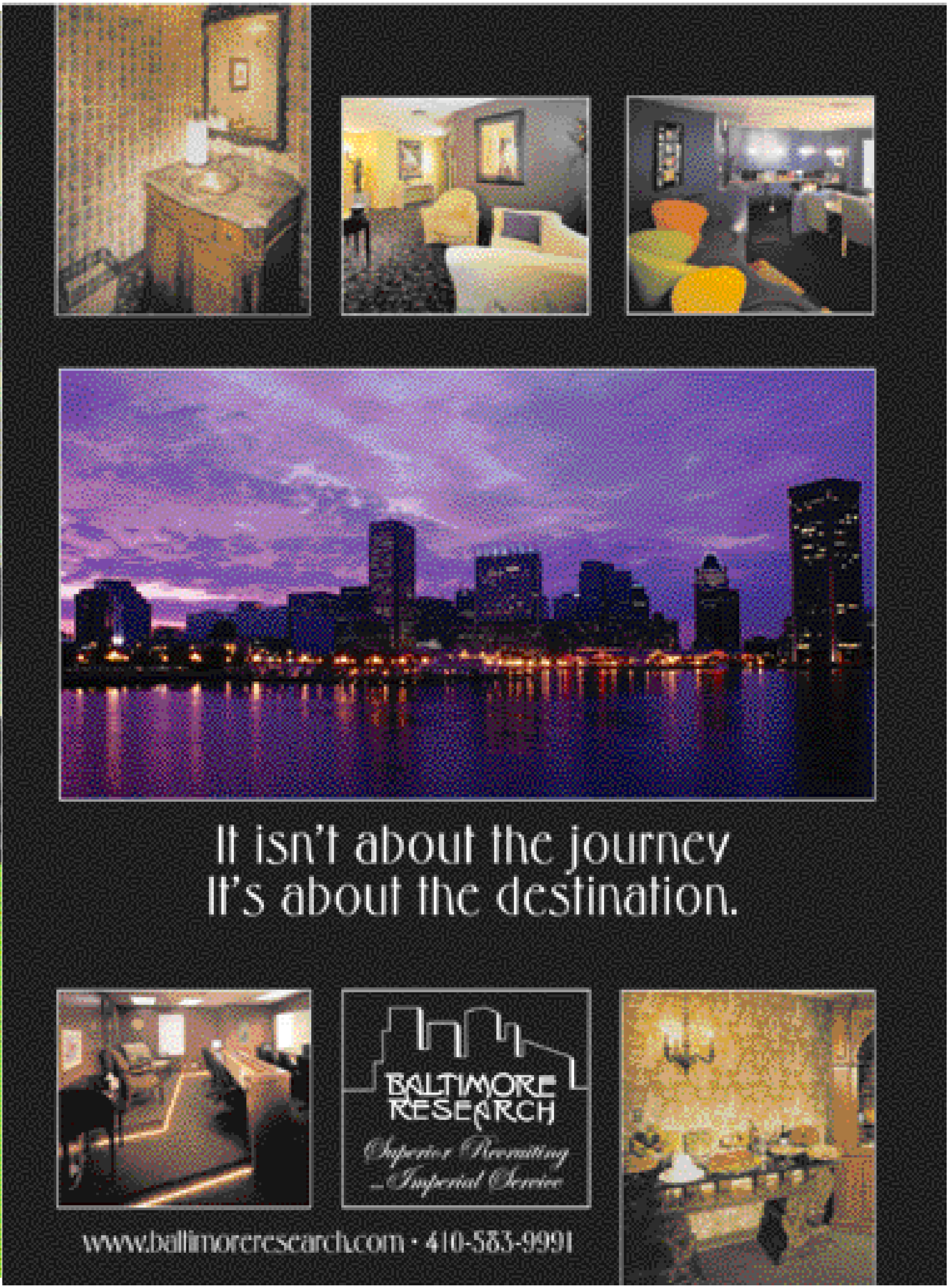
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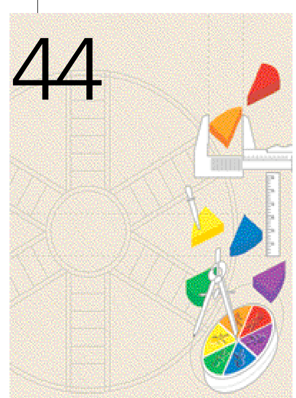

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In case you missed it...

news and notes on marketing and research

Is there a German word for cupholder?

A January *Wall Street Journal* article gave an entertaining look at a large-scale ethnographic research effort by Volkswagen to find out what drives Americans' love affair with their cars. The 18-month project, dubbed "Moonraker," has put VW engineers on the road and in the passenger seat with car owners to better understand how we use our cars and how VW can make its cars more appealing to U.S. drivers. The project was launched in response to the heavy losses in the past two years posted by the U.S. unit of VW, losses caused by declining sales, unfavorable exchange rates and quality problems.

The VW team hit 24 states in its first 24 days here, visiting the Mall of America in Minneapolis, the Rock and Roll Hall of Fame in Cleveland and attending a rodeo and a drag race in Dallas. Team members have also ridden Greyhound buses, rented rental cars and taken red-eye flights and subway trains, all in the name of getting a true feel for the many ways to travel the United States.

What have they learned so far? "In Germany, it's all about driving. But here, it's about everything but driving," said VW designer Reto Brun. "People here want to use their time in other ways, like talk on the cellphone."

VW engineer Volker Jagodzinski spent a day observing a single mother as she ran errands and shuttled her kids to school. "I began thinking about what specific features her car needed," he said. "It was about living the customer's life and putting ourselves in their place."

While it sounds like the team is gathering a lot of useful data, it seems to be having a hard time convincing the people at VW HQ in Germany that things like cupholders really are important features. To bring the experiences closer to home, the U.S. team sends short movies of its experiences to headquarters each month.

Despite some of the resistance to the findings, VW appears to be convinced that this type of immersion exercise is worthwhile. It has started another one, dubbed "Swan Lake," for the China market and is also launching a similar program in India.

"VW's American Road Trip," *Wall Street Journal*, January 4, 2006

Grocers, food makers find growth in gluten-free

The December 2005 issue of *Facts, Figures and the Future*, a monthly e-newsletter from the Food Marketing Institute, ACNielsen and The Lempert Report (www.factsfiguresfuture.com), reported that grocers and food makers are working to meet the needs of consumers suffering from celiac disease, a gastrointestinal problem caused by intolerance to a grain protein found in wheat, rye, and barley called gluten.

For those suffering the affliction, gluten consumption damages the wall of the small intestine, which impedes the absorption of nutrients into the blood system. Once an afterthought in the overall scheme of health issues, today celiac disease (or gluten intolerance) has gone mainstream, affecting an estimated one in 133 (or 2.18 million) Americans. What makes the disorder so difficult to deal with is that there is no known cure; the only treatment currently available is abstinence from products containing gluten. This is a difficult task, as there are hidden sources of gluten in the ingredients of many processed foods.

Because of the sheer size of the gluten-sensitive audience, manufacturers and retailers have taken notice and now offer products addressing the problem. According to ACNielsen LabelTrends data, nearly $400 million was generated at retail (mass, club, grocery, excluding Wal-Mart) by products bannered as gluten-free for the 52-week period ending October 8, 2005. That represented a 6.2 percent increase in retail dollars, which followed a 16.9 percent increase the previous year. Furthermore, 325 new gluten-free products were introduced over the past year, raising the total number of UPCs to 1,220.

In response to the growing market, many grocers have gone beyond simply carrying gluten-free products and are introducing shelves and entire sections of gluten-free items. The Portland, Maine-based Hannaford Bros. grocery chain, for example, with 140 stores serving northern New England, upstate New York, Virginia and the Carolinas, has recently added gluten-free sections to its format.

The Rochester, N.Y.-based Wegmans Food Market chain was substantially ahead of the gluten-free product curve. In 1985, Wegmans created "Gluten Sensitivity, Making a Special Diet Easier to Swallow," a booklet for its shoppers. In addition, in the late '90s, Wegmans launched a "Wellness Key" initiative in which all gluten-free store-brand products were labeled with a "G" for easy identification. Today, the firm's Web site includes a complete list of the branded gluten-free products it carries.

"Grocers Discover New Market: Gluten-Sensitive Consumers," *Facts, Figures and the Future*, December, 2005.

Burger chain slims down, beefs up

Blame focus groups for this one. When burger chain Hardee's was looking for a way to set itself apart from the likes of McDonald's and Burger King, it hired L.A. ad agency Mendelsohn/Zien to revamp its menu and boost its flagging sales. After research respondents repeatedly said they longed to be able to buy thick, juicy burgers like those found at T.G.I. Friday's at fast-food restaurants, the agency directed the chain to go big, bigger, biggest with its menu. That was in 2003. The Thickburger line debuted in April of that year and same-store sales increased in 23 of the following 27 months.

An equally hefty driver of the chain's turnaround, as chronicled in an October 2005 *Business 2.0* article, has been the work of Andy Puzder, CEO of Hardee's parent CKE Restaurants. Over a two-year period, he visited 300 Hardee's stores, experiencing firsthand the poor food, lousy service and unclean facilities. As a result, he pared the company's cumbersome employee manual down to 12 salient points, remodeled some restaurants and closed others, and simplified the menu to focus on mammoth burgers.

If the nation goes through another bout of lite-food mania, the chain could be in deep trouble. (Even its new Red Burrito taco salad is loaded with ground beef.) But for now, Hardee's seems to have found a niche it can sink its teeth into.

"Fat Sells," *Business 2.0*, October 2005


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Teens say they are eating healthier

More than half of teens surveyed say they have changed their diet over the past year and are eating healthier foods, and more than half express a desire to eat better in the future, according to results from New York-based BuzzBack Market Research's 2005 Teen Health and Nutrition Survey.

Accomplishing their eating-related

goals has significant psychological rewards in addition to the physical benefits as they feel a real sense of satisfaction and pride. However, teens' desire to "eat better" is sometimes thwarted due to a perceived lack of products that effectively combine healthy, convenient (quick to make/eat on the go), affordable, and good-tasting qualities.

For most teens, being healthy means looking good (i.e., being in shape and not gaining weight) and feeling good (having energy, eating the right foods, and having a balanced diet). Like adults, teens feel pressure from media/society to look a certain way. Less than 40 percent of teens surveyed say they are happy with their current weight. Although primarily concerned about how they look and feel now, many teens also think about the future and how their current diet could impact their health later in life. Products that can help alleviate these concerns are appealing.

Teens today are very aware of the wide array of food choices available to them. They believe that diet can have a direct impact on their health, well-being, energy levels, and performance in sports, weight and appearance. They prefer to eat foods that are good for you but don't want to sacrifice taste. Teens today are also constantly on the move - they want foods that are quick to prepare and can be eaten on the go. Perhaps because they are so active and still growing, snacking is a significant part of their eating routine.

The study affirms that teens are receptive to change and love trying new products - of the teens surveyed more than two-thirds tried a new snack, food or beverage within the last year, and among younger teens, the percentage was even higher (75 percent).

For teens, two of the most important attributes for new products are "fresh" and "convenient." Teens also tend to find food with added benefits (e.g., extra vitamins) more appealing than foods with reduced levels of ingredients (e.g., reduced salt, reduced carbs). Approximately one in five teens express interest in products with no caffeine, products with extra caffeine, and vegetarian or vegan products. Although a minority, these segments may be fast growing and soon large enough to support niche offerings. Teens appear to wholeheartedly embrace the concept of you are what you eat: they look to food as a means to help them look good, feel good, and have more energy.

The findings suggest some new product opportunities. There may be an opportunity for more to-go breakfast foods, as breakfast is the meal that is most often skipped or eaten on the run. With respect to beverages, the demand among teens for bottled waters and fruit juice-based products is large and growing. Teens are also looking for healthier sodas that taste good. Teens are interested in healthier snacks, but do not want to sacrifice taste and, at least for older teens, need options that fit their budget.

Although both male and female teens exhibit high levels of involvement in food selection, females tend to be even more involved and analytical. Females are also more concerned about their weight and, therefore, more cognizant of a food's caloric and fat contents. A larger percentage of females than males eat foods perceived as especially healthy and low-calorie (e.g., water, smoothies, fruits and vegetables). More females than males also say they would be interested in vegetarian or vegan options, and look for foods with added nutrients. Males, who are comparatively less interested in weight-control and more interested in foods' performance and strength-enhancing properties, find foods with added protein more appealing. One interesting finding is that females are as interested as males in having a lot of energy (and they are exercising with the same frequency), yet a much higher percentage of males are consuming "energy" drinks and foods. There may be an opportunity for performance/energy enhancing products that are perceived as more gender-neutral or are specifically targeted to females.

The differences between younger (13-16 years old) and older (17-19)

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names of note

Minneapolis-based retailer *Best Buy Co., Inc.* has promoted **Dave Williams** to senior vice president, customer centricity.

Wilmington, Del.-based financial services company *Wilmington Trust Corporation* has added **Susan D. Whiting** to its board of directors. Whiting is president and CEO of *Nielsen Media Research* and executive vice president, *VNU Media Measurement and Information*.

Cheskin, a Redwood Shores, Calif., research firm, has named **Jim Martin** executive vice president, business development director in its New York office.

Deborah Klein Walker, a principal associate in the health policy and clinical research division of Cambridge, Mass., research firm *Abt Associates*, has been named president-elect of the American Public Health Association. After serving in this position during 2006, she will continue as president in 2007.

New York PR firm *Burson-Marsteller* has named **Mark Penn**, founding partner and president of research and strategic communications firm *Penn, Schoen & Berland Associates* (PSB), as worldwide CEO. PSB will become a stand-alone division of Burson-Marsteller, reporting to Penn.

Millward Brown has appointed **Surekha Poddar** to head its customer loyalty management business in Asia Pacific. At Millward Brown USA, Fairfield, Conn., **James Cummings** has been promoted to vice president.

John J. Lewis has been named president and CEO of *ACNielsen U.S.A.*, Schaumburg, Ill.

Netherlands-based information firm *VNU* has named **Steven M. Schmidt** president and CEO of its marketing information group, which includes firms such as ACNielsen, BASES, Spectra, Claritas and ACNielsen HCI.

London-based *Research Now* has promoted **Fiorella Calderon Boza** to client development manager for the Spanish market.

Boza

Priyadarshini

GfK Healthcare Asia has named **Keren Priyadarshini** director of healthcare in Singapore.

Alex Kormushoff has joined Chicago-based *SPSS* as senior vice president of worldwide services.

Research firm *TNS Healthcare*, New York, has formed a new business development organization and named **Bill Romania** to lead it. He will continue in his current role as COO of TNS Healthcare, North America, expanding his responsibilities to include business development and client relationship management in the U.S.

MarketTools, Inc., San Francisco, has appointed **Jeff Greenberg** president of worldwide operations. The firm has also named **Pamela S. Kramer** chief marketing officer and **W. Michael Conklin** chief methodologist.

Brian Compare has been named vice president of programming and marketing research at *Court TV*.

New York researcher *FIND/SVP* has named **Rich Forzani** vice president of sales and **Jack Foreman** vice president of product and channel development.

John Markham and **Gaye Myatt** are two of the newest members of the *Independent Consultants Group*, a U.K.-based organization of independent research consultants, having left their corporate jobs at Nokia and GlaxoSmithKline, respectively, to become independent consultants.

Arbitron Inc., New York, has named **Sandra London** national account manager for Arbitron's advertiser marketing services. She will work out of her Milford, Conn., office. In addition, Arbitron has named **Polly Deen** account manager for its advertiser agency services. She will work out of the Dallas office. Separately, Arbitron has reorganized the responsibilities of two executives in order to speed the commercialization of the Portable People Meter audience measurement system. **Owen Charlebois** has been named president, operations, technology, research and development, and **Pierre Bouvard** has been appointed president, sales and marketing.

Seattle-based *Alaska Airlines* has named **Greg Latimer** managing director of brand and product marketing, a newly created position overseeing a range of marketing functions, including consumer research.

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product and service update

Study examines Chinese-American health care

New York-based Kang & Lee Advertising has released results from its Chinese American Consumer Healthcare & Pharmaceutical Study. The study, fielded by Simmons Market Research, was developed to match the content of the Health & Medicine section of Simmons' semi-annual National Consumer Survey which is fielded in both the general and Hispanic markets. As such, Kang & Lee's Chinese study results can be indexed against both general market and Hispanic consumers.

The new study provides a range of data about Chinese-American consumers including usage (by both category and brand) of over-the counter pharmaceuticals including vitamins and mineral supplements, analgesics (both adult and pediatric), cold remedies, heartburn and indigestion aids, laxatives, cough syrups, pain relieving rubs and liquids, bandages and topical antibiotic remedies, products aiding vision, and others. In addition, the study provides benchmarks for the incidence and current treatment patterns for a list of medical ailments and diseases, including usage of specific prescription pharmaceutical brands within the last 12 months. The study also queried a range of consumer attitudinal measures with respect to health care and treatments, ranging from the propensity of consumers to get regular checkups, to preference for Chinese vs. non-Chinese medical treatments and doctors, to key sources used by Chinese to obtain health and pharmaceutical information.

The study was fielded in the spring of 2005 with a random sample of Chinese-American adults from the top Chinese DMAs in the country (including New York, San Francisco and Los Angeles). Respondents were pre-recruited by telephone and then mailed a detailed questionnaire in their "language of comfort" - Chinese or English. Based on the pre-recruiting, a total of 1,802 questionnaires were mailed, and 778 completed surveys were returned - resulting in a response rate of 43.2 percent. Eighty-six percent of respondents opted to reply to the questionnaire in Chinese. For more information visit www.kanglee.com.

ESRI releases mid-decade update of Community Tapestry

The data development team at Redlands, Calif.-based ESRI has completed the mid-decade update of its segmentation system, Community Tapestry. Since Census 2000, several demographic changes have occurred and have been included in the update. The U.S. population has increased by 17.3 million people. Another 16.8 million teenagers have come of age. Nearly seven million new households have been created; 6.7 million residents have become homeowners. The average household income increased by 21 percent. The average home value has jumped 57 percent.

These demographic and lifestage changes have caused the reassignment of some neighborhoods into several Tapestry segments. Aging populations have shifted neighborhoods from the Rustbelt Traditions segment into Rustbelt Retirees neighborhoods. Marriage and family changes have moved some Laptops and Lattes singles' neighborhoods into Urban Chic neighborhoods of professional couples. Population growth has been reflected in diverse markets such as International Marketplace, Pacific Heights and Urban Villages. Areas in transition, such as neighborhoods in Old and Newcomers, have settled into new Tapestry markets such as Trendsetters. Median home value has topped $1,000,000 for Top Rung neighborhoods, Tapestry's most affluent segment. The median age of residents in Tapestry's oldest segment, the Elders, has increased from 72.8 years to 73.4 years. For more information visit www.esri.com/tapestry.

Online groups provide early feedback

Menlo Park, Calif., research firm Knowledge Networks has launched a new resource, KnowledgeCommunities, which will provide ongoing marketing feedback from consumers in such niche influencer groups as ailment sufferers, home improvement buffs and wine enthusiasts. KnowledgeCommunities has been developed through a partnership with interactive publisher and technology company morefocus group inc., which has built online consumer groups encompassing more than 12 million people with shared interests. To attract consumers and registrants, morefocus uses a network of Web sites and newsletter publications.

KnowledgeCommunities is designed to provide marketers an early read into their customers and prospects. In addition, the morefocus content infrastructure lends itself to expanding into communities that clients may be interested in tapping.

KnowledgeCommunities draws on the morefocus consumer and patient groups to create communities whose members are involved in specific topics and can provide a level of expertise and engagement. Groups created by morefocus include, for example, consumers with a keen interest in health-related topics, exercise, gardening and travel. For more information visit www.knowledgenetworks.com or

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research industry news

News notes

Wilton, Conn., research firm **Greenfield Online, Inc.** announced a major cost-cutting initiative in December which it estimates will save it approximately $7 million of projected annual operating costs compared with its third-quarter 2005 annualized operating expense run rate.

The company has reduced annual salary and benefits costs by $2.8 million. Total North American staffing has been reduced by 39 positions. In 2006, offices in San Francisco and Durham, N.C., will be closed. The Encino, Calif., office will be reduced or moved to a smaller local facility. Reductions of general and administrative expenses will total $3.2 million, including an expected reduction of public company expenses of $1.5 million. Cost of goods sold will be reduced by $1 million.

In the fourth quarter of 2005, the company expected to record a charge of approximately $400,000 for severance and expenses related to the reduction in force.

In 2006, the company expects to record an additional restructuring charge of between $400,000 and $700,000 related to office closings and relocations described above, as well as certain final personnel charges related to the current reduction in force.

"It is absolutely essential that we rightsize," said Albert Angrisani, the firm's president and CEO, in a company statement. "Also, it is absolutely essential that we rightsize in the right way. In broad terms, we have three imperatives: one, eliminate costs that bring little or no value to our customers; two, identify areas that can bring major benefits to customers; and three, invest in the people that can best deliver these benefits. We have simple but ironclad guidelines for the first task. Wherever a cost does not contribute to our business, wherever the elimination of that cost does not reduce the quality of our services, we will eliminate it, period."

Netherlands-based **VNU** announced in December that the European Commission has closed its investigation into the contracting and pricing practices of VNU subsidiary ACNielsen. ACNielsen competitor Information Resources, Inc. (IRI) had complained to the Commission, triggering the investigation last March. After review of IRI's complaint and conducting its own inquiry, the Commission terminated its investigation, having found no evidence

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Calendar of Events February-May

ESOMAR will hold a conference on health care research on February 6-8 at the New York Marriott East Side Hotel. For more information visit www.esomar.org.

The Institute for International Research will hold a conference on return on marketing investment on February 6-8 at the South Seas Resort, Captiva Island, Fla. For more information visit www.iirusa.com/romi.

The International Quality and Productivity Center will hold its annual Kid Power food and beverage conference on February 6-9 at the Safety Harbor Resort and Spa, Safety Harbor, Fla. For more information visit www.kidpowerx.com.

ESOMAR will hold Brandmatters 2006, a conference on branding research, on February 8-10 at the New York Marriott East Side Hotel. For more information visit www.esomar.org.

The Institute for International Research will hold a conference on linking customer feedback to business results on February 27-March 1 at the Bonaventure Resort and Spa, Ft. Lauderdale, Fla. For more information visit www.iirusa.com/customer.

ESOMAR will hold a conference on automotive research on February 27-March 1 at the Beau Rivage Palace in Lausanne, Switzerland. For more information visit www.esomar.org.

ESOMAR will hold its Asia-Pacific conference on March 19-21 at the JW Marriott Hotel Mumbai. For more information visit www.esomar.org.

The Institute for International Research will hold the Conference on Marketing on March 20-22 at the Venetian hotel in Las Vegas. For more information visit www.theconferenceonmarketing.com.

The Advertising Research Foundation will hold its annual conference on March 20-22 at the Marriott Marquis Hotel in New York. For more information visit www.thearf.org/conferences/annual.

Britain's Market Research Society will hold its annual conference on March 22-24 at the Barbican, London. For more information visit www.mrs.org.uk/res06/.

The twelfth Sawtooth Software conference on acquisition and analysis of market research data will be held on March 29-31 in Delray Beach, Fla. For more information contact Danell Neibuhr at 360-681-2300 or visit www.sawtoothsoftware.com.

Salford Systems will hold a conference on data mining on March 29-31 in San Diego. For more information visit www.salforddatamining.com.

The Society of Competitive Intelligence Professionals will hold its annual conference on April 26-29 at the Disney Coronado Springs Resort in Orlando, Fla. For more information visit www.scip.org.

ESOMAR will hold a conference on global diversity on May 8-10 at the Eden Roc Renaissance Resort and Spa in Miami. For more information visit www.esomar.org.

ESOMAR will hold Innovate 2006, a conference on research innovation, techniques and technology, on May 10-12 at the Eden Roc Renaissance Resort and Spa in Miami. For more information visit www.esomar.org.

Canada's Marketing Research and Intelligence Association will hold its annual conference on May 31-June 2 at the Westin Hotel, Calgary. For more information visit www.mria-arim.ca.

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By Stephen J. Hellebusch

Ordered up wrong

One phenomenon that has always baffled is why anyone would hire an expert to work on a project and then order the expert to ignore his/her knowledge and do it wrong. A recent experience drove home the confusion in a pointed way.

As many marketing researchers familiar with statistics are aware, you use a different statistical test when you have three or more groups than you do when you have only two. The automatic statistical testing that is very helpful in survey data tables does NOT "know" this, and cheerfully uses the two-group test in every situation, regardless. Each statistical test addresses a slightly different question, and the question is very important in the selection of the correct test to use.

In a recent "pick-a-winner" study, we had three independent groups, each one based on a different version of a concept – Concepts A, B and C. We used a standard purchase intent scale (definitely will buy, probably will buy, might or might not buy, probably will not buy, definitely will not buy), and the question was: How do we test to see if there is any difference in consumer reaction to the three?

The first test was analysis of variance (ANOVA), which addresses the question: Do the mean values of these three groups differ? We used weights of 5 (for "definitely will buy"), 4, 3, 2 and 1 (for "definitely will not buy") and generated mean values for each of the three concepts. The ANOVA showed that the means did not differ significantly at the 90 percent confidence level, which leads to the conclusion that consumer reaction to these three concepts on purchase intent does not differ, on average.

At this point in the project, the client was displeased, and told us to test using the "definitely/probably will buy" percentages (the top two box). This is another testing option that makes sense. The chi-square test addresses the question: Do these three percentages differ? It is the proper test to use when there are three or more percentages to test across three different groups of people. We conducted it, and learned that the percentages did not differ significantly at the 90 percent confidence level. It told us that, with respect to positive purchase interest, across all three products, the consumer reaction in terms of the top two box was the same.

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The wrong test

The client was displeased. Having conducted the testing himself, he learned that Concept B was significantly lower than Concept A, both in the top two box and in the top box, at the 90 percent confidence level. He told us not to use the

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chi-square, but to use the test the data tables use. The Z test addressed the question: Do these two percentages differ? When it is misused in a situation where there are three or more groups, this testing method disregards key information, and makes the determination after having thrown out data. To please the client, we conducted multiple Z tests and determined that there were no statistically significant differences between any of the three pairs (A vs. B; A vs. C; B vs. C) at the 90 percent confidence level. The client had another person in his department conduct the test, and that testing showed, as the client's had, that the top two box for A was significantly higher than B's at the 90 percent confidence level.

Fairly confused at this point, we ran the data tables, which showed, exactly as the client said, that A was significantly higher than B at the 90 percent confidence level, both on the top two box and on top box percentages.

The less-preferred formula

We then conducted the three tests by hand, and compared our Z values with the client's. We learned that the client, his department mate, and the statistical testing in the survey table program all used the less-preferred Z test formula. There are two versions of this test. One of them does not use the recommended correction for continuity. This, essentially, is a very small adjustment that should be made because the basic formula assumes a continuous variable (peanut butter) and we are actually working with a discrete variable – people (peanuts; the count of respondents making up the top two box). Normally, it makes no difference in the results, because it is so small. In this case, however, it made the difference between crossing the line into significance and not crossing it.

With that resolved, we discussed the client's desire to test every row of the scale, with the wrong statistical test, using the less-preferred formula. We were told that the client always does this, and that we should do so. So, we did.

The wrong way

This procedure violates the fundamental logic behind testing. By testing the top two box, we have tested the difference between these three concepts on this scale. When we test the five rows of the scale (and various other combinations of rows), using multiple Z tests, the probabilities are so distorted that it is doubtful anyone knows the confidence level at which we are really operating.

So, we successfully used the less appropriate formula with the wrong test and followed the wrong procedure for testing. We remain baffled. | Q

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By Tara Hutton

My cell phone, my life

Consumer Electronics Association uses online qualitative to get the 411 on kids and their phones

Today's youth population, the so-called Net Generation born between 1980 and 1996, is undoubtedly of great interest to the consumer electronics industry. They are the first generation to grow up in the digital world, with the proliferation of the Internet and the introduction of such consumer technologies as wireless phones and DVDs. Since this population segment represents the first tech-savvy generation to enter the consumer buying population it is of great interest to companies involved in the consumer technologies industries. In particular, the Consumer Electronics Association (CEA), a trade association promoting growth in the consumer technology industry, is very interested in gaining insight into the Net Generation. Among CEA's unanswered questions surrounding this generational group are their attitudes, behaviors and interests with regard to wireless phones.

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In the spring of 2005 CEA's market research department set out to answer those questions by designing a study of the youth population with the following research objectives:

• Understand usage behaviors among young wireless users, including time devoted to wireless activities, types of activities, and environment (i.e., location and social circumstance).

• Explore the attitudes, behaviors and desires around various phone features such as text messaging, Web access, mobile instant messaging, photos, or other features.

• Define the attitudes, behaviors and desires around wireless phone personalization such as skins, ring tones and custom personalizations (i.e., glitter).

• Develop insight into behaviors and preferences regarding transporting wireless phones.

How do phones fit?

Instead of using traditional research methodologies such as surveys or focus groups to meet its research objectives, CEA wanted to find a methodology that could engage geographically dispersed youth participants over the course of a week and also provide a rich qualitative picture of how wireless phones fit into their day-to-day lives. For the study, CEA partnered with San Francisco-based KDA Research, which has developed an in-depth qualitative online research tool called KDA Revelation that enables researchers to collect and organize in-depth interviews, group discussions and contextual research data via blogs, bulletin boards, and real-time chats.

CEA decided to use this new methodology rather than any other quantitative or qualitative research methodology for several reasons: the online research medium appeals to tech-savvy youth; it collects both text and image data; and it allows for a deep view into the lives of today's young wireless users by interacting with them for an extended period of time.

A total of 36 youths between the ages of 10 and 19 who owned wireless phones were invited to record their phone usage and related experiences over the course of seven days (May 18 to May 25, 2005) in online journals (blogs) that were set up specifically for them. The study's participants consisted of both girls and boys across the U.S., from a mix of urban, suburban and rural environments, and from a mix of household income levels. In addition to recording their daily phone usage - which included the type of phone activities they were

engaging in (voice calls, text messaging, game playing, etc.); the duration of those activities; who they were interacting with; where those activities took place and the total minutes used – they were also asked about phone personalization, transportation and accessories.

Additionally, the project required participants to spend one day without the use of their wireless phone. Three "cheats" were permitted during the "no phone day" and at the end of the day participants were asked to share their feelings and impressions, as well as how their cheats were used.

Great appeal

The methodology and subject matter of the study seemed to have great appeal to the respondents. Throughout the seven days of the project, they enthusiastically reported on their own personal usage, attitudes and behaviors and about what their peers were doing as well. They seemed very excited to be the "voice" of their peers and to be able to participate in a research project centered on how wireless phones were impacting their lives. The fact that they were contributing via an online tool certainly added to their excitement over the project. Many participants were verbose and creative in their postings. One participant in particular showed his creativity by putting his thoughts about the "no phone day" into a poem:

Silence may be golden
yet - I am beholden
to my phone.

No text
What a mess
I'm all alone, missing my phone.

No cheats - can't compete.

No ring tone
I long
to hear the Jedi voice
I will rejoice!

I can't wait
to communicate
Like Star Wars without the Jedi
I rely and stand by my phone
All alone

Another day, will come my way…
My phone,
is kind.
On Wednesday ALL mine!

From both a client and researcher's perspective, participant excitement is a good sign since it often leads to greater participation and, more importantly, truthful data. If a participant is excited about their participation in a project they will want it to be successful and contribute to the best of their ability.

In this online methodology, the data collected is not limited to text

input. Over the course of the project, participants could and did post photos to support the text they entered into their blogs, which really added value to the project. Participants posted pictures of their phones and how they were personalized by glitter, stickers, face plates, etc.; the social situations in which they used their phones (e.g., one participant took a photo of him and his father fishing and others took pictures of their friends) and the accessories they used such as phone chargers and protective cases. As the saying goes, "A picture is worth a thousand words."

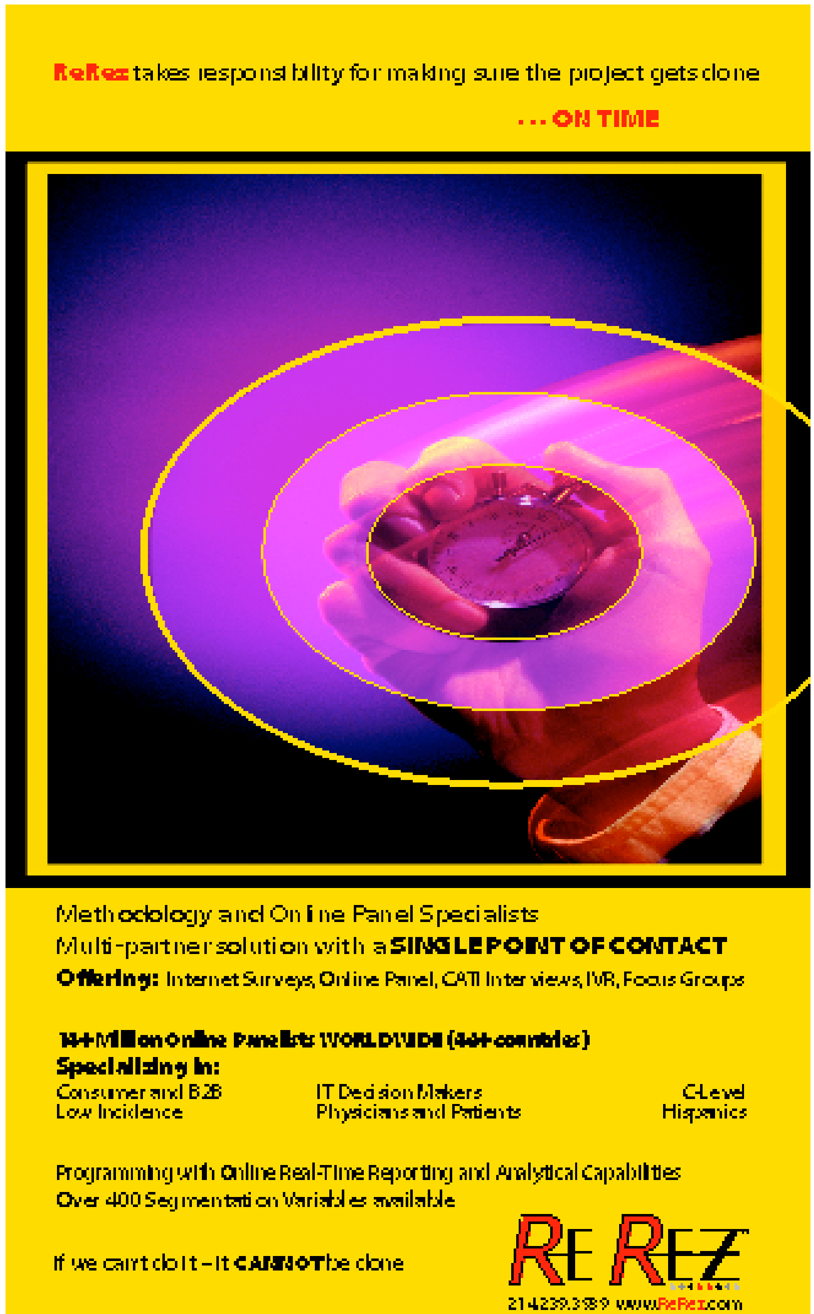
Clear view

Another valuable aspect of using this new methodology is that it gave the CEA a clear view of youths' lives. Wireless phones are cemented into the day-to-day activities of many young people, and in the course of reporting their wireless phone habits throughout the week, participants also revealed what was happening in their lives. In addition to the everyday school, work and family activities, their journaling also chronicled social activities with friends and significant others, special school events such as final exams, graduations, and even college acceptance letters for some older participants. Even private emotional events were noted, such as a funeral and a family health emergency which brought one participant to the hospital. This is information that cannot be unobtrusively gained through other research methodologies.

Too much is a good thing

Overall, the project proved extremely successful. It met CEA's research objectives and exceeded the CEA market research department's expectations of the methodology. "This study is an invaluable directional guide for youth wireless phone behaviors," says Joseph Bates, CEA's director of research. "Through [this methodology], we were able to find that wireless phones are the center of life for many teens today, providing a sense of security and freedom, as well as entertainment and a social resource."

The core challenge with using an in-depth qualitative online research methodology is the immense amount of data gathered. CEA's youth phone project involved 36 participants over a period of seven days and it was difficult to absorb the 679 specific wireless phone uses reported by the participants. However, for a market researcher, if there ever is a good problem to have it is having too much data. The key to overcoming this challenge is having an analysis plan and knowing from the start of the project how you will organize the data as it comes streaming in. | Q



special markets: teens

They're neither big children nor small adults

By Christine Efken

Maximizing qualitative research with teens

They care about what other teens in the discussion group think about how they look and what they say – or they don't care at all. They give you open and honest responses – or they gladly make it all up. They care deeply about the product – or they are only participating in your study because they want the money. They are predictable and unpredictable. Yet, they are a powerful consumer segment that in 2005 spent a projected $159 billion in the United States alone. They are teenagers.

Do you have what it takes to effectively research teens?

There is an old adage: If you want to catch a fish, think like a fish. You may be long past your teenage years, but in many ways, you need to think like a teenager to research teens and catch their true responses to concepts, products and advertising. As difficult as it may be, you'll need to try to remember what it was like to be a teen and empathize with them. You'll need a sincere and genuine interest in this population to succeed with them. Perhaps most importantly, you'll need the ability to be non-judgmental about the opinions they express. Absorb their insights without passing judgment on either the way they express themselves or the ideas themselves. The response of each teen is important since it likely represents the opinions of a significant population that isn't represented in that particular group.

Prior to conducting a qualitative research study with teens, you'll want to immerse yourself in their world. Update yourself on teen trends. Listen to their music. Observe them shopping or using their cell phones, MP3 players, laptops and other electronics. Also, it's easy enough to read their blogs (e.g., www.myspace.com), visit Web sites designed specifically for teens or to thumb through the teen magazines to stay up to date and better understand their interests.

While you seek to immerse yourself in the teen world, you are more likely to gain their respect if you stay grounded in your own. For example, don't dress like a teen, yet don't be too conservative in your dress either. Conveying an image of a judgmental authority figure will probably not encourage teens to fully open up to you and disclose their deepest emotions.

Also keep in mind that teen years can be fraught with insecurity, popularity contests, angst, acne, gossip, worries about college, cars, and just about anything else you can think of. Make their research sessions

Editor's note: Christine Efken is senior research associate at Doyle Research Associates, Inc., Chicago. She can be reached at cefken@doyleresearch.com. This article is adapted from a presentation given at the Qualitative Research Consultants Association National Conference on October 21, 2005.

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Fairfield ■ London ■ Paris ■ Rotterdam ■ Sydney ■ Tokyo focused – talk about the subject matter at hand in a non-threatening way by welcoming and treating each teen as a unique individual and an equal. Never talk down to them.

Teens are neither big children nor small adults. They have their own take on the world around them, which is sometimes more "controlled chaos" than anything else. Be willing to be an advocate for them and differentiate yourself from being just an adult who pushes a product at them. Also remember that a successful moderator of teen consumer groups should have a sense of humor; show them you can have some fun while doing some serious work.

Study design considerations

As with all consumer research, researchers and qualitative consultants need to select a method and design a study that will glean the insights needed to meet the project objectives. While traditional mini-group discussions or in-depth interviews may be most effective for some projects, others studies may benefit from non-traditional methods. Consider the following:

• Ethnographic research. By observing teens outside of the walls of a focus group facility, you can focus on their lifestyles, experiences, feelings and emotions. Through ethnographic studies researchers can uncover the various factors that influence teen behaviors, how they make decisions, the role and degree of influence that friends and family members play in a teen's world, how they relate to others in their personal worlds, and the way they use and interact with your (or your competitors') products. You'd be amazed how often those elusive "ahas" are revealed when you're talking with them in their space.

For example, consider observing teens riding the roller coasters at theme parks, and then conducting interviews with them immediately after the experience. You can gain much richer insight into what they think at that moment, rather than waiting for them to join a focus group discussion days or weeks after the experience.

When selecting a research venue, think creatively about locations that make the most sense for exploring the particular issue at hand such as their homes, coffee houses, school gyms, malls, concerts, restaurants, bus stops, train platforms or beaches.

• "Wired" interviews. Today's teens are unbelievably tech-savvy and use technology to stay connected and informed 24/7. Researchers can capitalize on teens' use of technology by incorporating various electronic and/or telecommunication devices in their research designs.

For example, to better understand the challenges teens face when shopping for a product at a local retailer, why not ask them to use their cell phone to call you from the store or mall to talk about their shopping experience. Ask the teens to send photos to you via their camera phone to help illustrate the experience as it takes place. This type of in-depth interview provides valuable on-site insight and captures the teens' feelings and emotions during the critical decision-making stage in the purchase process.

To better understand at-home activities, consider an electronic interview (e.g., e-mail correspondence) with respondents. In addition to participating in an ongoing dialogue, teens are often willing to take photos using their digital camera and send them to the interviewer as a means of bringing their conversations to life. For example, if the research objective is to better understand the role of after-school snacks, teens can photograph their kitchen pantries or the shelves of their refrigerators to illustrate the products they consider for snacks as well as what they ultimately elect to consume.

• Online focus groups. The benefit of these groups (and telephone focus groups) are that they minimize peer pressure and insecurities, as they allow anonymity for the participants. They are extremely helpful for products in areas that may be sensitive for teens,

such as bed-wetting, feminine hygiene products, teens with diabetes or abused or raped teens. With this method, respondents participate in research discussions over the Internet either in a real-time chat session or in a bulletin board session over the course of three or four days. Additionally, the depth of learning and the quick turnaround time are key benefits of this method.

Bulletin board sessions are typically comprised of 15 to 20 participants and offer key advantages over other kinds of qualitative discussion groups. Rich, thoughtful discussion usually results from bulletin board groups in that more thought is given to responses and they are usually better articulated, as the teens can take the time to phrase and type their opinions. Replies can be better thought out and slower typists can be accommodated, so there are fewer time constraints. Participants appreciate having the ability to go back and review others' comments and answers over the course of a few days.

Real-time sessions offer the advantage of a quick and immediate response. These sessions are typically scheduled for 75 minutes and include six to eight participants.

• Telephone focus groups. Telephone groups offer a cost-effective way to get the opinions of the teen crowd. Further, the phone is a natural communications device for teenagers and they are more willing to admit to interests and behaviors that are not cool. However, drawbacks of phone groups include missing nonverbal expressions and less group interaction. The moderator must pay attention to who is not being heard from and make certain everyone is included.

Online and telephone group discussion sessions are ideal for teens in that:

— They use technology with which teens are highly comfortable.

— Age, race and gender barriers are minimized and teens can be more candid. Moreover, physical appearance issues (e.g., height, weight, acne/skin conditions, etc.) are simply not an issue as respondents have no idea what the other participants look like.

— Geographic coverage is wide; teens in rural locations can be included, and time zones are not a factor or hindrance.

— With bulletin board sessions, clients and moderators can tailor each day's content based on the responses from the previous day. Additional questions can then be posted on the board to probe responses. The back room client feature allows observers to post messages exclusively to the moderator and each other.

— With bulletin board sessions, masking features can be used that ensure that participants answer questions first before they are able to see others' responses. This creates an environment for unbiased opinions.

Recruiting considerations

Once you have selected your research

design and method, researchers then need to think about various recruiting considerations, such as:

• Screening. First, you will have to screen the teen participants carefully to get an effective and dynamic group. When screening the teens, include articulation questions that avoid yes-or-no answers. Consider questions like, "What things do you most cherish and why?" Or, "If you were the principal of your school, what rules would you keep and what rules would you change, and why?" You'll want to get teens onboard who are quick thinkers and who can help share insights. Consider over-recruiting for each session to allow you the opportunity to select the teens for your sessions that best meet your consumer profile or represent the diversity you are seeking.

• Parental involvement. Keep in mind that teens are still minors and you will need parental permission for their participation. Parents can help give demographic information about the household, but don't depend on them to give information about key product usage by their teens.

• Age. Segment as much as possible by age and grade. The way you talk to a 12-year-old and the way you talk to an 18-year-old will be very different. A 14-year-old high school freshman has a far different perspective than a 14-year-old in eighth grade. So try to put freshmen and sophomores together, and juniors and seniors together, for example. A rule of thumb is that there be no more than a two-year age/grade span within the group.

• Gender. When conducting traditional mini-group discussions, you will often get different responses from mixed-gender groups than from single-gender groups. Some teens who are typically very talkative in single-sex groups become self-conscious and withdrawn when in mixed-gender groups; others try to flirt or posture to try to impress the opposite sex. They may state opinions they think will impress the group, rather than saying what they truly feel. Mixed-gender groups tend to be more cautious in their responses. Some examples of topics best addressed in single-sex groups are appearance, nutrition and social issues. Ask yourself if the group would be best served by gender segmentation.

• Smaller group size. Construct a more intimate group by limiting the number to five to seven teenagers, slightly smaller than the average adult group, which will help to keep them focused and give you a deeper and richer understanding of their viewpoints. The larger the group, the easier it is for teens to let others carry the conversation. A smaller group size lets each teen have more time to express their thoughts and allows you to develop a stronger connection with them individually. You can often gain a greater understanding of teens' opinions from four teens than from a group of eight.

Making the connection

Parents and high-school educators will tell you how difficult it can be to establish rapport with teens. Qualitative research consultants can maximize the research experience and add value by considering the following tips:

• Give unconditional positive regard. As a moderator, acknowledge what a participant says despite what you think. Keep the lines of communication open and accepting to maintain rapport with this group. Remember that what one teenager says might represent many teens who are not in the group.

Further, a moderator's verbal and non-verbal responses can encourage or discourage participant communication. Be careful with your facial expressions and not to cross your arms, as teens may think you are closed to their communication and not receptive to their thoughts.

• Set ground rules. Assure teens that they will be respected, but that there will be some structure to the group. No one individual will be allowed to dominate the group session or to simply sit and listen and offer no responses at all.

• Establish a comfort zone. Teens need to trust the environment. Tell them you understand their needs. Let them know they can use their language. You're not passing judgment on their language, but you recognize it's a part of their world, even if it seems harsh or coarse to you. However, do not use their language or slang. Respect that their language is theirs, not yours. You don't want them to think you are trying too hard to be one of them. At the same time, you may have to rephrase some of your language to fit the age group. For example, don't say "frozen novelty" when you mean "ice cream bar or ice cream sandwich."

In addition, when conducting group discussions at a traditional research facility, if possible, try to make the group room warm and inviting by using over-stuffed chairs or love seats as opposed to the more typical boardroom-type settings.

• Pay an "adult" incentive and pay in cash. Teens generally don't want a specific product as payment because they may already own the product or may not think highly of it. The best incentive is cash, which helps teens

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feel they are being paid for a job, commits them to the project, and tends to make them take their work seriously.

• Take time to warm up. Let respondents know you will not pass judgment on their opinions. Encourage varied points of view and emphasize there will be no wrong answers. Let them know they will be expected to show respect for the opinions of others, as well.

• Listen for contradictions. Ask the same questions in different ways. Show them you are listening closely. Challenge them without criticizing. Allow them to articulate what they really mean in a variety of ways. It can be frustrating to hear teens contradict themselves, but keep in mind that you are listening for common themes from session to session.

• Observe body language, facial expressions and tone of voice. Do they reflect passion and excitement or boredom?

• Encourage them to take chances by rewriting or reworking the client's concept or repositioning statements.

Stimulate their creativity

During the group discussion, to enhance the conversation and to keep teens actively involved in the dialogue, researchers should also think about using projective exercises to help teens more easily articulate their thoughts and opinions. Photo sorts, paint chips, mind mapping, collages and other visual aids can be used as stimulus to help articulate abstract thoughts. Be creative when helping teens put their thoughts into language. Encourage them by saying, "Tell me more" or "I find that interesting, how might others view this issue?"

For example, in one session, high school seniors were asked to give their thoughts about their college plans. To help them frame their thoughts, they were given a wide variety of colored paint chips. One teen picked up a black chip and described his feelings as, "a black hole," and then said that he doesn't know where he's going, he has no direction. Another chose green to signify the color of money it would cost to go to college, and then added that her parents just don't have the money. Another chose red because she's getting so angry about all the essays she has to write to get into a good school. Colors helped them verbalize their thoughts.

Another worthwhile research tool to include in your sessions is to ask teens, prior to the discussions, to complete a pre-research assignment. This commits them to the project and gets them thinking about the subject in advance of the session so they can jump into the meat of the discussion much quicker. Some examples of pre-research assignments include:

• sending teens a disposable camera to make a photo journal about their lives;

• asking them to create a 10-minute video that illustrates how they use a particular product or what activities are involved in a specific meal-time setting;

• asking teens to complete a diary, journal or blog;

• letting them go wild in creating collages that convey their aspirations (and perhaps their fears);

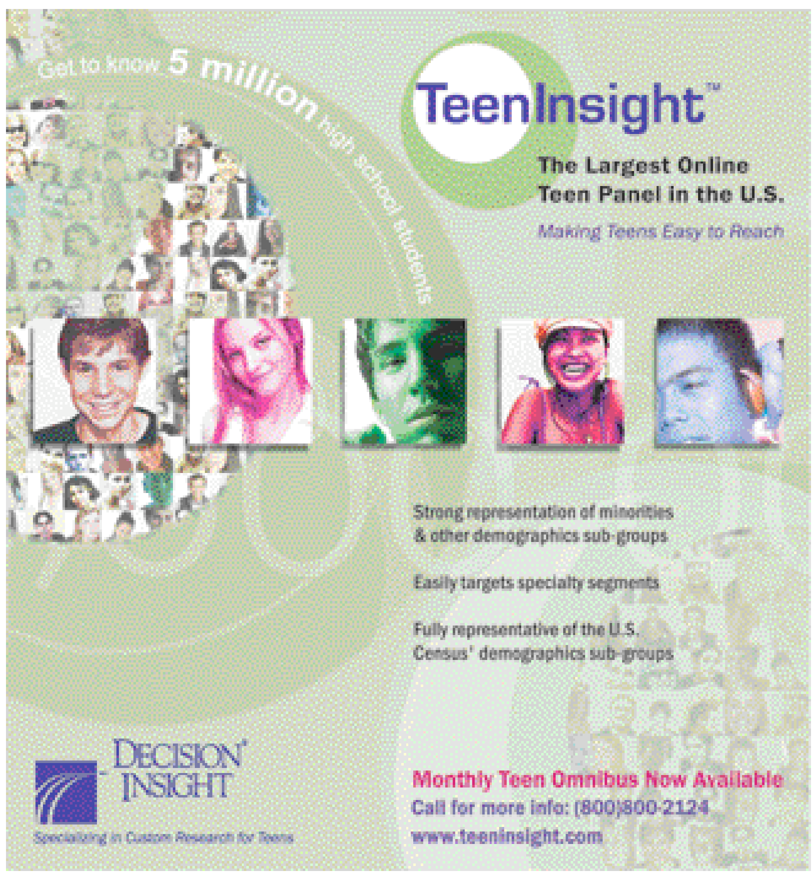
• giving them time capsules to fill with their most important possessions;

• giving them money to shop a specific category and report back to the group about the experience and how they decided which brand to purchase;

• asking them to go online to pull information for a pre-research assignment and then, in the sessions, surfing the Internet with them to review the sites they liked and those they did not.

A challenge

Working with teens can be a challenge. However, learning what really makes them tick from the give and take of qualitative research can provide amazing insight into their worlds. So, open your mind, learn from them, keep them focused and you will serve your teens and your clients well. | Q



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Getting a clearer picture

The reality and myths of gay buying power

By Bob Witeck
and Wesley Combs

In the past few years, news media along with many marketers have frequently touted the reputed high earnings of gay and lesbian households. Some ballyhoo the gay market as a dream market precisely because of its presumed affluence. But is it true?

The more critical questions to ask are whether or not this consumer segment is unique and distinct from other parts of the market and whether marketers may connect with this segment more directly than through conventional marketing channels. The answers are a convincing yes. Gay, lesbian, bisexual and transgender consumers are unusually brand-loyal to companies and brands that reach out to them.

But let's step back for a moment. It stands to reason that a certain portion of America's gay population enjoys notable wealth and higher than average earnings. However, there is actually little evidence to suggest that gays and lesbians - on average - earn more than others. In fact, there appears to be more compelling evidence that gay men may earn somewhat less than their heterosexual counterparts while lesbians, in some analyses, may earn slightly more than heterosexual women.

The questions that marketers and journalists raise go beyond income, however. They also focus on the concept of buying power in particular, and search for understanding about how much economic clout gays and lesbians wield in today's market. When a company decides to pursue the gay dollar, they naturally wish to know what kind of market share they're hoping to achieve.

As market strategists and experts on gay consumer trends, we often are asked by corporate America to gauge the buying power of the gay market as a way to recognize its size and worth in the United States. This is a challenge we happily accept.

Understanding buying power is a fundamental way to acknowledge the many valuable day-to-day contributions that gay Americans make as consumers, workers, families, business owners, shareholders and economic decision makers. Getting this projection right makes a difference to all of us, including marketers.

Buying power starts with population size

The first sticking point is how to credibly project the actual number of gays and lesbians in the United States. If we know the true dimensions of the gay population itself, we have a far greater chance to better

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understand their characteristics, livelihoods and consumer behaviors - and ultimately estimated buying power.

The U.S. Census 2000 provides a uniquely accurate though incomplete population glimpse by tracking only same-sex couple households - or at least those identified with unmarried adult partners of the same sex. The Census data does not identify or track single gay and lesbian adults.

The Gay and Lesbian Atlas, published by the Urban Institute in 2004 and authored by Gary Gates and Jason Ost, provides a superior analysis of the demographics of those who responded to the U.S. Census, specifically gay and lesbian domestic partners.

Gates and Ost also underscore however that the Census itself significantly undercounts same-sex couples and also does not include millions of single gay men and lesbians or gay couples who do not happen to share a common residence. One possible reason for this is because it is still perfectly legal to fire someone just for being gay or lesbian in all but 16 states and the District of Columbia. As a result of this legal discrimination and social stigma, the actual number of people who responded truthfully to the U.S. Census does not reflect the population's true size.

In addition, by focusing only on same-sex male and female couples, we also seem to lose sight of the bisexuals among us - adults who also have strong though not exclusively same-sex attraction and identity and who sometimes enter into same-sex relationships as well but not consistently. For the purposes of our analysis, we intend to include gays and lesbians, as well as bisexuals whose current or most recent partner is an individual of the same sex.

Finally, for the purposes of our market analysis, we have decided not to include transgender adults for two logical reasons. First, transgender people may be either heterosexual or homosexual in their orientation, and therefore do not necessarily have same-sex relationships or attractions. Second and more significantly, however, their true number in the population has been very difficult to gauge given the scarcity of credible data. Until we have better data (namely enough individuals who self-identify as transgender), we will assume their numbers are likely to be as few as one-tenth of 1 percent of the adult population, and therefore, not likely to impact the overall analysis. This is a specialized topic that truly deserves greater investigation and knowledge.

Social scientists, demographers, economists and market researchers have estimated the likely dimensions of the gay, lesbian and bisexual population to be between 4 percent and 10 percent of American adults. In addition, in a nation with nearly 300 million people, the U.S. Census Bureau in 2004 estimated 220 million are adults over the age of 18.

Therefore, the most reliable guesses of the population may be as low as nine million or as high as 22 million gay, lesbian and bisexual adults. Again, this estimated range includes only adults over the age of 18. Sociologists quickly point out that the age of "coming out" and self-awareness about sexual orientation today seems to emerge at an even earlier age, possibly as young as 13 or 14. For our analysis, however, and considering the role of adult consumers, we conservatively prefer the age of 18 as the marker.

For the past five years, we have studied numerous online samples of adults while conducting gay consumer research with our polling partner, Rochester, N.Y.-based Harris Interactive. In nearly 50 such online samples conducted by Harris Interactive over those years, we were struck by the fact that the percentage of individuals who freely self-identify online as gay, lesbian, bisexual or transgender has almost always ranged between 6.5 and 7 percent of each sample. Because of stigma and fears of self-disclosure among many gays and lesbians, even these percentages may be considered conservative - however we are comfortable using 6.7 percent as a reasonable benchmark for the gay adult population today.

With 6.7 percent of adults conservatively self-identified as gay, lesbian or bisexual, that also suggests that the population may be as high as 15 million – or roughly at the median point between the lowest estimate of nine million (4 percent) and the highest estimate of 22 million (10 percent). In addition, by 2009, based on current U.S. population growth (and increased number of individuals who come out as gay, lesbian or bisexual) the size of the gay population may grow to as high as 16.4 million adults.

What is buying power anyway?
If the size of America's gay population itself seems elusive, then the concept of buying power itself also seems often misunderstood or poorly described. According to economists, simply put, buying power is another term for disposable personal income, which is defined as the total after-tax income available to an individual to spend on personal consumption, personal interest payments and savings.

Buying power therefore is simply that – the amount of money we have left over after taxes – to spend on goods and services, and to save and to pay interest on our debts (such as our home mortgages and automobiles, to name two.) Some of us may think of this simply as our take-home pay. On average nationally, roughly 85-86 percent of an individual's total earnings may be considered disposable personal income or personal buying power.

In the 2004 edition of The U.S. Gay & Lesbian Market (published by marketresearch.com) report that we co-authored with Bob Brown and Ruth Washton, when analyzing gay buying power, we chose to apply a reliable methodology that is consistent with the approach taken by the Selig Center for Economic Growth at the University of Georgia in calculating the purchasing power of other consumer segments such as Hispanics and African-Americans.

This approach uses national aggregate disposable income data that are compiled by the Bureau of Economic Analysis (BEA) of the U.S. Department of Commerce and provide the most comprehensive picture of overall purchasing power in the United States. Gay and lesbian purchasing power is appropriately calculated by allocating a proportion of aggregate disposable personal income to the gay and lesbian consumer segment.

Gay buying power today totals $610 billion and could reach $641 billion in 2006. We estimate America's gay, lesbian and bisexual buying power on the basis of the following assumptions:

• According to the latest available data from the BEA, aggregate disposable personal income for the United States was projected to total $9.1 trillion in 2005.

• Based upon the allocation of personal income across age groups shown in U.S. Census Bureau data, we also estimate that virtually this entire total (99.77 percent) is attributable to the population 18 years old and over.

• The gay and lesbian population is assumed to account for 6.7 percent of aggregate disposable personal income in the population 18 years old and over, a proportion consistent with the

percentage of gay men, lesbians and bisexuals in the population as a whole.

• Thus, the buying power of gay men and lesbians totaled an estimated $610 billion in 2005 (.067 X $9.1 trillion).

The fundamental assumption behind this estimate of gay buying power is that the gay and lesbian population essentially mirrors the adult population as a whole in terms of income generation.

However, the following factors suggest that these estimates of gay and lesbian purchasing power can be viewed as conservative, especially when applied to gay and lesbian household purchasing power.

As the U.S. Census 2000 confirms, gay couples are more likely to live in urban areas than rural areas and small towns, while gay couples living in major metropolitan areas are more likely to be white than the population as a whole in these areas. Both of these demographic characteristics generally are associated with higher average incomes.

The 2000 Census data also confirms that gay couples are less likely than married heterosexual couples to have children, and they are more likely to have both partners in the workforce. (The Census shows that 57 percent of same-sex couples have both partners working, while this is true of only 48 percent of heterosexual, married couples). These factors result in higher per capita household income, especially in the case of gay male couples.

Census data also characterizes the median household income of same-sex couples as somewhat higher than that of married couples ($60,000 vs. $57,900). However, because same-sex couples are less likely to be raising children, the per capita income of households of same-sex couples is significantly higher (21.9 percent) than that of married couples ($32,656 vs. $26,784).

The table contains buying power projections and population estimates between 2005 and 2009, and is modified and excerpted from our projections contained in The U.S. Gay and Lesbian Market 2004.

Projected Growth in Total Gay Buying Power, 2005-2009

Year	Population (thousands)	Per Capita Buying Power	Aggregate Buying Power (millions)
2009	16,414	$45,366	$744,639
2008	16,119	43,954	708,500
2007	15,831	42,580	674,091
2006	15,549	41,246	641,333
2005	15,264	39,973	610,149

Source: The U.S. Gay and Lesbian Market 2004 (Packaged Facts and Witeck-Combs Communications)

Caveats about buying power

Understanding buying power is indisputably useful for economists, business executives and public policy analysts, and for those of us who wish to calculate market potential and emerging market opportunities. With $610 billion in estimated buying power for gays, lesbians and bisexuals, it is no surprise that many Fortune 500 companies are investing more each year to tap this profitable potential.

Comparisons are invariably made, however, among different population groups to calibrate where each one stands against another. Is African-American buying power the most dynamic? Do Asian-American households have more clout per capita than Hispanic households? How do gays and lesbians stack up with the buying power of other population groups?

Before weighing this question, a warning flag must pop up. Certainly there are reliable estimates of buying power for each ethnic or minority population in the nation, according to analyses performed by the University of Georgia's Selig Center. For instance, with a population of 38 million people, African-Americans are estimated to have a combined $760 billion buying power. For 42 million Hispanics, their buying power totals $735 billion.

Keep in mind, however, that the buying power calculations for gay Americans are based only on adults over the age of 18, while ethnic and racial buying power calculations include all members of all ages within each target household. It stands to reason we can generally identify a person's ethnicity or racial composition at birth, while sexual orientation is a naturally occurring characteristic that only becomes apparent later in adult life.

It should also be obvious that gays, lesbians and bisexuals come from all walks of life, all ethnicities and all races. In short, the projected buying power for gay adults includes individuals who will be part of buying power projections for other groups as well - including African-Americans, Hispanics and Asian-Americans. It is then difficult to accurately compare gay buying power with that of other populations without mischaracterizing the relative strengths of each.

Buying power as a valuable tool

Buying power matters. Knowing how to identify, measure and apply it can be a valuable tool that reveals the full measure of economic contributions made by all Americans. Gay, lesbian, bisexual and transgender people have long participated in the U.S. economy as taxpayers, workers, investors, philanthropists, parents, patients and consumers. Their earnings, investments, savings and contributions present a strong barometer of economic vitality. With $610 billion in buying power as the current benchmark and growing to $641 billion in 2006, gay Americans will continue to be important players in the future of America's commercial potential and economic growth. | Q

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Getting to win-win

By Tim Coffey,
David Siegel
and Greg Livingston

Brands that are successful with moms and kids address the motivators of both mom and kid. There is no enduring brand that exists as a win-lose proposition in the mind of the 4i4l consumer. (4i4l, or four-eyed-four-legged consumer, is our way of referring to the partnership between moms and kids). To believe otherwise ultimately leads marketers to adopt wrong-headed approaches, such as "nag-factor" marketing from a kid-driven perspective or to believe that they are marketing a "mom-only" brand. Both of these approaches are in reality win-lose propositions. The "nag factor" mentality believes that you can be successful by creating such strong appeal to the kid that she will overwhelm mom with nagging requests, even if the product offers nothing for the mom. This is a win for the child and a loss for mom. The "mom-only" version of this believes that you can be successful by offering such a strong appeal to mom that she will force her child to consume or use the product. This is a win for mom, but a loss for the child.

How is it, you ask, that brand managers and their management constantly fall into the win-lose traps discussed above? We believe that it is because they confuse brand strategy with marketing execution. Instead of clearly defining how a brand delivers against both of its constituents, they focus only on the question of advertising and media mix. Should we advertise to moms or should we advertise to kids, or both? While this is certainly an important consideration, it is secondary to the job of defining how the brand will deliver against the needs of both moms and kids. Once this is understood, then the question of marketing mix can be addressed.

What motivates moms and kids as consumers?

To help illuminate the needs of both moms and kids we developed a model of mom and kid motivators that highlights the major motivational themes that are in play for brands that are used by kids. The mom and kid motivators model has three main components: mom motivators, kid motivators, and the influence interaction styles. This model was developed based on our collective experience across a wide range of categories, and by examining the marketing efforts of many brands that have the 4i4l consumer as their customer. We will describe each component of the model, and then discuss a successful case that

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Mom motivators

There are four major motivators for moms as they make decisions regarding kid/family products: ego, simplification, nurturing and satisfaction. Each of these basic motivators relates to and helps identify consumer insights.

• Ego. This represents a mom's need for a positive self-image. Some of the specific articulations of insights that come from this motive are:

Good mom: Moms want to be perceived as being a good parent, doing the "right" thing. The culture defines the role of motherhood, and moms are often motivated to live up to it.

Family affirmation: It is just human nature to want the affirmation and appreciation of others and moms are no exception, wanting their kids and or spouse to appreciate what they do.

Smart mom: The need to feel that they are making a good or smart decision is a strong desire among moms. They may express this as, "I like when I have figured something out that others may not have or when I have information that can help others."

Sneaky mom: A version of the smart mom driver is when moms feel like they have provided something good for their kids, but the kids didn't even know it. This is where the "you know it's nutritious, they know it's delicious" idea comes from.

Prestige: Although they might not admit it openly, "it feels good to own certain products that are more exclusive or elite" is a sentiment that often motivates a mom's behavior.

• Simplification. In our modern society, the need for simplification and convenience is unending. Some examples:

Time saving: We've often heard moms say, "I am always looking for ways to save time with chores so I have time for more important things like spending quality time with my family." The notion of saving time for more important things is one of the key values of today's Gen X mom. The Baby Boomer mom might have been more likely to express saving time as a means to accomplishing more.

Ease: There are a number of ways in which this motive is expressed. The first is to make it easier to do something that is valued, such as preparing a fine meal. There is also the proposition of making certain interactions easier, as in, "When I know what my kids want, it makes my life easier."

Reduction of physical labor or unpleasantness: Drudgery, which is constantly being redefined, is forever a point of opportunity. By understanding each and every moment of unpleasantness in the consumer experience, we can uncover new ways to delight moms.

Elimination of family conflict: There are certain situations that seem to cause conflict between family members. Moms state that they wish there was a way to reduce or eliminate conflict, saying, "I don't want to have to fight to get my kids to use/consume something I buy."

Efficacy/durability: "I don't have time for things that don't work or break down" is the way moms view products today. Many will pay for high quality.

Trust/confidence: Trust in brands and advertising is at an all-time low, so brands that can garner today's moms' trust are rare and powerful. She wants to be able to trust brands when she doesn't have all the information or expertise, or when the risk of a wrong decision is costly.

Reduction of choices or indecision: Today's marketplace is overflowing with choices, so sometimes moms just need someone or something to simplify the decisions, to be a partner in the process.

• Nurturing. A mom's need to nurture begins early, arguably it began when she was a child. Insights that are related to nurturing are as follows:

Child development - mental and physical: More than ever before, moms are acutely tuned into the objective of helping their children progress both mentally and physically.

Safety/well-being: The world we live in today has created a stronger focus by moms on protecting their children from harm.

Sustenance/good for health of child: Moms want to be sure that their children are getting the nutrition they

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need to grow and be healthy.

Provides child self-esteem/confidence: One of the emerging values of today's moms is the desire to cultivate their children's confidence, self-esteem, and future success.

• Satisfaction. Arguably, the most powerful motive for moms is to make their children happy. There are two insight areas that exist here, as follows:

Child enjoyment: Talk to any mom and you'll hear, "Nothing makes me happier than to see a smile on my child's face." Of course this is a natural and normal expression of a parent's love for her child, and is typically offered with appropriate parent responsibility. We've identified a more permissive mom segment that seems to respond to this motive more than others based on an underlying value of wanting to provide more to their children than they had as a child.

Child popularity: Every mom remembers the trials and tribulations of fitting in as a child, which makes them sensitive to whether their children fit in. We've often heard "I don't want them to be left out or teased."

Kid motivators

Just as there are four major motivational areas for moms, we have found four major areas for kids, which are: fun, power, belonging and freedom. In our last book, *The Great Tween Buying Machine*, we explained these areas and broke them down into a number of different centrics. Here, we simplify and modify them somewhat for the 4i4l consumer model.

• Fun. It has been said many times that the work of kids is to have fun, and of course this is true. Nearly any kid product includes a healthy helping of fun. Truth is, though, to be an enduring brand, marketers must deliver more than just fun. Breaking it down from a motivational perspective, we look at fun as follows:

Sensation: Kids enjoy pleasurable sensory experiences, such as bright colors, scents, sour tastes or a rush of excitement or thrill. The desire for sensory experience grows and evolves as kids grow into tweens and teens. One of the most interesting examples of this motive is the popularity of strongly fragranced shampoos and cleaning products that most certainly appeal to tweens and teens.

Interactivity: They will twist and turn, and stretch and stir, dip and dunk, deriving enjoyment from the action alone. Many adults cannot understand the appeal of a product such as Lunchables Pizza that kids eat with cold bread, cold sauce and cold cheese. This is not a great pizza experience, but it offers the opportunity to build it the way you want it, and this seems to be its own reward.

Amusement: Sometimes kids just want to be silly or laugh. Products that facilitate laughter and silliness can have a place in their hearts.

Satiety: Before lunch or after school, kids' fast-revving engines begin to thirst for fuel. They'll say, "I crave something to feed my hunger, satisfy my sweet tooth, re-energize me."

Imagination/creativity: Kids' imaginations are their vehicles, which can transport them to new and exotic

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places to meet amazing people. Many products are based on providing the portal to this imaginary world, including such perennial favorites as Barbie and GI Joe.

• Power. For the most part, kids live in a world where they don't have a lot of power or control over their circumstances, so it is not surprising that brands that offer this can be very motivating. Some of the particular insights around the power motive are:

Control: They say, "I want to be able to have influence on my world. I want my voice to be heard." Brands such as Nickelodeon have done a good job of giving kids the sense of control with such programs as the Kids' Choice Awards. Others build in elements of customization into their products.

Mastery: Kids are driven to master new skills, especially as they grow into the tween years. This desire is reinforced in school from early on. We've heard them offer, "I feel good when I have mastered a game or achieved a goal." This is one of the key drivers behind video games.

• Belonging. As discussed earlier, the need for belonging begins very early, with young children needing a physical and emotional connection to their parents. As they grow into tweens and beyond, the need for belonging to parents is replaced by a similar need to belong to their group of peers.

Nurturing: There is an interesting recent example of products whose appeal is largely based on the desire of the child to nurture, such as Neopets. This Web site offers kids and tweens the ability to adopt and care for virtual fantasy pets and characters. Of course, a little girl's first baby doll has always filled this need.

Popularity: Kids want to be accepted by friends. The desire to fit in is strong, especially among tweens. The notion of prestige is also related to this motive. Certain brands can be said to have "badge value" which is simply saying that the user will gain some social currency or prestige just by using or owning such a brand.

Identity: Closely related to popularity, kids, tweens and teens seek to establish their identity. This can be in the form of affinity with an activity, such as sports, or other established and recognized entities. Sometimes it is with a peer group. We've seen many tweens who claim their fashion as expressing their identity, which happens to be almost precisely the same as their friends.

• Freedom. The desire for freedom shows itself in different ways as kids grow from young children into tweens and, finally into independent teens. The constellation of insights related to the freedom motive are as follows:

Exploration: Young children learn through exploration of their environment, touching, tasting and manipulating anything that happens to capture their attention. You can probably describe what licking the floor would taste like. Why do you think that is? Exploration never really ceases, but rather it expands to more adventurous and even dangerous places as kids grow into teens. Successful brands leveraging this motive find ways to offer safe exploration that is appropriate to the age of the child.

Empowerment: Young kids want to get bigger. Tweens want to do what teens do. Teens want to live on their own away from their parents. Brands and products can be based on delivering the empowerment to independence. A case in point is Kraft's Easy Mac, which is designed to allow tweens the ability to make their own afternoon snack.

The Lunchables story

Now that we have delved into the various dimensions of motivation for both moms and kids, we illustrate how brands can put it all together to get to win-win propositions. Our case is Lunchables from Oscar Mayer. If you are not familiar with this brand, it is a lunch kit that offers kids some of their favorite foods in a handy tray, and includes a main entrée, drink and dessert. For kids, the brand delivers on multiple motivators: the fun/sensory enjoyment of food they like, the fun/interactivity of building your own food, and the belonging/popularity of a brand that has "badge value" in the lunch room.

The brand has always been intensely popular with kids under the age of 10, but the same cannot be said for moms. Many moms would describe the brand as too expensive, not very healthy and not very appetizing. Despite this, the brand has sales approaching $1 billion annually. Why is this? Well, the brand has worked hard to achieve win-win by providing moms with a positioning that says roughly, "Your kid works hard at school, doesn't he deserve a treat like Lunchables, that you know will make him happy?" They go on to say, "Your kid will love you for it."

The first is an example of the satisfaction/child enjoyment motive, with the second well representing ego/family affirmation. By re-framing the issue from one of price-value and nutrition to one of a well-deserved treat, moms are able to rationalize the product and take advantage of its convenience without guilt (simplification). So, as is clear from this case, even brands that appear to be driven by kid appeal can have equally strong mom motives at work. | Q

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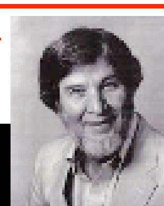

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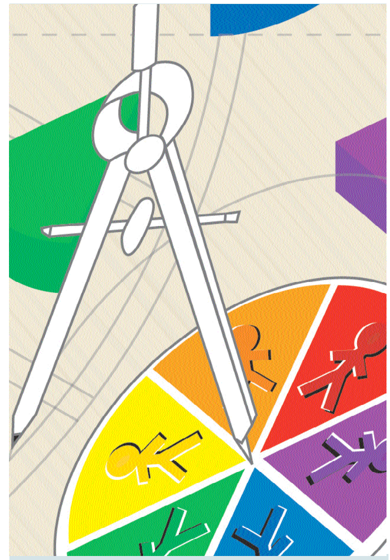
Don't count on it

The reality of Baby Boomer brand loyalty

By Heather Stern



We've all heard the Boomer/50+ statistics before: they number 78 million and they're in control of much of the nation's wealth, spending approximately $2 trillion a year. In case we happened to forget, recent covers of *BusinessWeek* and *Newsweek* were there to remind us: "The Boomers are coming, the Boomers are coming!"

Despite these statistics, many Fortune 500 companies aren't tailoring marketing, advertising and product development efforts for this dynamic, lucrative group of consumers. What are the underlying reasons for this industry-wide trend and how can research help facilitate a shift in perception and commitment to this ever-important segment?

Late in 2005, AARP Services and The Kantar Group formed Focalyst, a joint venture dedicated to helping companies create products, services and marketing strategies based on the multidimensional needs of Boomers and 50+ consumers rather than simply on age.

Focalyst's inaugural research initiative was to uncover the underlying beliefs held by marketers about the "aging population" and conduct a study that would help turn those perceptions upside down. The first issue was addressed through an executive survey conducted among senior brand and marketing executives at Fortune 500 firms in the retail, automotive, apparel, consumer packaged goods, food/beverage and pharmaceutical industries. The second was accomplished through in-depth analysis of AARP brand loyalty research which was carried out by telephone from October 28 to November 6, 2005, among a nationally representative sample of consumers across age groups, from 18-80+.

Never say never

In the executive survey, Focalyst found that targeting the Boomer and 50+ segment didn't rank among the 10 top priorities in almost half of the companies surveyed. In fact, while interviewees were aware of the sheer size and opportunity this market represented, over 65 percent had no specific plans to address this audience, generally based on the belief that this population is reluctant to switch

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With Boomers, the time is now

By Anne Wall

Editor's note: Anne Wall is managing director of BoomerEyes, a division of Chicago-based C&R Research. She can be reached at 312-828-9200 or annew@crresearch.com.

Boomers are now in a stage in their family lives where many of them are no longer raising children, and they are also at a point in their careers where many are no longer feeling the pressure to climb the ladder. So they are starting to focus their thoughts and their energies back on themselves.

What does that mean for marketers? Boomers have more time and money for: traveling, leisure, dining out, fitness, starting a small business, continuing education, housing, grandparenting and using the Internet, to name a few. In fact Boomers as a group are estimated to spend upwards of $2 trillion a year. According to the U.S. Bureau of Labor Statistics' annual Consumer Expenditures survey Boomers 45-54 years old spend $50,101 annually on consumer goods and services, compared to only $40,525 spent by young adults 25-34.

So why aren't more marketers targeting Boomers? A common misperception is that consumers over 40 are brand-loyal and unlikely to change. Not true. In a survey conducted by BoomerEyes among 1,040 Boomers (those born between 1946 and 1964), fully 87 percent did NOT agree that "(they) always stick to what you know and trust and never try new products." Furthermore, 75 percent agreed that "(they) like to try new things." Considering that their lives have been filled with change, this is not surprising. None of the technology used in the workplace today was available when Boomers were kids - no computers, no e-mail, no Internet, no cell phones. Their personal lives have also been filled with change, from black-and-white TVs to TiVo and DVRs; from ovens and stoves to microwaves; from TV dinners to today's freshly-prepared carryout meals. In fact, as employees and business leaders, many of today's Boomers have been the instigators of much of the change and the creators of many of the new products.

While we will be the first to tell you that the 78 million Boomers do not comprise a single market segment, but rather are a number of segments, we have developed several guidelines for targeting Boomers:

- Boomers are not indiscriminate spenders. Their days of acquiring "stuff" for the sake of acquisition are over. They are now buying to enhance their life or to create an experience for themselves. Therefore a marketer's message needs to discuss life benefits, not features. What will your product do to enhance their life in a meaningful way? Or, how will it fit into their current lifestyle?
- Boomers are not black-and-white thinkers. Time and experience have given them the ability to see many shades of gray. So, messages that state absolutes - the best, the only, the greatest - often fall on deaf ears.
- Boomers are positive, active people. Many believe the best years of their life are yet to come. They seek messages that are intelligent and that affirm the positive.
- Boomers are not interested in their age per se. Calling out their age

or experiment with new brands.

As one marketer of a leading apparel company said, "When someone turns 50, he will never switch brands." Another marketer, from a major food manufacturer admitted, "When we do media targeting, we explicitly exclude the 50+ because we feel like we will get them anyway."

Get them anyway? "In today's consumer marketplace of media fragmentation and product proliferation, assuming that any consumer, regardless of age, is a 'done deal' is a dangerous thing," says Evan Neufeld, senior analyst at Focalyst. "Those brands that don't move forward and evolve will find themselves being left behind."

Brand loyalty: not what it used to be

Contrary to popular perceptions, Boomers and 50+ consumers are no more brand-loyal than those in the 18-41 cohort. Focalyst analysis of recent AARP data from 1,547 adults ages 18 and older (of which 512 of the respondents were 18-41 years of age, 518 the respondents were 42-59 years of age and 517 adults were age 60 or older) found three out of five consumers displayed a high degree of brand volatility across cohorts, with no marked decrease among consumers over 42 years of age, the youngest official Boomers.

For example, 57 percent of respondents ages 42-59 were likely to experiment with different brands, with more than nine in 10 agreeing that value is more important than brand in their purchases. Additionally, 72 percent of consumers in the same bracket say they always look for a new or improved product that might be better than what they currently use, the same percentage of consumers within the 18-41 bracket. And as for the 60+ consumer, who many believe are most set in their preferences, the survey revealed they are even more likely than younger adults (62 percent for 18-41 vs. 65 percent for 60+) to agree that "in today's marketplace, it doesn't pay to be loyal to one brand."

"The conventional wisdom that drives marketing lethargy is grounded in outdated perceptions of aging," says Mike Irwin, president of Focalyst. "Marketers who continue to assume that consumers' loyalty and affinity to products and services remains fixed with age will lose market share to those who seek out and directly speak to them."

The pursuit of value

Focalyst research showed that, in general, consumer attitudes about brand loyalty are remarkably consistent across age groups. Ninety percent of consumers overall spoke of the primacy of "value in a product as being more important than brand." When evaluating product loyalty by brand, research once again showed little variation based on age. Of the 10 product groups

Figure 1: Percent of Single Brand Loyalty, by Key Categories

Cohort	Airline	Athletics	Banking Services	Cars	Cosmetics	Credit Cards	Prepared Foods	TV	Computers	Music & Video Players
18-41	○	○	●	[illegible]	◑	◑	○	◑	◑	◑
42-59	◑	○	●	◑	◑	◑	○	◑	◑	○
60+	◑	○	●	●	◑	◑	○	◑	◑	○

○ Low (<20%) ◑ Medium (20%<50%) ● High (>50%)

with messages such as "now that you're 50," are likely to turn Boomers off for two key reasons. First, they tend to think of themselves as being 10 to 15 years younger than they actually are. And second, they think of what they want to do and accomplish and experience, not how old they are. Whenever possible, speak to them about their interests and their passions not their age.

• Boomers are not all couples. They live alone, with other adults, with their aging parents, or with their adult children. Their households take a variety of different shapes. So too should the visuals in advertising to them. Very often ads targeted to Boomers show a smiling couple - this is only a minority of Boomers.

• Boomers are real people. They don't all look like models, nor do they want to. They embrace authentic advertising that shows the imperfections brought on by age - gray hair, a few well-earned wrinkles, figures that aren't rail-thin.

• Boomers appreciate intelligent humor. Many Boomers have experienced some very serious situations in life - job loss, illness, death - and have gotten through, in part, by relying on humor. They appreciate humor in ads.

Four segments

There are many meaningful ways to segment Boomers. Based on our attitudinal segmentation of the marketplace, the BoomerEyes Lifestyle and Psychographic Segmentation Study, we have identified four key segments. These segments are defined by their attitudes and behaviors rather than their age:

• The Looking for Balance Boomers are active, engaged adults who are likely to still be raising their children. They have many demands on their time. As a result, they are very interested in convenience and efficiency.

• The At Ease Boomers are a very home-centric, family-oriented group. A number of them have already retired, and they are quite content with their lifestyle.

• The Overwhelmed Boomers are generally people who have some kind of serious issue to grapple with, be it unemployment, illness or an ailing elderly parent. These Boomers are often very budget-conscious and not highly energized.

• The Confident and Living Well Boomers tend to be empty-nesters or those who never had children. They have plenty of money and a strong interest in an active, engaging lifestyle. They are consumers of many luxury and upscale products, as well as being interested in adventure.

While our study revealed this segmentation scheme, depending on your product or service, you might want to segment Boomers on other criteria such as lifestage or attitudes toward your product category or certain behaviors. We strongly discourage segmenting solely on age. With Boomers, age alone is not enough.

Lucrative market

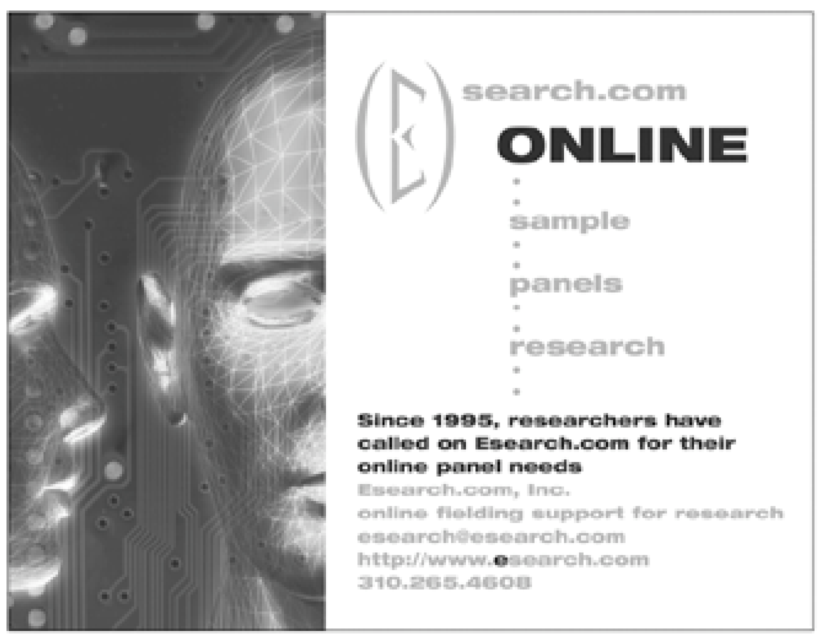
Boomers are an exciting, potentially lucrative market for many companies. They are a generation that has approached each stage of life quite differently from the generation before them. And, they will continue to do so. Even now, as the oldest of them is still five years away from retirement age, they are redefining retirement. Many Boomers do not intend to retire. Rather, they expect to launch second careers, downshift, start a business, volunteer, or mentor. In other words, they intend to remain quite active and quite engaged. So too will they remain active and engaged consumers. The time for marketers to take notice is now. | Q

reviewed, seven had nearly identical levels of single-product loyalty across age groups (the exceptions being cars, music and video players, and airlines). Higher-cost and -consideration products and services, while having marginally higher "positive" brand rankings compared to more consumable categories, have low "brand negatives." In higher-cost and -consideration categories, the percentage of consumers who think that being brand loyal makes little difference is very low. These negatives show slight variation by age and exhibit similar ranges within each category. One of every four consumers in all major product categories will be challenging to reach.

Advertise with care

Thus far, the brand loyalty research showed very similar results among age groups. That is to say, contrary to popular mythology in the marketing world, mid-life and older adults are no more brand loyal to most product categories than are younger adults. However, they responded very differently to advertising than the younger population. To get their business, it is critical to address them on their own terms. In fact, the Boomer and 50+ populations found advertising more insulting or condescending compared to younger cohorts (51 percent vs. 37 percent) with nearly half saying advertising is not sensitive to their age group. Additionally, 58 percent of the 42-59 age group (and 74 percent of 60+) agreed that today's advertising was too "out there" to resonate with them (vs. 39 percent of 18-41 market). While only about half of consumers (across age groups) view "liking ads" as a key factor in driving them toward purchase, the blowback of negative ad execution is deadly, with 80 percent of Boomers and 75 percent of those older than Boomers saying they are less likely to consider a product if they find the ads offensive.

"Our study shows that 51 percent



of Boomers/50+ consumers find advertising insulting or condescending," says Neufeld. "The price of entry for brands courting the Boomer/50+ market is to avoid the uninformed perceptions and images that will ultimately turn them off."

Advertisers who have Boomers and 50+ users and want to keep them, or those who don't and covet them, must consider a more synergistic advertising execution and placement strategy. First, they should immediately abandon the notion that they have to keep a wide distance between the 18-41 and the 42+ age groups. Such ideas doom marketers to labor in realms where marketing is dictated by many of the old, untrue and ultimately ineffective assumptions we have outlined. Marketers must better align creative executions to appeal to both groups whenever possible, operating more in parallel and focusing on the use of tactics that are well-received by all cohorts (such as humor and conveying energy/excitement in ads) and avoiding those that have more mixed results (edgy creative, for example). This in turn should allow for the development of ads that keep both groups engaged while offending neither.

While some advertisers believe that targeting the Boomer generation may alienate their core market, Focalyst research shows that ads and other brand experiences that are specific to Boomers and 50+ consumers need not turn off other core demographics.

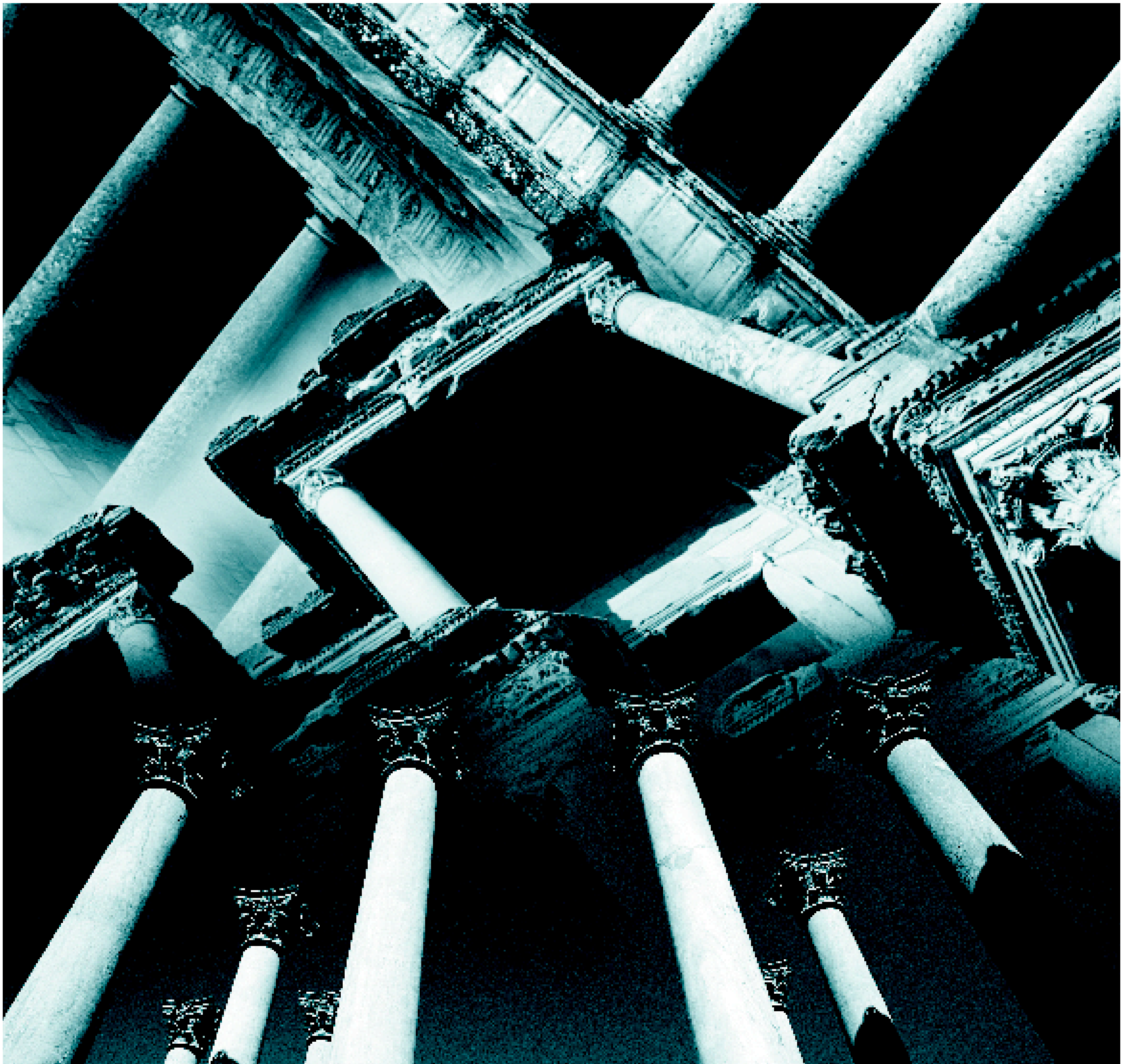
For those exclusively targeting the Boomers, Focalyst suggests a few rules of the road:

• The power of recommendations - 82 percent of consumers 42-59 said they would try an unfamiliar brand if it were recommended by someone they trust (73 percent of 60+ would do so as well).

• Radio is less effective - only 17 percent of consumers 42+ are influenced in their purchasing decisions by ads on the radio. The strongest media for influencing a purchase are newspapers, television and the Internet, especially for product research.

Market to values and lifestyles

So is there a general "Boomer attitude" towards brands? "The truth is, there is no such thing as one Baby Boomer sentiment, attitude or behavior," Irwin says. "This is a group of consumers who in many ways defy definition. They are highly varied and therefore far from monolithic. The answer is not to market to age, but to market to values and lifestyles. Companies that have a deep understanding of the needs triggered by values and lifestyles and highlight them in their marketing and advertising will show a significant bump in sales from older consumers without alienating the younger buyer." IQ



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Hard data on software

A report on the 2005 Confirmit Annual MR Software Survey

By Tim Macer

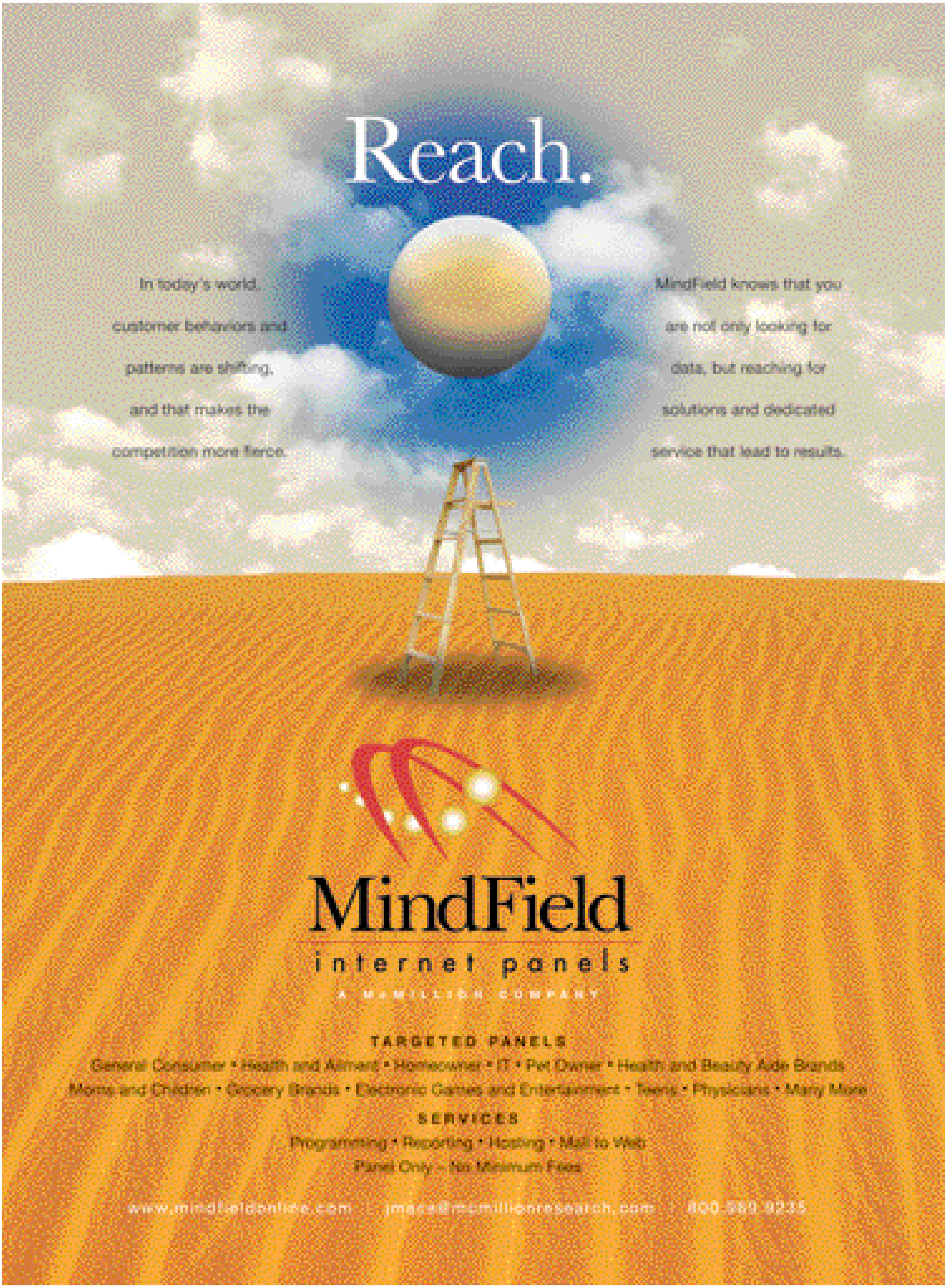
Almost nine out of 10 research companies in North America today use Web survey software, with the rest of the world only a few percentage points behind this now. Around 12 percent of research companies have written their own data collection software, but a staggering 74 percent have developed their own panel management software rather than use an off-the-shelf solution. And across the industry, both by size of company and around the globe, practices vary widely with regard to mixed-mode research, approaches to electronic data delivery and traditional crosstab reporting, and the more mundane activities of editing and cleaning data.

These and more are among the findings of the 2005 Confirmit Annual MR Software Survey which we publish here in *Quirk's* for the first time. Norway-based research software maker Future Information Research Management, or FIRM, who commission and sponsor this research, have provided their kind permission to present these results here. The commentary and interpretation, however, is editorially independent of the sponsor.

The survey is based on an invited sample of senior decision makers at research companies around the world. From an initial sample of 800, 212 participated, with 64 in North America, 117 in Europe and 31 in Asia-Pacific, which is a reflection of the differential response rates in each region. Despite several polite reminders, it seems researchers are becoming as resistant to survey invitations as the rest of the world.

Companies of all sizes were well represented in the achieved sample, with 53 with revenues of under $1 million (small companies in our analysis) and 44 in our large category with annual revenues exceeding $24 million. Neither was the sample dominated by IT specialists, as we were keen to represent the views of both research and operational decision makers. Thirty-nine percent of the sample was at board or senior vice president level, and 48 percent considered themselves to have primarily a research responsibility, against 18 percent IT or DP and 34 percent business or operational. The survey was carried

Editor's note: Tim Macer, managing director of U.K.-based consulting firm meaning ltd., writes as an independent software analyst and advisor. He can be reached at tim.macer@meaning.uk.com.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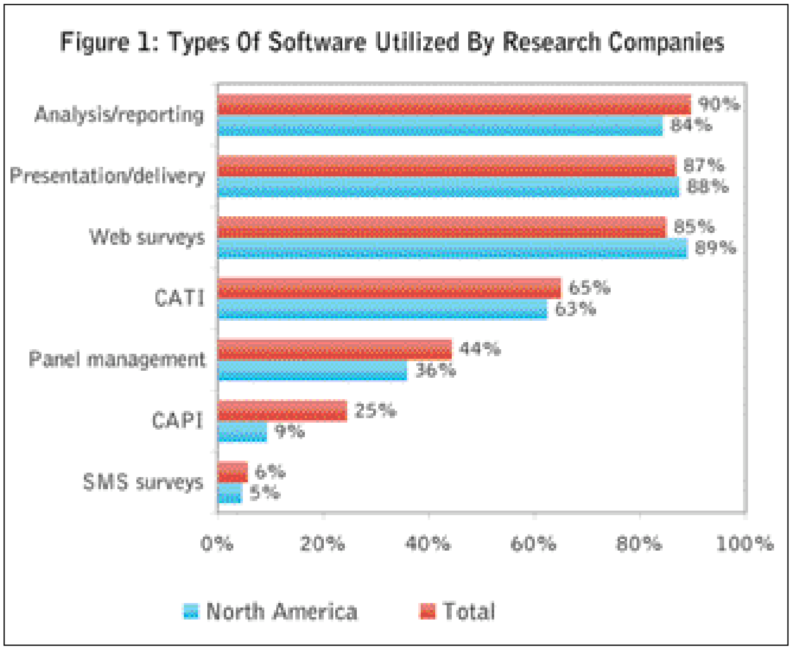

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Types of software utilized by research companies

Three categories of specialist research software have achieved virtual ubiquity in research companies worldwide: software for online surveys, for analysis, and for presentation or publishing of results. While two in every three research companies worldwide may have the capability to do their CATI research, only one in four can provide a CAPI service. However, nine research providers out of every 10 today have the means to field Web surveys.

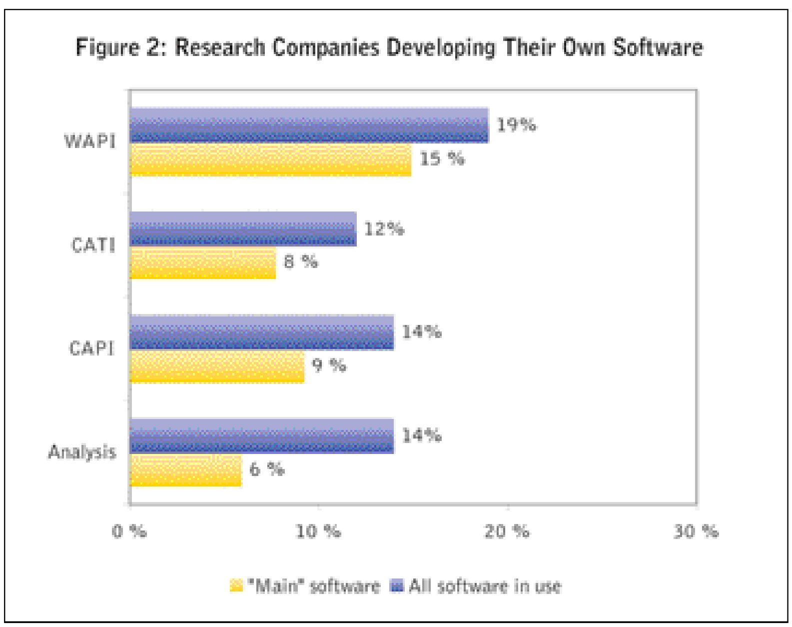
North America's research firms still have the edge over Europe on Web survey capabilities, at 89 percent versus 81 percent, but companies in Asia-Pacific are neck-and-neck with North America, at 90 percent. Asia-Pacific also leads in the prevalence of panel management software, where 65 percent of companies have acquired or built these tools, as opposed to 44 percent in Europe and just 36 percent in North America.

CAPI is well established as an important channel to respondents in both Europe, where 32 percent of research companies have invested in appropriate technology for the task, and Asia-Pacific, where 29 percent are similarly equipped. This may come as a surprise to researchers in North America, where geography and custom conspire to keep CAPI as the method that failed to take off in the 1990s. A mere 9 percent of research companies in North America today seem to offer any CAPI capabilities.

SMS instant text messaging on cellular phones, surely the most restrictive of all new interviewing modes, is starting to put in an appearance in a few research companies worldwide (4 percent in North America and 5 percent in Europe), though it seems to be more than twice as popular in Asia-Pacific, where 12 percent of the companies surveyed have the software to engage respondents' thumbs in text surveys.

Developing their own

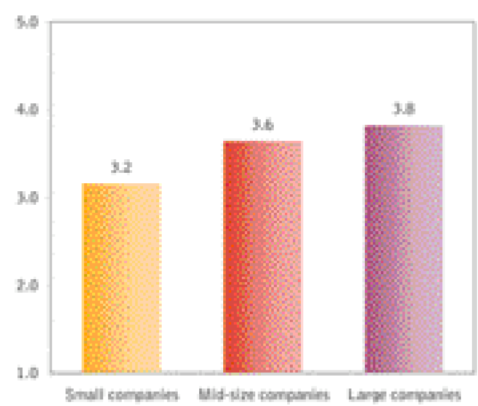
Given the widespread availability of mature, well-designed and well-maintained software for every research application imaginable, it is perhaps surprising to see the extent to which research companies have developed their own solutions in-house. Many companies use more than one software package for the same task, so we asked first about the origin of all the software they use in each of the four categories, then, where more than one solution was in use, we asked them to nominate which was the "main" package



Own-Developed Software as the Main System Used, by Size of Company

	Small companies	Mid-sized companies	Large companies
WAPI	27 percent	9 percent	13 percent
CATI	14 percent	5 percent	6 percent
CAPI	20 percent	11 percent	6 percent
Analysis	10 percent	4 percent	5 percent

Figure 3: Importance of Mixed-Mode Capabilities In Software
(five-point scale from unimportant [1] to essential [5])



used for each task.

From Figure 2 we can see that the own-grown solution does not always become the software of choice, which implies that software is often developed in-house to supplement shortcomings in the mainstream bought-in packages. This is particularly the case with analysis software, where own-grown tools are relatively common, but seem to be used alongside other tools most often.

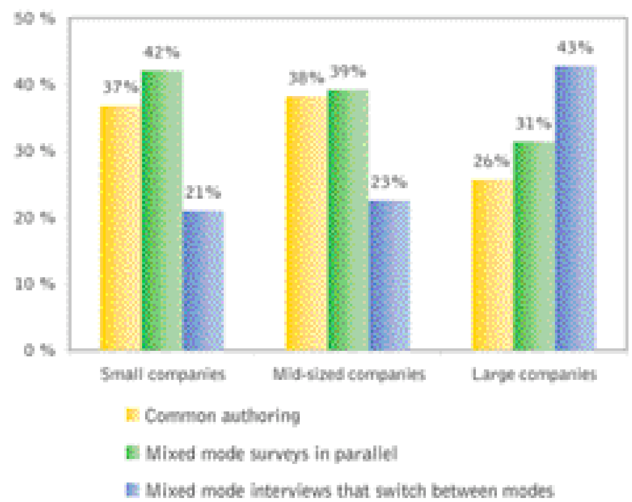
Web survey (WAPI) software is the most popular candidate for own-grown solutions, with 19 percent of companies developing their own software, and 15 percent adopting their own-grown solution as their main package. This equates to more than three in four who had the option of an own-grown tool. Given the resources and expertise that are required to develop and maintain software, and both the time and risk that this represents, it is even more puzzling that the survey has identified those most likely to be collecting surveys or analyzing results using self-built tools to be smaller firms - something that was replicated across all four categories of software.

Mixed-mode capabilities

Opinions remain divided on the importance of mixed-mode research, and the need for software to provide support for combinations of CATI, WAPI and possibly CAPI within the same package. The question asked was, "If you were choosing new software, or reviewing your current solution, how much importance would you place on the tool's ability to mix and combine different data collection modes?" with a five-point scale of answers from unimportant (1) to essential (5).

Overall, 53 percent of the companies surveyed rated such support at the top end of the scale (essential or very important) and 29 percent settled for the midpoint (moderately important) while only 14 percent considered it to be either fairly unimportant or unimportant. However, a significant split emerges at the top end of the scale, with 37 percent of large firms considering mixed-mode functionality to be essential,

Figure 4: Level of Mixed-Mode Support



against 19 percent of mid-sized and a slender 6 percent of small companies.

This is reflected, in more moderate degrees, in the average scores derived from the five-point rating scale, shown in Figure 3, with unimportant scored as 1 and essential as 5.

Mixed-mode support

What is meant by mixed-mode software varies widely from one user to the next, so we also asked respondents to rate where, on a spectrum of capabilities, they considered their needs to fall in the ability to mix modes. This ranged from "common authoring" - simply using the same authoring tool to prepare surveys each designed and administered in one mode alone (e.g., Web-only or CATI-only) through "mixed modes in parallel," where one survey instrument will be administered in two or more modes, but only one for any given interview, up to the most technically challenging category of mixed-mode surveys where interviews may switch to and fro between modes as demanded by the script or by the interviewer or respondent.

As we saw with the importance rating for mixed-mode support, the level of sophistication required divides along company size lines, with small and mid-sized companies having broadly similar needs. A significantly different set of needs is revealed among the large firms, 43 percent of whom see complex mode-switching surveys as the goal, against 23 percent of mid-sized and 21 percent of smaller firms.

Despite this, the underlying pattern is one of divided opinions about whether mixed-mode should be used to allow simultaneous interviewing across different channels in one survey, or simply to streamline production of surveys each destined for a different but single-mode treatment. This probably reflects the widely voiced though not always well-founded concerns in the industry about the perils of drawing comparisons from research data that derive from fundamentally different interviewing methods.

Panel software

One neglected area of research software development continues to be the provision of tools to manage online or offline panels. In Europe and also in Asia-Pacific, panels are assuming an even greater importance in enabling online research than they have in North America, and there is currently an unprecedented level of activity worldwide in building panels of every complexion and specialty in order to deliver the promise of high-speed, high-quality research-on-demand.

The support offered for panel management in the plethora of Web survey tools available on the open market is far from keeping up with demand, and this is clearly shown in this survey in the extent to which research companies are taking matters in hand for them-

Figure 5: Type of Panel Software Used

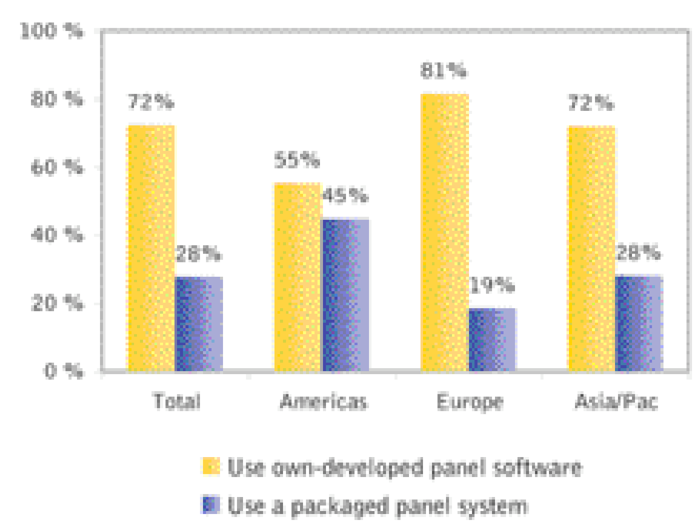
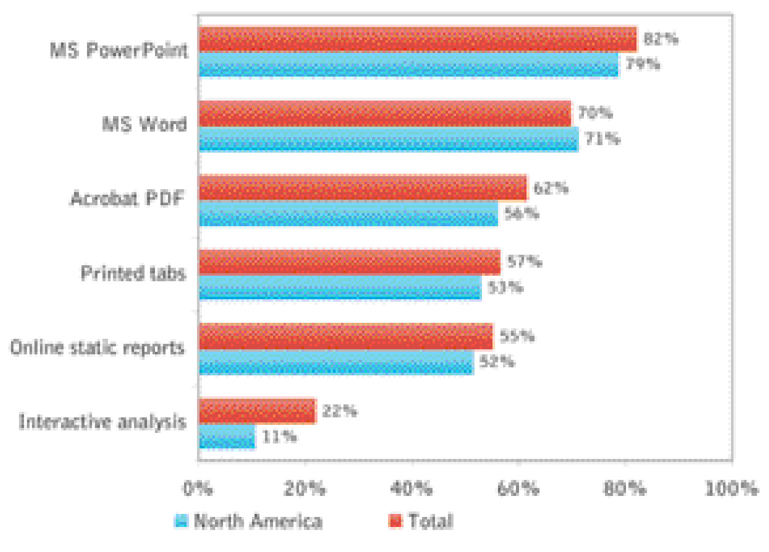


Figure 6: Report Delivery Formats Used



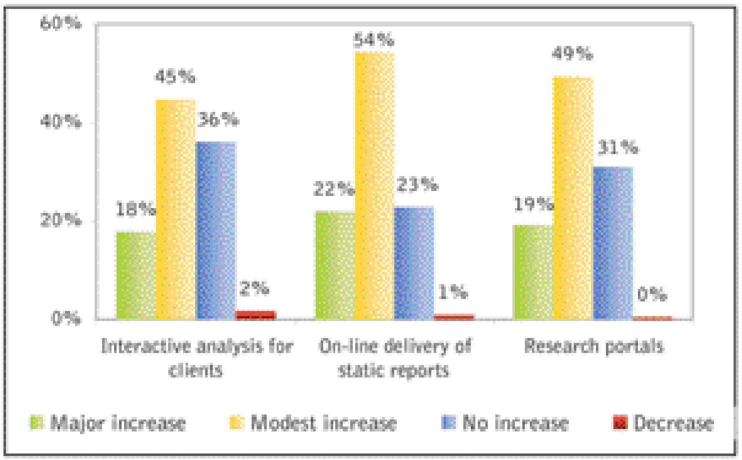
selves. While around one in 10 companies may be developing their own software for the classic research tasks of CATI, CAPI or data analysis, as we have already seen, and 15 percent – still a minority – have felt it necessary to build their own Web survey tools, that situation is turned on its head with panel management software. Even in North America, the split is 55/45 for own-grown panel software as opposed to bought-in. Elsewhere, in the areas where the demand is greatest, the gulf widens considerably. Seventy-two percent of companies in Asia-Pacific and 81 percent in Europe are going through the effort of building and maintaining their own tools rather than use what is provided.

Report delivery formats

We devoted several questions in the survey to the area of results presentation and delivery to end clients. This is a major growth area being led both by client demand and technological innovation. Though our survey did not attempt to capture figures on the frequency of use of each method, or the volumes involved, our introductory question in this section was: "In which formats are you required to deliver your reports and research results?"

Not surprisingly, Word and PowerPoint dominate as delivery methods (82 percent PowerPoint and 70 percent Word) as these are tools which both research compa-

Figure 7: Predicted Changes in Research Delivery Modes To Clients



nies and clients are likely to have on their PCs and use every day.

Around half the sample are still delivering printed tables (57 percent worldwide, 53 percent in North America), but nearly the same amount (62 percent worldwide, 56 percent in North America), are using Acrobat PDF to deliver reports and tables: usually the same format but without the paper. Encouragingly, from a technological point of view, the figure for online static reports and tables hovers just a couple of percentage points behind printed tabs (55 percent worldwide, 52 percent in North America).

Providing clients with interactive analysis, either on the desktop or via a Web portal, is still very much a minority undertaking, with only 22 percent worldwide delivering in this format, and as few as 11 percent in North America.

Changes in research delivery modes to clients

Our subsequent questions focused on electronic delivery using specialist research software, rather than standard office automation products. We asked participants the extent to which they considered demand for each delivery method would increase (or decrease) over the coming 12 months. Demand appears to be strongest for online delivery of static reports, with 76 percent overall seeing some increase in demand, and 22 percent seeing a strong demand. Research portals are also considered fertile for growth by research companies, with 68 percent predicting some increase in demand, and almost one in five (19 percent) predicting a major increase in use.

Demand appears slightly softer for interactive analysis for clients, at 63 percent overall for any increase, but with 18 percent forecasting a major increase in demand. Across all three areas, only a small handful in the sample consider that demand for electronic delivery will diminish, the rest predicting that it will remain the same.

Whither the bulk crosstab report?

Researchers are convinced that many clients never look at them, but clients are often suspicious that their agency is short-changing them when they suggest phasing out the deck of tables. Judging by the response to our question on the future of the bulk crosstab report, it looks as if it will take a while for the industry to be weaned off the blocks of everything-by-everything crosstabs. The actual question asked was, "When considering analysis and reporting tools for the future, how important is it that these should be able to produce volumes of crosstabular reports?"

Overall, 55 percent considered this an essential requirement. Importance relates closely to the size of the research company, with smaller companies most likely to consider crosstabs essential (58 percent), against 47 percent of large companies.

It is still only a tiny, brave minority who see no future for bulk crosstabs, and these are more likely to be found in large companies (7 percent) as opposed to small (4 percent) or mid-sized companies (2 percent). However, the same trend

Figure 8: The Future of the Bulk Crosstab Report

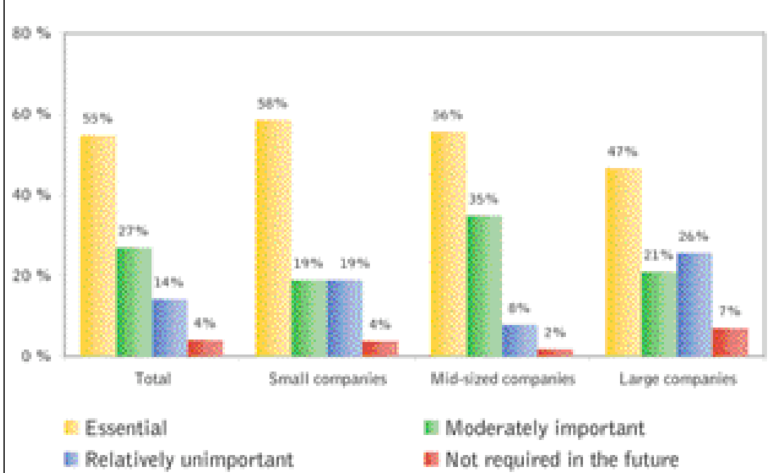


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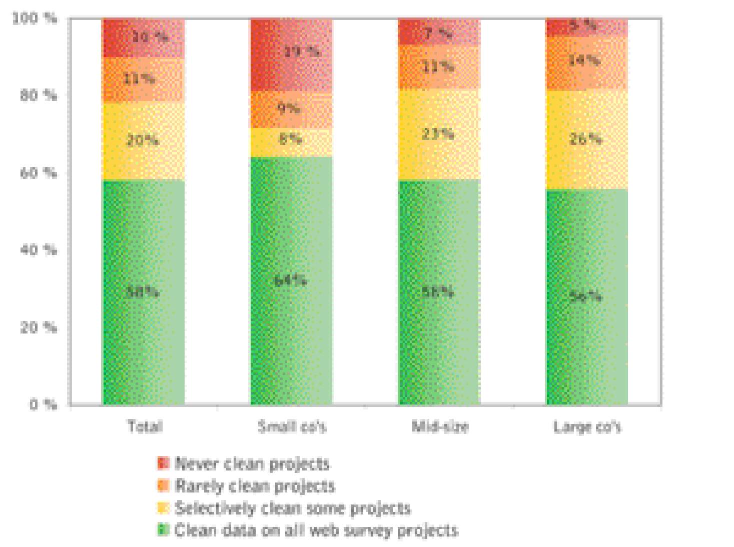
Figure 9: Cleaning of Online Research Data



applies to those viewing it as relatively unimportant, which stands at a sizeable 26 percent in large companies, followed by 19 percent in small companies and only 8 percent in mid-sized companies. It seems the opinion-formers here are to be found among the biggest and the smallest research companies.

Unusually, there was very little difference between global regions in expectation here, with Europe and America closely mirroring the overall picture.

Cleaning online data

Our next two questions focused on the practice of editing and cleaning data. Software suppliers are often fulsome in praising their software's benefits in delivering increased accuracy, both by avoiding a separate data entry step and through enforcing logical conditions and validation on screen. The unwary can interpret this to mean that editing and cleaning of data from WAPI has become superfluous.

In our first question, we asked companies who do online research (almost all companies in the sample) the extent to which they edited and cleaned data. It appears that the world is divided roughly 80/20 in favor of cleaning or taking what comes, though only one in 10 admit to never cleaning their data. Opinions seem to differ by company size, with mid-size and large companies engaging in very similar practices: around one-half cleaning all projects, and one-quarter performing selective cleaning.

Small companies seem to take a more all-or-nothing approach, with 64 percent - the highest proportion of any group - routinely cleaning all projects, and 19 percent, also a much higher proportion than other groups, leaving their data untouched, or 28 percent if you include those who rarely clean data too.

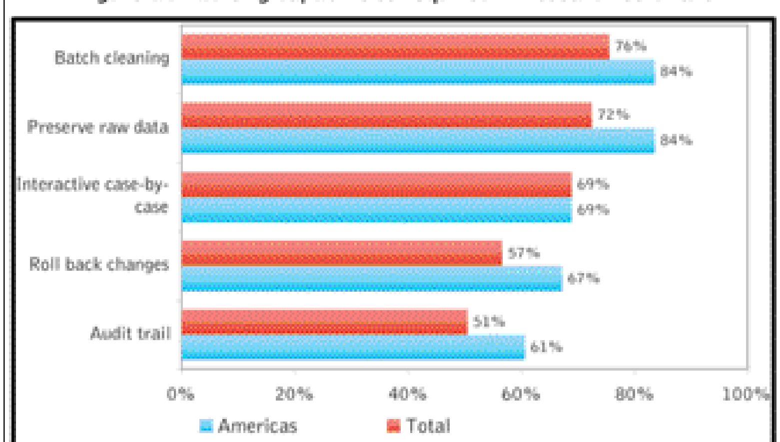
There were some interesting global variations. North Americans are more likely to clean all their projects (69 percent), with only 14 percent rarely or never cleaning projects; the equivalent figures for Europe are 54 percent and 27 percent respectively.

Editing capabilities

It is possible that some of the differences in editing practice already observed stem from the variations in the functionality offered by the different software packages used. Some provide a broad range of editing tools while others expect users to tip out their data into an uncontrolled environment such as an Excel spreadsheet or an Access database in order to make changes. We therefore asked companies what editing and cleaning capabilities they looked for in their research software overall. Both batch cleaning - the ability to set cleaning rules and then apply them automatically to data - and the ability to preserve the raw data when making changes are virtually universal requirements (76 percent and 72 percent respectively), especially in North America (84 percent for both batch cleaning and preserving raw data), which we have already seen is where companies are particularly hot on cleaning their data.

Even though so few software packages actually provide the capability to roll back changes and wipe out erroneous edit changes on

Figure 10: Editing capabilities required in research software



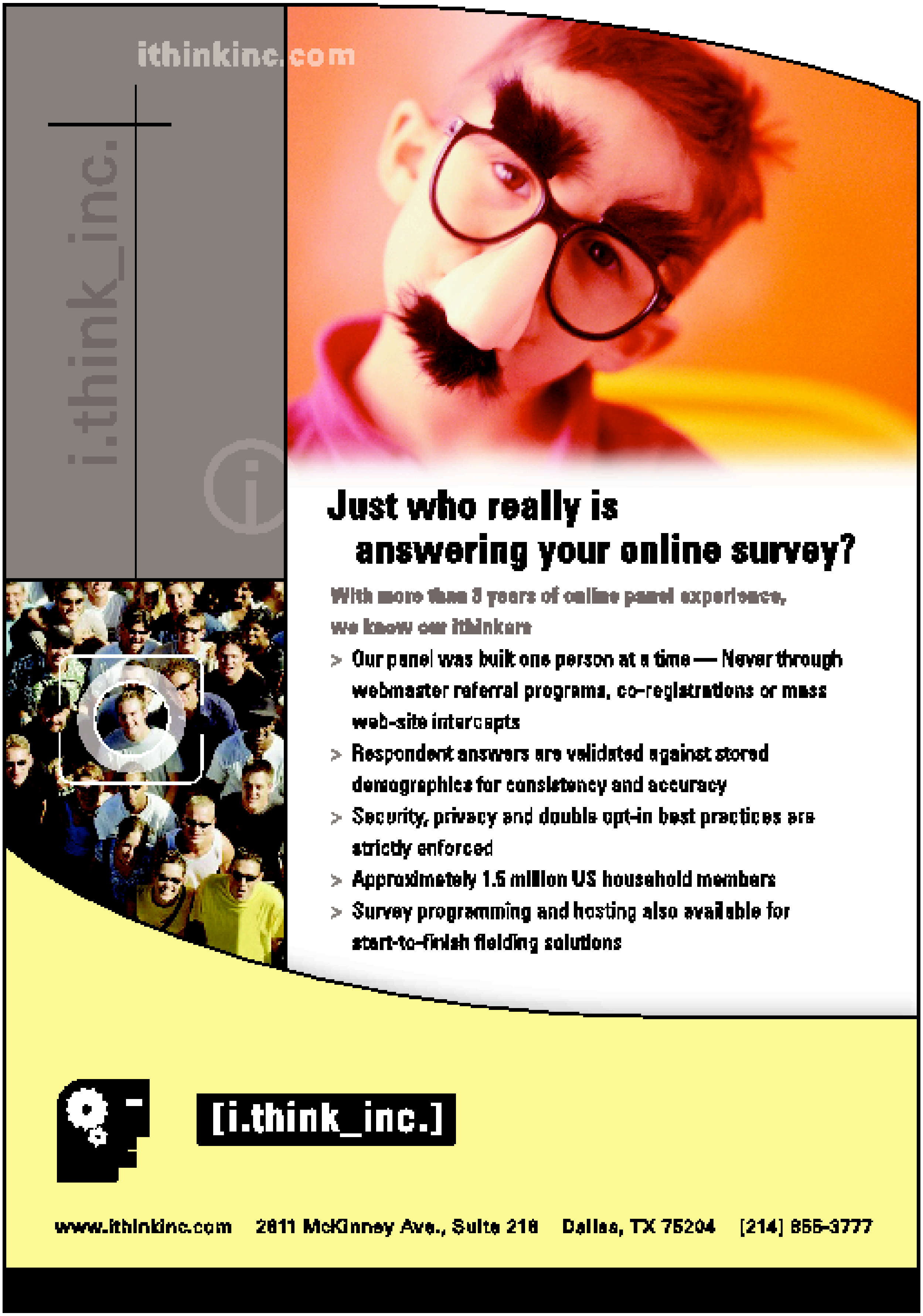

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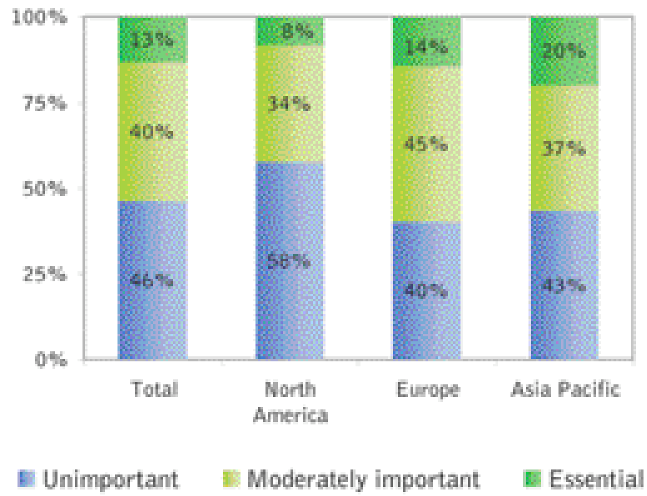
Figure 11: Accessibility Requirements



demand, or provide an automatic audit trail of the actual changes applied, demand is still strong for these features: 57 percent of companies globally and 67 percent in North America want roll back and 51 percent (61 percent in North America) would like to have an automatic audit trail. It is an area of unmet demand in much of today's research software.

Accessibility requirements

Any research company engaged in public or social policy research today is likely to be aware of growing demands from their clients to ensure that online surveys are accessible to respondents with disabilities, and possibly the published results too. We therefore asked research companies how important it was for them that the software they used complied with disability legislation (such as Section 508 in the United States), or allowed surveys to be constructed to AA or AAA rating under the W3C accessibility standards.

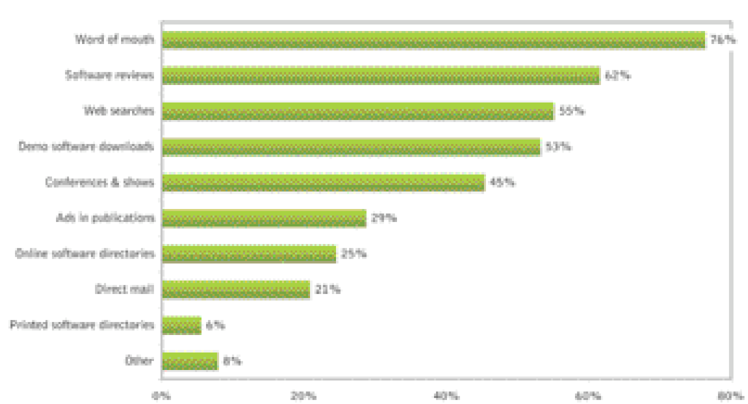
Worldwide, a slim majority (54 percent) considered it either essential or moderately important. Perhaps surprisingly, the reverse is observed in North America, where 58 percent considered accessibility in online surveys, analysis or published results to be unimportant and a slender 8 percent viewed it as essential. Company size had very little influence on consideration, but respondents who described their job functions as either IT or DP were less equivocal. This is one group that would be acutely aware of the difficulties in making a survey Section 508-friendly when the tool is not designed to do this and 61 percent of this group thought it was moderately important, with a further 12 percent considering it essential. And although several of the major software suppliers are now working to ensure that their products are disability-friendly, support across the range of products on the market is patchy and too many would still fall at the first hurdle if put to the test.

Information sources

Our final question was, "When you wish to find out about new research software, what sources of information do you use?" Unfortunately for those responsible for marketing among the software providers, the top two are channels on which they can only hope to exert an indirect influence: word of mouth comes in on top at 76 percent, and software reviews second at 62 percent. Yet the fourth, cited by 53 percent, is the downloadable software demo, which should make this a must for the many software providers that still do not let you take a peek at their software or even a screenshot before tangling with the sales team. Yet the personal touch clearly does have its place: a sizeable 45 percent of decision makers find meeting with exhibitors at conferences and trade shows a good way to keep up with the latest software.

Any software company considering axing the ad campaign needs to think again on these figures: the 29 percent using ads in publications should be viewed as those who actively seek them out, as opposed to the much larger figure who are subject to their influence in a more passive way, which is not something that this survey could measure accurately. | Q

Figure 12: Trusted Software Information Sources



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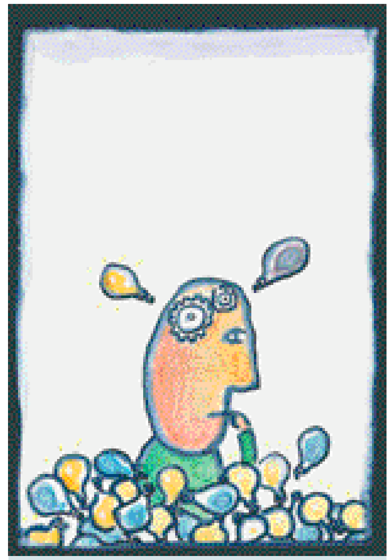
Beyond mere gut feel

A new paradigm for marketing accountability



By Michael Wolfe

Marketing as a function has traditionally followed the "feel-good" paradigm that is rich in intuition and gut feel, one that often has only a vague understanding of what has worked and will work in the marketplace and what the sales and financial returns are on an organization's marketing efforts and investments. Probably no other statement typifies this paradigm than the famous quote from department store mogul John Wanamaker, who said, "Half my advertising is wasted, I just don't know which half."

Today, marketers from small companies to large have the opportunity to adopt a new paradigm. This new paradigm is called accountability marketing and it provides a scientific basis for understanding precisely the effectiveness and returns-on-investment from a company's marketing efforts. Marketing response modeling (MRM) is a tool that will play a vanguard role in moving organizations toward this new paradigm. The focus of this article is to tell you what is involved in adopting this tool, how it serves the organization's need to move to accountability marketing and the actual benefits that companies can harvest by adopting this tool and new marketing paradigm.

Operating principle

The feel-good marketing paradigm is one that unfortunately has been the operating principle of many marketing organizations. It basically says that a company can follow a specific marketing strategy and spend its marketing resources not because it has factual knowledge of the results of these actions beforehand but because basic intuition or gut feel says that it is the right thing to do.

Surely, in today's scarcity economy, with layoffs and radical cost-cutting, companies can no longer afford to follow this path. For one, marketing budgets represent from 20 to 25 percent of a company's total revenues, often the largest line-item expense on the P&L statement. This places the marketing function into serious peril, as marketing costs become the target of the CFO's budget ax whenever reality catches up with lofty, indefensible business plans.

The use of marketing response modeling has benefitted many companies. A Marketing Leadership Council survey of companies that have adopted this tool found that, on average, marketing productivity

Editor's note: Michael Wolfe is principal of Bottom-Line Analytics, a Marietta, Ga., consulting firm. He can be reached at 770-485-0270 or at blanalytics@aol.com.

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increased 20 to 30 percent! Overall, this means that these companies achieved the same results by spending 20 to 30 percent less, or that they were able to squeeze 20 to 30 percent more out of their present marketing spending by using the guidance that these models provide.

Five steps

There are five essential steps required for a complete market response modeling project. These steps involve the following:

1) A "wheel of fortune" exercise to establish data requirements and a plan for collecting essential input information for the modeling exercise.

2) Building and validating the models. This is a technical phase, but models must demonstrate proven validity for the task at hand. Validating models often requires holding out certain periods of data and testing how well the models forecast over those periods.

3) A model diagnostics phase. Once valid models are constructed, this exercise amounts to a diagnosis of the effectiveness of recent and past marketing efforts and programs. Included here is a linkage of model output to financial data to determine current marketing returns-on-investment.

4) The third phase is marketing optimization. Here, you would link current marketing program spend with the marketing driver volume contributions from the models. In doing so, you can derive efficiency ratios to determine how much volume per dollar spent each marketing element is presently delivering. Then you marry modeling-based sensitivities to marketing spend and determine, with a given marketing budget, the ideal or best-practice allocation of marketing funds to drive volume, revenue or profitability.

5) The final phase of the process is referred to as strategy simulations. Here, you marry forward marketing plans with model sensitivities and actually simulate or forecast the impact of any given plan. Once that is done, you will also need to link the results with financial and planned spending data in order to arrive at an assessment of the net incremental profitability of a current plan.

Figure 1: Marketing Drivers for Sample Retail Company

The business of a CPG company, such as the beverage maker shown here, is driven by a plethora of marketing programs. In order to manage spending, there must be an accurate linkage between how much is spent on each program relative to the incremental sales each generates.

Step 1: The wheel of fortune exercise and determining model data requirements

First of all, it must be understood that going through a market-modeling exercise requires due diligence in specifying and collecting the required information or data. Most often, these data will be a series of metrics over time, which describe both the output (sales or revenues) and the key marketing or other drivers of business performance. Frequently, this begins with a whiteboard type of exercise with company internal information and systems experts. With your desired result or output at the center of the hub of the wheel, you then construct the spokes to include a comprehensive list of marketing and other drivers of the business.

An example of this is illustrated in Figure 1. This example displays what would be the key business drivers for a soft drink brand such as Coca-Cola and is also similar to what you would see with other consumer products businesses. It is important to note that for other industries, the drivers might be different. For example, for an insurance business, agent hires and agent compensation schemes might be an important driver. Likewise, it is important to note that not all business drivers are necessarily marketing related or within the control of the company. Some of these might be external factors such as the economy or weather. Or, perhaps like the airline industry, the 9/11 terrorist attacks were an event that had a definite and measurable impact on that business. These types of factors also must be included, along with their metrics.

The key to this exercise is that, once the wheel has been constructed, you must have explicit metrics for each element. These metrics should be measures of the level and intensity of each activity as they are

An Outline of the Market Response Modeling Process

Step 1: Data input - Specification and collection (wheel of fortune)
Step 2: Model-building and validation
Step 3: Marketing diagnostics - What's working and what's not? Sales decomposition (how much of my sales are due to advertising, promotion, etc.?). Marketing variance (how much is my present performance trend being driven by advertising, promotion, etc.?). Marketing ROI (what is net profitability of my current marketing efforts?).
Step 4: Optimization - Based on my current marketing spend, what is the best way to allocate those funds going forward? What is the benefit of moving toward a more ideal marketing spending plan?
Step 5: Strategy simulations - What are the volume and profit implications of my forward business plan and strategy?

executed in the market. This could be expenditures or it could be some other metric, such as advertising gross rating points. Once the data has been specified, all of these need to be integrated into a single database covering the entire historical period in which the model is to be constructed.

Step 2: Building the models

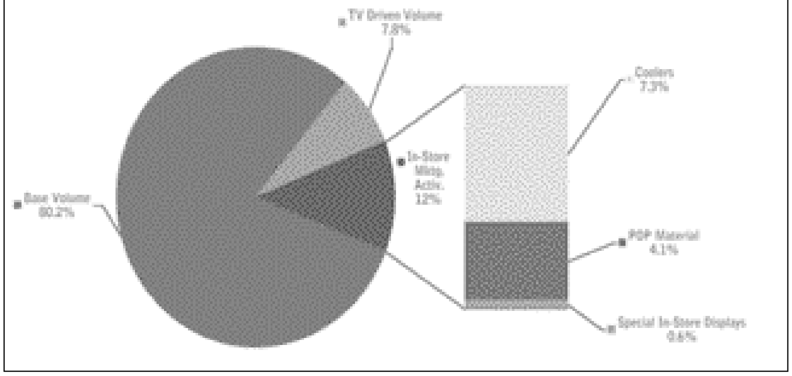
Market response modeling is a data-intensive and data-driven exercise. It is critical to get it right up front. As the saying goes, "Garbage in, in garbage out." While this step requires a resource with the due technical expertise to construct the models, it is important that companies require that the model-builder provide them with sufficient validation in order to underscore the model's validity and integrity. What is usually required here is what we call a holdout validation. In other words, about 10-20 percent of the data are to be withheld from the modeling process and validation entails a comparison of how well the model predicts sales over the unknown periods.

Step 3: Market response model diagnostics - What's working well and not so well?

Once models are completed and validated, then we move into the diagnostics phase. This phase focuses on current and past marketing initiatives and tells you what is working and what isn't. By identifying the not-working components, marketers will gain the insight to mine marketing spending of considerable savings.

One of the key outputs from this analysis is a sales decomposition analysis such as the one shown in Figure 2. A sales decomposition analysis conveys a simple message. In a pie chart as shown here, it tells you the proportion of your sales that each marketing element, such as promotion and advertising, has delivered to your total business. Note that marketing does not represent 100 percent of sales. The difference between total and marketing-driven

Figure 2: Brand XYZ Sales Decomposition



sales represents a term called base volume. Base volume is essentially the estimated level of sales that would exist in the absence of these marketing activities, while the total marketing contributions represented here shows you the total risk to your business if your company ceases its marketing efforts.

A second type of marketing diagnostic is what is called marketing variance analysis, which essentially tells you what is driving your current business performance and trends and by how much, or simply put, how much of your current performance is due to advertising, pricing, etc. A sample of this is represented in Figure 3. In Figure 3, you can see the degree to which retail price and advertising are driving current performance for this brand. This analysis is the definitive scorecard regarding what's been working and not working in the marketplace and how effective the company has been in executing the present plan.

Another component of the diag-

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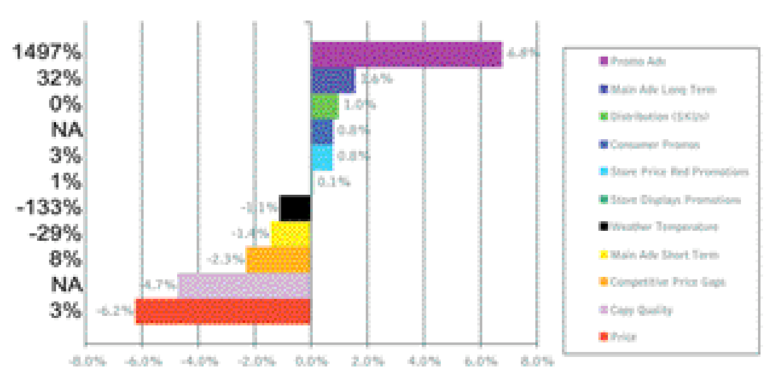
Figure 3: Brand XYZ Annual Source of Marketing Variance



nostics phase involves marrying model output information from the sales decomposition with marketing expenditures and brand profit margins in order to derive a complete marketing return-on-investment analysis. An example of this type of analysis is depicted in Figure 4, which shows a comparison of the relative costs and financial returns for four major buckets of marketing spending for various forms of advertising and promotion.

Step 4: Marketing spend optimizations - Where best to put those dollars?

The next stage requires merging model response information with actual marketing expenditures for each marketing driver represented in the model. This also requires accounting information pertaining to spending for each key marketing program.

As shown in Figure 5, the concept is simple and straightforward. Visually here, you would compare model-driven output volume for each marketing element with its corresponding expenditures. Here you can compare advertising and trade and consumer promotion spending with their relative volume contributions derived from the models. As you can see in the example, advertising was truly driving more sales than its proportion of the marketing budget would suggest. Based on this, you then extend this analysis by coming up with an optimization of the marketing budget, which provides you with the mix of spending that drives the most volume or profit.

The optimization phase clearly is one of the most important because it provides clear direction on how best to spend a company's marketing budget. Not only this, but it provides a view as to the degree of inefficiency in the present marketing budget and can quantify the benefit of moving toward a more ideal or optimal marketing spending plan. Experience indicates, as a rule of thumb, that somewhere between one-third and one-half of all marketing expenditures can be classified as non-productive or highly inefficient. Clearly, with companies spending from 20 to 25 percent of their total revenues on marketing, this represents a substantial saving opportunity as well as a tremendous overhead.

As a final exercise here, you can compare what sales, revenue or profit opportunity exists by moving

Figure 4: Marketing Return on Investment Analysis

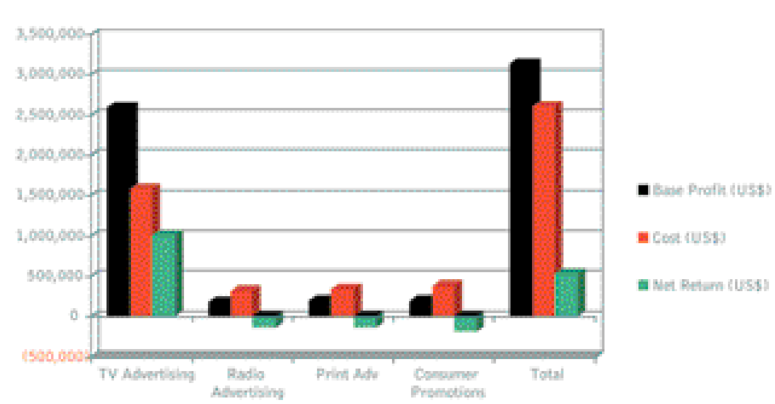


Figure 5: Comparing Total Marketing Incremental Volume and Direct Marketing Expenditures for Advertising, Trade Promotion and Consumer Promotion

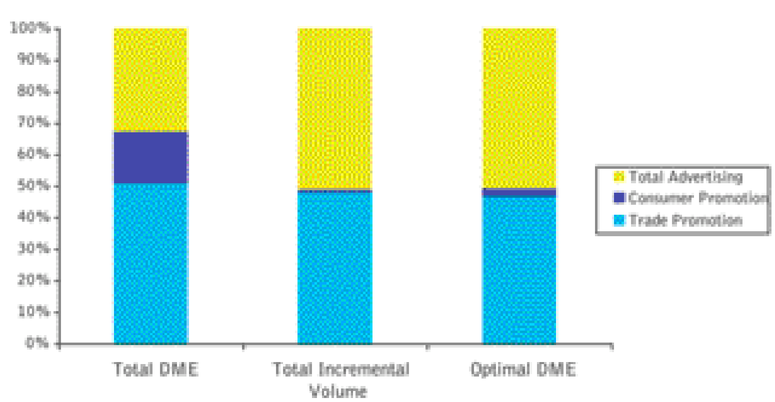
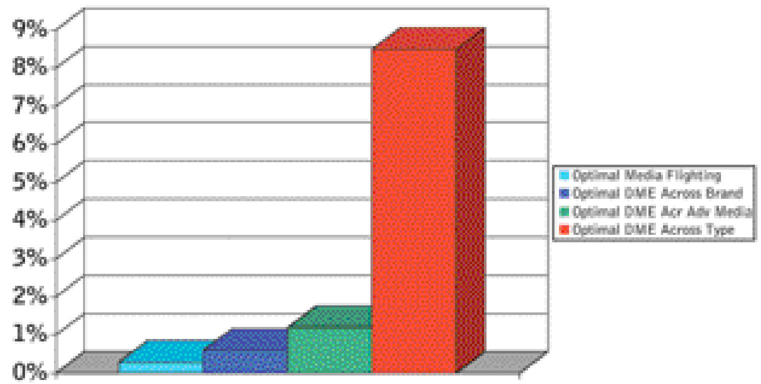


Figure 6: Summarizing Estimated Volume Growth Potential from Activating Selected Marketing Efficiency Improvements



from the present marketing spending scheme to one that is more ideal or optimal. An example is illustrated in Figure 6. For this business unit, there is an opportunity to grow by an additional 10.6 percent if management can redeploy current marketing resources towards the more efficient or ideal mix suggested by the model. For almost any business, an additional 10 percent of bottom-line growth surely represents a substantial sum - one that may very well mean the difference between zero and substantial bonus payouts at the end of the year!

Step 5: Forward strategy simulations - forging a go-to-market plan for maximum payout

The final stage of the process involves exploiting the market response models in order to take a forward look at the likely consequences of future business plans. Figure 7 illustrates an example. In this instance, a five-point strategy is laid out involving launching a new soft drink package, a price rollback, expanded advertising spending and the expansion of in-store coolers. From the model, you can then document the expected growth contributions from each action, as shown.

At this final phase of the process, you have now successfully outlined a go-to-market business plan. Not only have you identified the upside volume potential of the plan, you have also isolated the contributions from each component. Such a simulation provides a future view of the results of planned actions and gives a specific rationale for that plan - a justification for upper management, if you will. Once this step is completed, then only one more exercise is recommended. That involves sharpening the pencils and doing the due diligence of turning this into a

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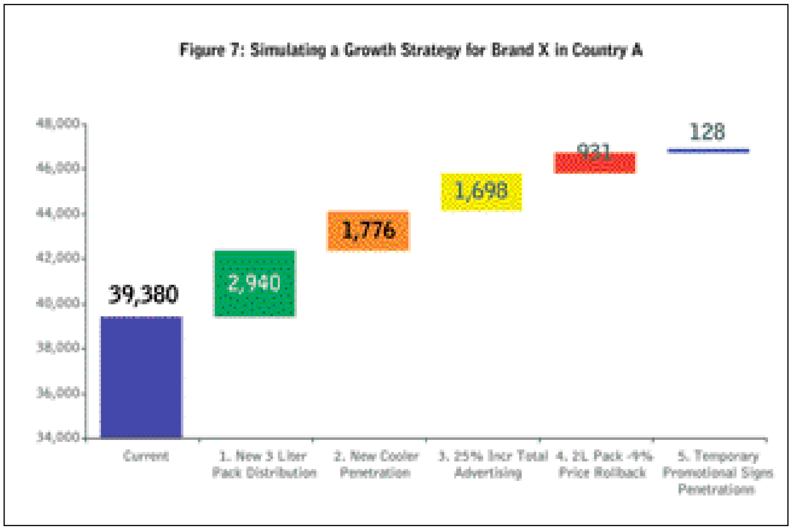

Figure 7: Simulating a Growth Strategy for Brand X in Country A

full-blown financial justification.

Moving forward with the accountability marketing paradigm

As shown in this article, market response modeling tools can provide every company with the capability to move towards a new marketing paradigm. Tools such as market response modeling have shown substantial and verified benefits in those select companies that have chosen to take the leading edge.

For example, at the Coca-Cola Company, a number of instances can be cited where substantial returns were uncovered through the application of market response models. In one Coca-Cola division, the company was facing a dilemma with a money-losing returnable plastic package. In fact, the company was losing nearly $7 million on this package. After completing a market response model exercise, the challenge was to come up with a simulation that allowed the company to discontinue this package, perhaps launch a new package and yet not damage the total volume for the company brands. To make matters worse, at the time of this exercise, the company's total volume was declining by 16 percent.

As a result of our modeling, model simulation was used to recommend that the company discontinue the unprofitable package and launch a new plastic one-way pack. By doing so, it was estimated that total volume would increase by about 11 percent. One year later, this division actually implemented these recommendations as presented. The unprofitable pack was discontinued and the new pack introduced. As a consequence of this action total volume was not up 11 percent, but rather 13 percent! In consideration of the $7 million in savings and the additional profit generated through growth, a total of about $14 million dropped to this division's bottom line!

A few years prior to the above, a market response model project was conducted in a tropical country which, at the time, was showing the weakest Coca-Cola case sales performance among 23 peer countries within its greater business group. The challenge at the time was to come up with plans and recommendations that would hopefully reverse the fortunes of this country. As model simulation exercises were completed, an opportunity was discovered to grow the business substantially by placing new coolers in some large and selected cities and channels (actually for this developing country, the largest channels were mom-and-pop stores and street kiosks).

The second part of the recommendation focused on expanding availability or distribution of Coca-Cola company secondary brands (such as Fanta, Sprite and some local brands the company owned). After the recommendations were made, the performance of this country's case sales was traced. One year later, the country had improved from 23rd to ninth place in case sales performance within the business unit. After 18 months, its performance had improved even more: it was in first place among the 23 countries. Not only did the country's business performance improve substantially over this time, but the sales improvement was directly linked to the execution of the recommended two-point strategy! Overall, the benefits of this action were substantial. Given the swing factor in case sales, the total improvement in the country's profitability actually increased by about $9 million.

Might seem daunting

While the task of building predictive models might seem daunting, the only requirement is that companies have end-customer sales data and calendars of when and how much was spent on various marketing initiatives. This could happen in either consumer or business-to-business markets, for large companies or small.

The benefits to companies who travel down this road are many. These include identifying your unproductive marketing programs, with savings potential in the millions. In addition, companies will be able to identify business opportunities and quantify both the sales and profitability of those current business strategies. What's more, companies will get fact-based guidance on how to best allocate marketing-mix spending across sundry marketing programs that are likely to yield the largest net results.

In sum, moving from the feel-good marketing paradigm to the accountability marketing paradigm might require changing one's mindset about how marketing operates within your organization. Nevertheless, the benefits and necessity of moving towards the new paradigm are clear and compelling for large companies and small. | Q

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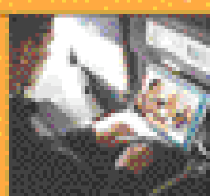
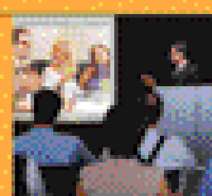


Edited the key clip and e-mailed it to Kevin.



Kevin presents our findings to the team.

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Survey Monitor

continued from page 10

teens have some interesting marketing implications. This survey indicated that younger teens are exercising even more frequently than older teens (who may have a larger number of activities vying for their time). Thus younger teens may be especially good targets for replenishing, energy and performance-enhancing foods and beverages. Older teens, on the other hand, perhaps because they are so busy, place a lot of emphasis on convenience - both quick/easy to make and able to be consumed on the run. Older teens also purchase more food themselves so they are more price sensitive. For more information visit www.buzzback.com.

Most researchers see increased use of online research in next six months

Market researchers worldwide are expecting their companies' use of online research and online access panels to increase in the next six months, according to a survey conducted by Greenfield Online Inc., Wilton, Conn., and its European subsidiary Ciao. Study results indicate that 76 percent of market researchers surveyed in North America and 85 percent in Europe are predicting their use of online to increase.

The Greenfield/Ciao Online Research Barometer study interviewed 572 market researchers worldwide in November 2005 to provide a snapshot about the adoption of the Internet for market research surveys. The study has been fielded twice yearly since mid-2004.

"The Barometer indicates that online is maturing and evolving as a research methodology, yet still experiencing growth," says Nicolas Metzke, senior vice president of survey completion at Greenfield/Ciao. "The study suggests that the lifecycle of online usage in North America is a flattening curve, with 24 percent of researchers expecting no change in usage. This compares with 13 percent in Europe. However, no researchers anywhere are predicting that their online usage will decline.

"In North America the study results show that most researchers have primarily migrated telephone studies to online in the last 12 months, while mall studies were the second most common study methodology to be migrated to the Internet," says Metzke. "However, in Europe, while telephone-to-online is still the most common switching that has occurred, half of researchers say they have replaced also face-to-face studies with online in the last 12 months."

The two most important reasons for conducting market research studies online remain time (mentioned by 82 percent of researchers worldwide) and competitive pricing (79 percent). In North America the ability to incorporate multimedia technologies into surveys and having access to complex target groups are greater considerations than they are in Europe, where researchers are more likely to use online methodologies to simply gain access to respondents.

The study also reveals differences in usage of online research by industry sector. Consumer goods is the industry most using online research worldwide. In North America, finance, health care and retail are also very important markets. In Europe, researchers are more likely to be conducting online studies for the telecommunications, information technology and media research industries.

"We've seen in our business that besides one-off ad hoc studies, online is being used more and more for tracker or longitudinal, omnibus studies and custom panel research, and the Barometer findings show that this is an industry trend," says Gunnar Piening, senior vice president of sales and operations, Europe and Asia, at Greenfield/Ciao. "Both short- and long-term tracking studies are increasingly being undertaken online. Only around a third [36 percent] of market researchers using online report that they use it for one-off ad hoc studies only. The hardest part in attracting researchers to online tracking studies is making the switch because of the initial loss of data consistency, but the advantages of online have made it a very attractive option for many." For more information visit www.greenfield.com.

Consumers choosing 'healthy' over 'diet'

Consumers are rejecting diets and dieting in favor of healthy choices they can live with over a lifetime, according to The National Study of Public Attitudes and Actions Towards

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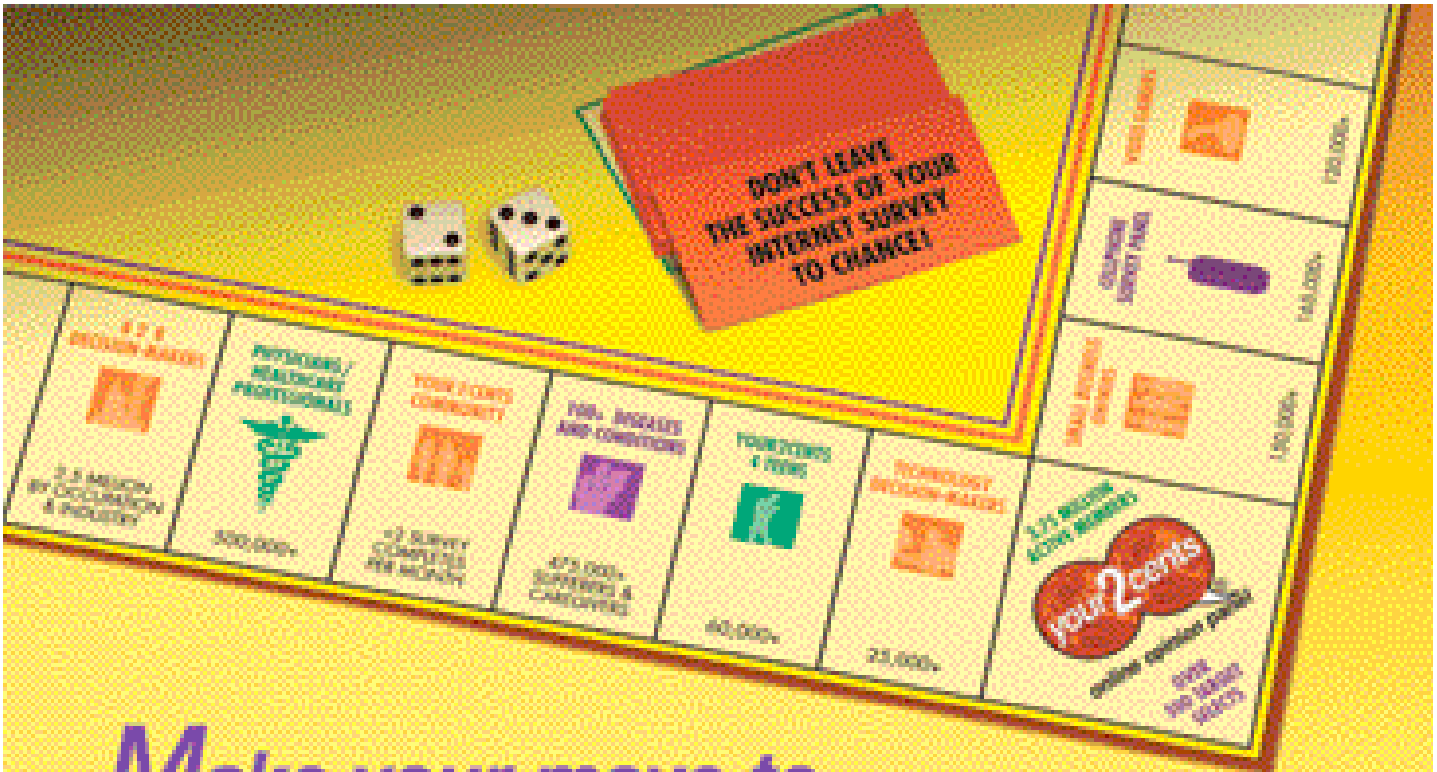

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Shopping and Eating from St. Petersburg, Fla.-based research firm HealthFocus International.

In fact, confidence that weight can be managed by diet and exercise is down significantly from 93 percent in 1990 to 88 percent today. "Shoppers tell us that diets are just recipes for failure. Even if successful in the short-term, the weight comes back on later unless real lifestyle adjustments are made," says Linda Gilbert, president of HealthFocus International. "Toward that end, shoppers are more interested in 'eating healthier' than in dieting."

The study shows that while more shoppers today describe themselves as overweight, fewer are dieting to lose weight. Only 8 percent of all shoppers choose healthy foods or beverages primarily to "lose weight," while 30 percent make choices to "ensure future good health." And, 75 percent of shoppers strongly agree or agree that it is more important to eat light rather than diet. "Almost nine in 10 shoppers agree that eating from all of the food groups in moderation is a healthy way to eat," says Gilbert. "Healthy and unhealthy choices co-exist in a balanced diet for consumers, so companies need to find the intersection between health and indulgence that will increase their product use without compromising consumer satisfaction."

While the study concludes that the low-carb diet has gone the way of other fad diets, HealthFocus predicts that the focus on limiting carbohydrates will have a lasting impact on how consumers think about health and weight management. The focus will be on smart carbs such as fiber to help manage blood sugar levels and satiating proteins to satisfy one's appetite.

The survey found that heart-healthy diets prove to be the most popular diet choice (52 percent of all shoppers), followed by a diet low in fat (38 percent) and a diet high in fiber (38 percent). Low-calorie diets and vegetarian diets trail with 22 percent and 8 percent, respectively. For more information visit www.healthfocus.com.

Virus and ID theft fears replace spam concerns

Results from the Consumer Email Study from New York-based DoubleClick Email Solutions show a merging of personal and professional e-mail usage, and a declining concern with regard to spam. While consumers have become increasingly reliant on the channel, they have also become increasingly sophisticated in their use of e-mail and are more comfortable with marketers leveraging data to make communications more relevant.

According to the data, 57 percent of respondents view their work e-mail at work during the day at least occasionally, while almost as many view work e-mails from home in the evening (55 percent) and on weekends (54 percent). In addition, 48 percent of respondents check their personal e-mails at least occasionally at work during the day, with 21 percent doing so all the time.

This data shows a constant usage of e-mail and, for marketers, it calls into question the notion of a "best" time of day or day of week for deploying e-mail campaigns. It also highlights the importance of effective preference management and data capture to ensure consistent and relevant communication with customers.

Almost half of all respondents report owning at least three e-mail accounts. While 95 percent consider one of their addresses to be their primary account, almost three-quarters of respondents (72 percent) use a single address for making online purchases. The average consumer has maintained the same e-mail address for four to six years, while two-thirds of respondents have never changed their e-mail address. Those who did change their address did so most often due to changes in employment or ISP, especially when upgrading to broadband. Of particular interest is the value that consumers place on free e-mail addresses, which have been maintained for an average of six years, probably due to their accessibility from home, work or the road.

While spam still constitutes the largest portion of e-mail that consumers receive the overall percentage has dropped every year since 2002 (from 45.5 percent in 2002 to 30.3 percent in 2005), and while spam is still an issue that concerns a large number of consumers (55 percent are very concerned), viruses (75 percent), identity theft (67 percent), spyware (66 percent) and scams (61 percent) are of greater concern to consumers.

Consumers have consistent views of what constitutes spam, most of which match industry definitions, although almost half of respondents also consider permission-based e-mail that comes too frequently or that is no longer relevant as spam. With regards to dealing with spam, almost half of respondents check their bulk mail frequently, usually to confirm that no wanted messages have been incorrectly filtered into their bulk folder. More than 40 percent report finding legitimate e-mail in their bulk folders.

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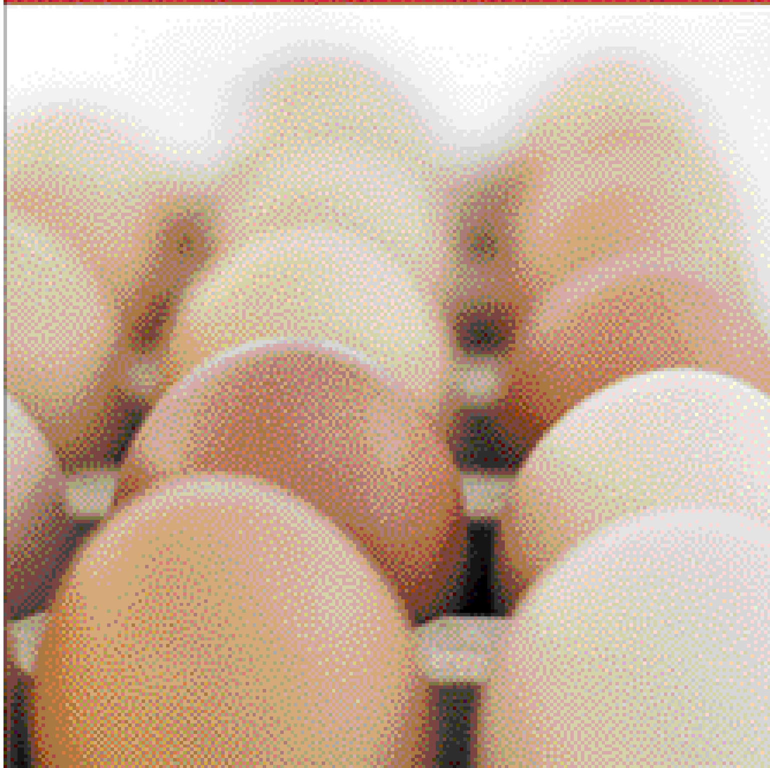

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Minneapolis: Focus Market Research, Inc.
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Northern New Jersey: Meadowlands Consumer Center, Inc.
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Tampa: The Herron Group of Tampa, Inc.
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E-mail continues to drive commerce both online and in stores. While 78 percent of respondents have made a purchase as a result of an e-mail, 59 percent of respondents have redeemed an e-mail coupon in a store and almost one-third of respondents have clicked on an e-mail and made an immediate purchase. Another third of consumers reported clicking on e-mails for information and returning later to make purchases. For marketers, it is particularly important to factor this latter activity into their ROI analysis for their e-mail marketing programs.

It is also important for marketers to track the branding impact of their e-mail program. Seventy-four percent of respondents point to "a brand I know and trust" as the element most likely to drive a response to an e-mail. DoubleClick Email Solutions has commissioned a study, which will be released in early 2006, to examine this impact of e-mail on the marketer's brand.

DoubleClick, working with ROI Research and the Greenfield Online panel of 900,000 U.S. households, polled 1,000 e-mail users via e-mail during May and June of 2005. All respondents recruited use e-mail/Internet one or more times per week, which reflects the usage of the larger online population (94 percent of the 18+ online population according to Nielsen, 2003). Trending information was derived using the data from previous years. The sample mirrored previous studies and reflects the online population as a whole. For more information visit www.doubleclick.com.

Canadian execs: business intelligence efforts aren't working

According to a national online study of over 500 business decision-makers conducted by Vancouver-based Ipsos Reid on behalf of the Canada's Marketing Research and Intelligence Association (MRIA) and business technology firm EDS, business intelligence (BI) activities received mediocre scores in terms of companies' overall performance and involvement. The study shows that while overall awareness of various business intelligence components ranges from medium to high among BI decision makers and business executives, existing BI activities are fairly limited in practice, and require more resources and attention in the future.

When asked which of the following areas their organization is involved in, about four in 10 BI decision makers surveyed report to be involved in either business intelligence/knowledge management (45 percent), data mining (42 percent), environmental scanning/secondary research (41 percent) or competitive intelligence (38 percent). Only about one-third of BI decision makers surveyed indicate that their organization is involved in metrics/key performance (31 percent) indicators or primary market research (30 percent), while the level of participation in designing and implementing business intelligence programs (17 percent) and technical support/maintenance of BI software and applications (16 percent) is even lower.

When asked to rate their organization's overall performance on particular areas of BI, the mean score for BI is only 6.8 (on a 1-10 scale). The scores for certain areas of BI are also somewhat mediocre – environmental scanning/secondary market research scores 6.3, data mining 6.5, primary market research 7.0, and competitive intelligence rates a 7.1.

When asked whether they think their organization should be spending more, less or about the same on BI in the future, the majority (about six in 10) of BI decision makers say their organization should be spending the same amount. However, a sizable minority (about one-third) say that their organization should be spending more in the following areas: business intelligence (36 percent), data mining (32 percent), market research (33 percent), competitive intelligence (34 percent), and environmental scanning/secondary market research information (27 percent). Very few (less than 9 percent in all cases) believe their company should be spending less in any of these areas.

Those at larger organizations are more likely to state that their organization should be spending more on BI initiatives. In fact, the percentage who say their organization should be spending more on each of the five BI areas is 50 percent higher than those from smaller organizations.

For the purpose of this study, BI is defined as a process for professionally gathering, processing, analyzing and disseminating decision-making information relevant to an organization. It can also be referred to as knowledge management. BI involves the collecting, filtering, analyzing and prioritizing data from various sources including: data mining (from customer records, databases and other internal sources); primary market research (from survey-based research, focus groups, etc.); competitive intelligence (organized collection of information about your competition); and scanning or secondary market research information (market data such as industry information on trends, technology, sales, production levels, inventories, viewership, readership information).

The findings are from an online Ipsos Reid poll conducted on behalf of MRIA and EDS between November 7-15, 2005. The poll is based on a randomly selected sample of 514 adult Canadians from Ipsos Reid's Canadian Internet Panel who are responsible for business intelligence within their organization. With a sample of this size, the results are considered accurate to within ±4.3 percentage points. For more information visit www.ipsos-reid.com or www.mria-arim.ca.

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Product and Service Update

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Study will examine behavioral vs. contextual ad placement

New York-based audience measurement company TACODA is partnering with Next Century Media, a media research company based in Gardiner, N.Y., to develop a study of how and why behavioral targeting outperforms contextual targeting in numerous measures of engagement including purchase intent, advertising awareness, branding measures and ROI.

"Placement of ads in an editorial context has been the gold standard for many advertisers. However we are seeing a significant number of campaigns for major advertisers where the behavioral targeting unit outperforms the contextual targeting ad unit in terms of absolute levels of click-through, purchase intent, advertising awareness, and other measures of audience engagement," says Dave Morgan, CEO of TACODA. "When this was also reported by other delivery networks, we felt it was too revolutionary and fundamentally important to ignore. We expected behavioral targeting to outperform contextual targeting in terms of eCPM - cost efficiency in reaching target audiences - but we never expected that behavioral would 'out engage' contextual."

TACODA and Next Century Media have begun a four-pronged research effort, which will span more than a year, to understand how it is possible for behavioral targeting to outperform contextual targeting on engagement metrics even leaving cost aside. "The accumulation of cases is too large to be ignored," says Bill Harvey, CEO of Next Century Media, "and is one of the most surprising set of findings I've seen in a couple of decades. How could an ad for a product engage its target audience better in a neutral editorial environment than in an environment that is all about that product category? We studied the data and came up with two hypotheses so far. One we call Clamor: perhaps the user's eyes sometimes avoid the ads for cars, for example, in a car-related site, because there are just so many of them clamoring for the user's attention. To investigate this further we have already begun an eye tracking study being conducted by The PreTesting Company. The other hypothesis we call The Unexpected: perhaps users who are known from their Web behavior to be targets for a specific product are surprised when they see an ad for that product on a site where they wouldn't expect to see it. We are planning to conduct a brainwave experiment to check out the Unexpected hypothesis."

"In addition we are conducting a series of controlled campaign experiments measuring click-through, a range of branding communications metrics and ROI," says Morgan. "And we are asking the industry to provide cases, whether anonymous or not, that can shed light on this phenomenon. The findings of this program will be shared with the industry and will have implications for how to use contextual targeting and behavioral targeting to their greatest advantage, so as to maximize ROI for the advertiser and add to the ongoing growth of the Internet as an advertising and marketing medium." For more information visit www.nextcenturymedia.com or www.tacoda.com.

Cost of Care module from PharMetrics

Watertown, Mass.-based PharMetrics, a unit of IMS Health, is now offering its Cost of Care market intelligence module, which gives pharmaceutical companies insights for measuring the impact of their products and other medical interventions on health care costs. It incorporates anonymous patient-level insights to help marketing teams create value-oriented messages and maximize the formulary status of their brands.

Typically, manufacturers rely on in-depth pharmacoeconomic studies to identify disease-related costs and compare the advantages of alternative therapies. PharMetrics' Cost of Care module supplements these traditional studies, providing a solution to assess the total health care cost associated with different treatment approaches. For more information visit www.pharmetrics.com.

Updated version of DataFriend software

Russia-based research company Comcon has released DataFriend 6.0, a new version of its media and market research software. DataFriend helps users analyze market research data and build reports using a range of statistical tools. DataFriend 6.0 offers a cluster analysis module for customer segmentation. Its cluster analysis is based on the K-means method. No special programming skills are required. The new version also provides new statistics such as correlation, delta and rank. New

No panelists were harmed in the fielding of this study.

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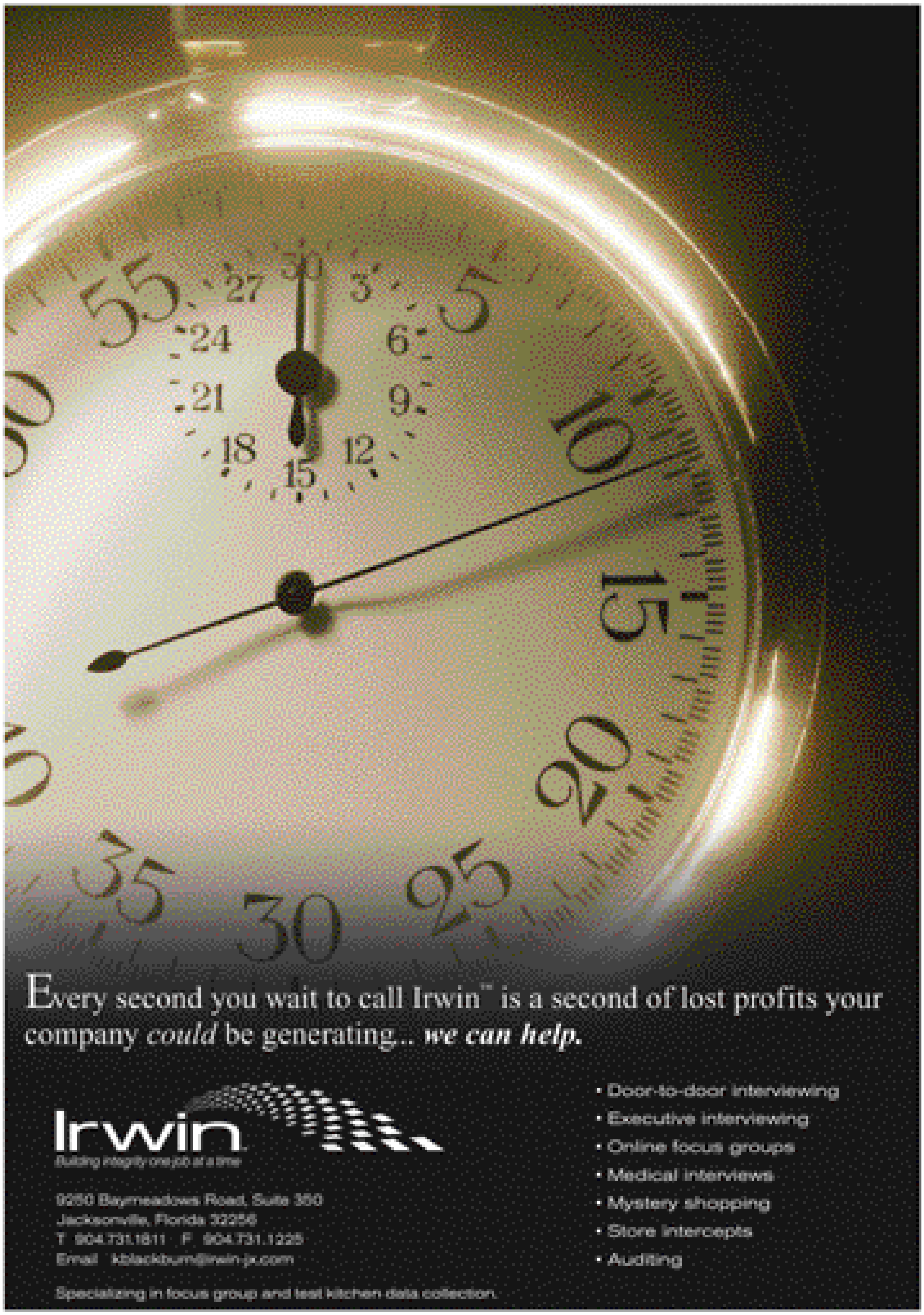

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types of diagrams have been added to visualize indices, correlation and other statistics. The software also offers tips to make the analysis process more efficient. For more information visit www.datafriend.net.

Radio listening measured by new passive system

Paris-based Ipsos and the providers of the syndicated study the Media Audit have joined forces to market a new passive-media audience measurement system for the media industry in the U.S. The two came together in response to the radio industry's interest in an alternative ratings service that will use technology to monitor radio listening and include new ways to sell radio's advertising strengths. Most recently Clear Channel Radio announced an RFP for an alternative measurement system. "Radio measurement has remained the same over the past 40 to 50 years," says Bob Jordan, president of International Demographics, Inc., publishers of the Media Audit. "Yet the media world that the measurement system is trying to measure has changed dramatically."

The Media Audit/Ipsos new audience measurement system includes two forms of monitoring software. One form is an encoded watermark embedded in the broadcaster's audio signal. The second form is an audio matching technology that will measure broadcast signals of those stations that are not encoded. The open-technology solution does not involve the manufacture of hardware. The smart cell phone, via the Ipsos software, monitors the individual's exposure to radio, other electronic media, the Internet and out-of-home. In addition it has the facility to track retail shopping patterns via a GPS system.

"Cooperation of survey participants is a critical component of good research," says Richard Silman, global CEO of Ipsos Media. "We believe that cell phones are such an integral part of most peoples' lives that we will get a high degree of cooperation and compliance with survey participants via their cell phone. This applies particularly to the younger demographics."

According to Ipsos the smart phone solution offers the following advantages: it is a familiar device that does not require the respondent to carry a piece of equipment that may attract curious glances or questions from friends; it does not require the research firm to manufacture special hardware for signal embedding or detection; the power and functionality of the device will increase in line with developments in smart phone technology; although the development work thus far has concentrated on the signal encoding approach it will also incorporate an audio matching capability in the same device; the system offers the potential for very large samples - in due course anyone who has a smart phone will be able to participate once the software has been downloaded to them; as a device for transporting the software, smart cell phones will insure a greater degree of compliance in usage of this audience measurement system. The Media Audit will initiate a field test of the Ipsos watermark software in mid-year 2006 in the U.S. For more information visit www.themediaaudit.com.

TNS to track local cable television advertising

Beginning in March 2006 New York-based TNS Media Intelligence will begin tracking advertising occurrences for local cable television in the San Francisco and Boston markets. This marks the first undertaking to provide detailed information on advertising occurrences for local cable television in the U.S. TNS MI will monitor multiple cable systems per market, allowing clients to differentiate commercial announcements that cleared market-wide, versus regional zones. Tracking of commercials will be done from 5 a.m. to 2 a.m., seven days a week. All advertising occurrence detail will be provided, including network, category, advertiser, brand and number of units. The first set of data for San Francisco and Boston will be available in April 2006. For further information please visit www.tns-mi.com.

Briefly

Research firms Trendex North America, Toledo, Ohio, and Marketing Group, Mexico City, have begun jointly operating a nationwide quarterly in-home personal interview omnibus in Mexico. The omnibus will be based on interviews conducted by Marketing Group in 15 of Mexico's major metropolitan areas. For more information visit www.trendexmexico.com.

London-based Research Now has launched a Spanish client service team, which will offer clients access to profiled Spanish consumers who are members of Research Now's Opine Y Gane online research panel. Fiorella Calderon Boza has been promoted to client development manager for the Spanish market and will be supported by Client Service Executive Andres Salazar. For more information visit www.researchnow.co.uk.

San Francisco-based research firm MarketTools, Inc. has introduced a new Hispanic-focused research service called Hispanic Reach, which blends online and offline respondents, from both acculturated and unacculturated Hispanic populations, to provide insights to market researchers. The 100,000-plus member U.S. Hispanic online panel, with options such as a choice of acculturation segments, allows marketers to capture behaviors, attitudes and responses to better understand U.S. Hispanic consumers. For more information visit www.markettools.com/solutions/sample/hispanic_reach.html.

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Research Industry News

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of any wrongdoing.

Acquisitions/transactions

Milwaukee-based **Market Probe** has acquired the **Research Base FZ-LLC**, an independent research firm based in Dubai, United Arab Emirates. Abu Samuel, president of the Research Base, will stay on to manage the operation. The firm will be known as Market Probe-Middle East.

Research International, London, has acquired the majority of shares in its joint venture partner **South China Market Research** (SCMR). The agency becomes the holding company for SCMR, which has been trading as Research International since 1997. The current management team remains in place.

London-based research firm **Kantar** has acquired U.K. research firm **Retail Marketing Services**.

London media and research firm **Aegis Group plc** has acquired the Scandinavian full-service market research group **Univero**, the holding company for MMI Univero (Norway), TEMO Univero and LUI Univero (Sweden), Vilstrup Univero (Denmark) and Fieldwork Scandinavia.

Separately, Aegis has also acquired **Roland Berger Market Research**, the custom market research subsidiary of Roland Berger Strategy Consultants. Roland Berger Market Research has offices in Munich and Hamburg and employs a staff of 35. Roland Berger Market Research will be integrated with Synovate's existing operations in Germany under the leadership of Harald Hasselmann, current managing director of Roland Berger Market Research. He will split his time between Synovate's Wiesbaden and Munich offices. Martin Wegner, currently managing director of Synovate Germany, will retire from his country management role but take up a new consultancy role for Synovate in Western Europe after a short handover period.

Innovative Concepts Market Research, Carle Place, N.Y., has acquired **A La Carte Research**, Syosset, N.Y. As a result of the acquisition, the name A La Carte Research is being retired.

Alliances/strategic partnerships

The International Mystery Shopping Alliance has added Mexico-based **Big K Mystery Shopping** as a member company.

New York-based **Nielsen Media Research** and **Telemundo Communications Group, Inc.**, Hialeah, Fla., have entered an agreement to include Telemundo in Nielsen's National Television Index (NTI). Prior to this announcement, the Telemundo network only subscribed to Nielsen's National Hispanic Television Index (NHTI), which measures only Hispanic audiences. Telemundo will maintain its current subscription to NHTI until September 2007, when the National People Meter (NPM) sample, upon which NTI is based, will become the sole sample for both English-language and Spanish-language media. The NPM sample is comprised of approximately 10,000 households.

Association/organization news

The U.K.'s Market Research Society (MRS) and the **British Market Research Association** (BMRA) jointly announced their unanimous support for proposals to integrate BMRA services into the MRS beginning in April 2006. Talks have been going on over two years, and specific plans were developed in the recent months by discussion teams representing the two associations. The proposed integration is scheduled to be put to a vote of the BMRA membership early in 2006.

The American Translators Association has named Jiri Stejskal president-elect for a two-year term. Stejskal is founder and president of CETRA, Inc., an Elkins Park, Pa.-based translation firm. He will serve as president-elect from 2005 to 2007 and as the association's president from 2007 to 2009.

Awards/rankings

Ron Kolessar, vice president, technology, **Arbitron Inc.**, New York, is the recipient of the Research Business Report High-Impact Market Research Project Award for 2005. The award recognizes the market research project that most positively affects industry progress and business viability. "Day by day we move closer and closer to what has been called the Holy Grail of market research: single-source data collection. Arbitron's Portable People Meter is poised to accomplish that goal," said Robert Lederer, editor and publisher of the *Research Business Report*, in a press release. "Ron Kolessar has led the development of PPM from the start. This year, when considering all the initiatives propelling the industry forward into new positive directions, there simply was no more fitting recipient for this honor than Mr. Kolessar and the PPM."

For the second year in a row, U.K. research firm **Nunwood** has won *Marketing* magazine's Market Research Agency of the Year 2005.

New accounts/projects

Norway-based research software maker **Future Information Research Management** (FIRM) has signed an agreement to provide its Confirmit Survey and Panel Platform to Carbonview Research Inc., Jupiter, Fla. Carbonview plans to utilize and integrate Confirmit across Internet-based, telephone and personal interviewing research methodologies.

Separately, FIRM announced that ACNielsen, New York, has renewed its licensing of Confirmit.

Salem Communications, a Camarillo, Calif.-based radio broadcasting firm, has selected **Scarborough Research**, New York, for local and national consumer research.

New companies/new divisions/relocations/expansions

Decision Insight has moved to 1000 Walnut, Suite 1500, Kansas City, Mo., 64106. Phone and fax numbers remain the same.

Dallas research firm **Mobile Memoir** has changed its name to Kinesis Survey Technologies.

In Defense of the Focus Group

Abolish the focus group! Shoot the focus group! The two-way mirror is broken! We don't think so.

By John J. Houlahan

Focus group research is the most widely used methodology in marketing research and increasing in usage every year. Yet in spite of demonstrated acceptance, focus groups in all their formats have lately become the most criticized and vilified form of research.

Trade reporters like to expose what "really goes on" in focus groups, believing they have uncovered a "big scoop" on the shabby, almost fraudulent practice of focus research. Speeches with titles such as "The Death of The Focus Group" from marketing consultants claim that focus groups impinge on their role as unquestioned consumer gurus. Innovators of new services that might benefit from replacing traditional focus groups invariably start off by denigrating current practices. Others deride qualitative interviewing as a "quick and dirty" method done only as a poor substitute for the rigor of a well-defined and well-executed quantitative project.

Lately, writer Malcolm Gladwell has taken up a high profile attack on focus groups in his book, Blink, writing that he hoped the book would help "creatives to protect their work from the mocking effect of market research."

Despite all this, almost every marketing research budget includes qualitative research, including such industries as consumer packaged goods, pharmaceutical, financial, high-tech, entertainment, automotive and more. U.S. companies devote approximately 18 percent of their research budget to qualitative research.

The majority of focus research projects in the U.S. take place in over 750 focus facilities and are directed by over 1,000 moderators. Acceptance and usage has increased consistently from 110,000 focus groups and equivalent value IDI sessions in 1990 to more than double the number in 2004 of 233,000 sessions.

And focus research is a globally accepted form of marketing research. In 2004 there were an estimated 257,000 focus groups and equivalent IDI sessions conducted outside the U.S. throughout Europe, Latin America and Asia-Pacific. This makes a worldwide total of almost half a million sessions.

ENDURING POPULARITY

With all the criticism, what accounts for the enduring popularity, acceptance and growth of qualitative research? Following are some reasons.

Focus research is one of the only formal research methodologies that allows clients to experience the real live customer and prospect. In the end, purchasing decisions are the result of complex psychological workings which can best be explored through open discussion with the consumer. Quantitative research methodology, for instance, provides only a numerical representation of such actions.

> Today's corporate culture demands that marketing and advertising personnel know the customer, not as a numerical average, but in all their subtleties, aspirations and motivations.

Qualitative research can provide intimate understanding and valuable insight about the customer not attainable through other research methods. It is uniquely appropriate to determine how products and services fit into the living pattern, mind set, vocabulary and emotional needs of the customer.

While other forms of research such as quantitative and observational methodology surely have their use, traditional focus group research is singularly qualified to fuel and feed the intuition and beliefs of management about the consumer. It allows management to hear their customers and make intuitive leaps to better ways of satisfying and communicating with them. Managers can more confidently chart a course where no statistical roadmap is available. There is recognition that valuable insights are just as valid and important as accurate statistics.

The moderator plays a key role in ensuring that the research is applied and used appropriately. He or she has stewardship of the project, not just in running the groups, but also in project planning, crystallizing objectives, counseling throughout to sharpen the process, reviewing and synthesizing results, and providing an objective interpretive report. A good moderator also knows how to look beyond what is said and to, in Gladwell's term, "thin slice" to the critical factors that make a difference.

KNOW THE CUSTOMER

Today's corporate culture demands that marketing and advertising personnel know the customer, not as a numerical average, but in all their subtleties, aspirations and motivations. In his keynote address to the Advertising Research Foundation Conference in 1998, Robert L. Wehling, senior vice president of global marketing and consumer knowledge at The Procter & Gamble Company, issued the following corporate mandate to researchers: "Know the individual consumer's heart and you will own the future! Get to know this changing consumer personally. Not as an average but as a person." This notion was updated by A.G. Lafley, current P&G CEO in a front page article in the June 1, 2005 Wall Street Journal, "Focus Group. P&G Chief's Turnaround Recipe: Find Out What Women Want."

Wehling and Lafley are but more recent proponents of this philosophy, which goes to the very core of effective marketing research. And the research practice that remains the best way to accomplish this is focus research, the only real methodology that lets you get up close and personal to today's consumer. ■

John J. Houlahan is Founder and Chairman of FocusVision Worldwide, jjhoulahan@focusvision.com

A version of this originally appeared as an article in the October 2003 edition of Quirk's.

Names of Note

continued from page 12

Robin Feuerstein has succeeded **Ron Sugarman**, who has retired as senior vice president and director of New York-based *Interpublic's Center of Marketing Intelligence*.

R.L. Polk & Co. has named four executives to European management positions, adding **Kendra Rawls** as managing director, R.L. Polk Europe; **Dominic Clare** as director, product strategy, R.L. Polk Europe; **Todd Fleischhauer** as country director, United Kingdom; and **Markus Frömgen** as country director, Germany.

Daniel E. Hess has been named vice president/strategic marketing at Chicago-based *Tribune Interactive*.

InsightExpress, a Stamford, Conn., research firm, has named **Lora Feinman** senior account executive, a new position within the company's online ad effectiveness group. **Suzanne Hasbrouck** has joined the firm's media and custom panels group as online media project manager. In addition, **Lisa Fanthorpe-White** has been named customer service representative. She will be located in San Francisco. And **Barbara Wade** has been named director within the company's consumer packaged goods sector.

G & S Research, Carmel, Ind., has named **Randy Boon** and **Yong Zhuge** analytics manager. In addition, **Bonnie Renner** has been named human resources manager.

Chicago-based *Synovate* has added senior-level research executives to its multicultural business, naming **Everett Hernandez** senior vice president and general manager; **Steve Moylan** vice president; **Denise Marks** vice president, research studies; and **Anna Marie Lopez** in-person project field services director. Separately, Synovate has named **Ged Parton** global strategy development director. He will initially be based at Synovate's Glasshouse office in London.

Randy Frantz has joined Redlands, Calif.-based geographic information system firm *ESRI* as manager of telecommunications industry solutions.

Tim Ressmeyer has been appointed to lead Chicago research firm *Mintel International's* U.S. custom solutions team.

The Center for Multicultural Competence in Healthcare Organizations (CMCHO), Cincinnati, has named **Kathleen Gallon** vice president of operations. She will be responsible for developing, executing and managing the survey process for CMCHO, a company which certifies hospitals in multicultural competencies.

2006

Marketing Research

Software Directory >>>

The 2006 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 150 firms and over 350 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, paper/scan, CAPI/CASI, CATI, Web interviewing, 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 84
The software cross-reference tables begin on page 104

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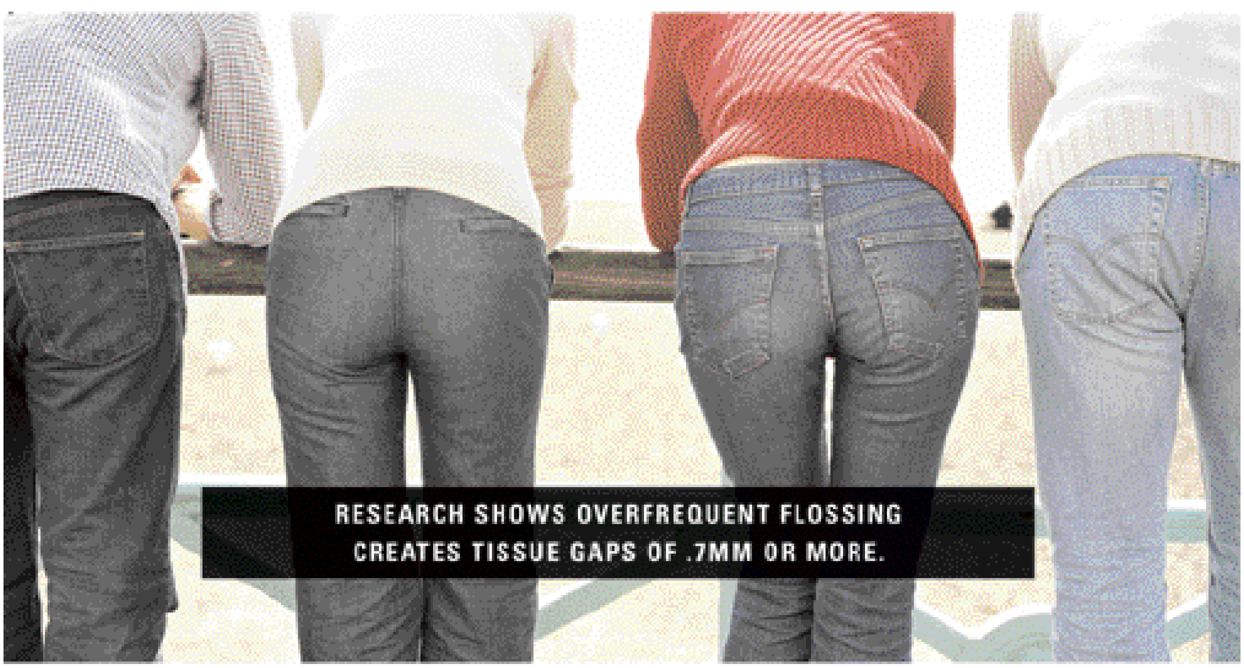

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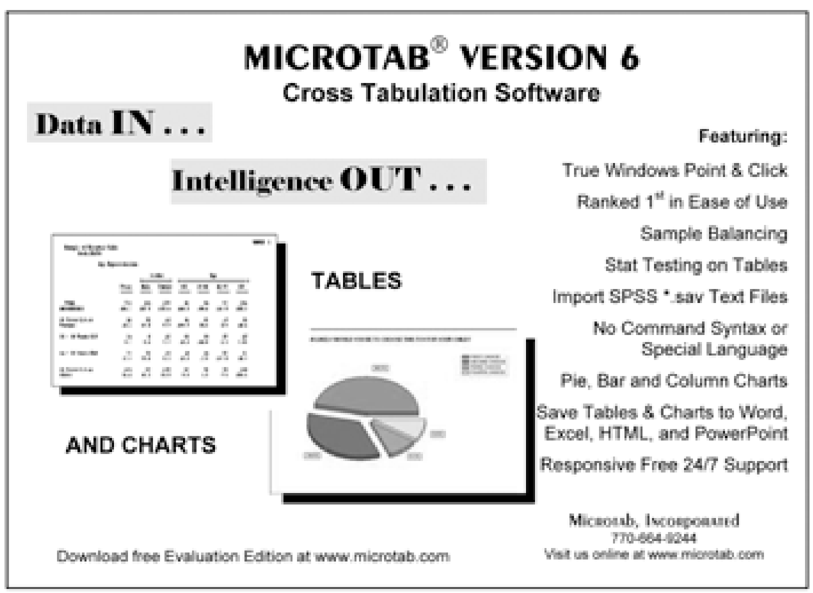

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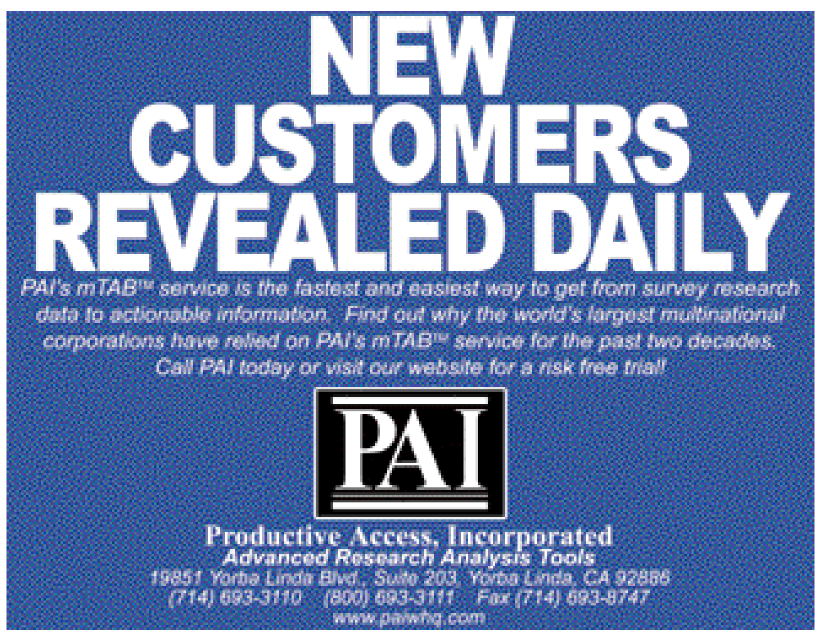

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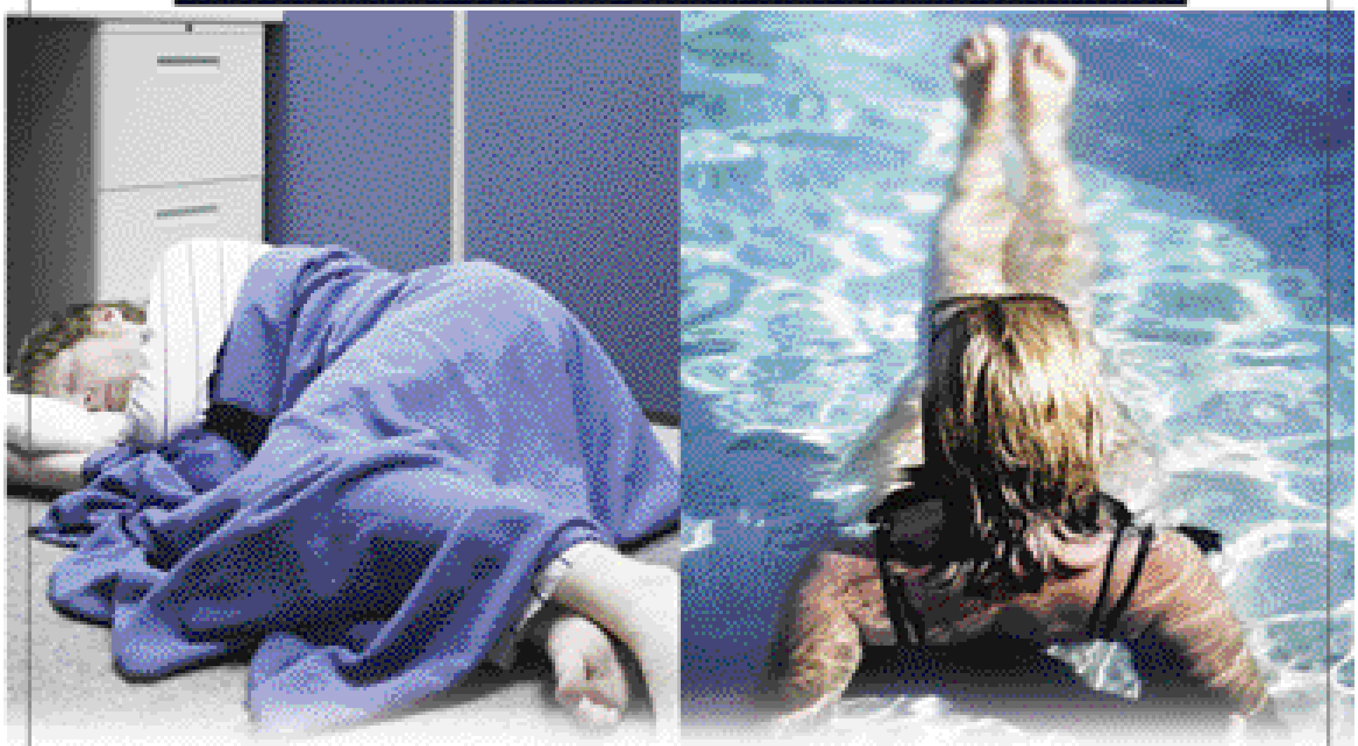

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(See advertisement on p. 27)

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(See advertisement on pp. 96, 98, 100, 101)

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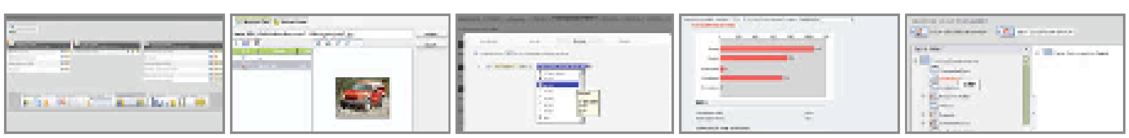

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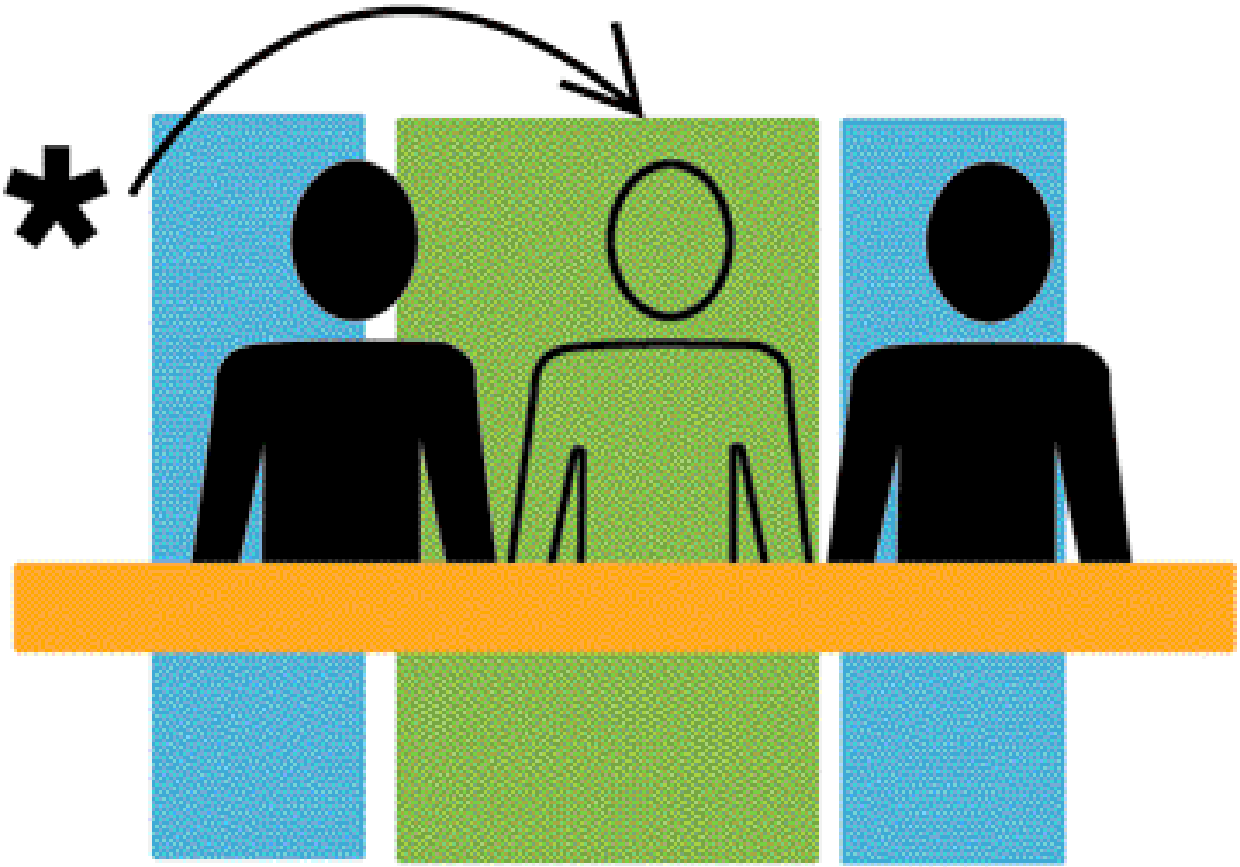

★ What's A Focus Group Without a Moderator?

Our May issue included our first annual directory of focus group moderators.
It contained more than 1,000 moderators at over 800 firms.

If you no longer have your May issue, don't worry – a fully searchable version of
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(See advertisement on this page)

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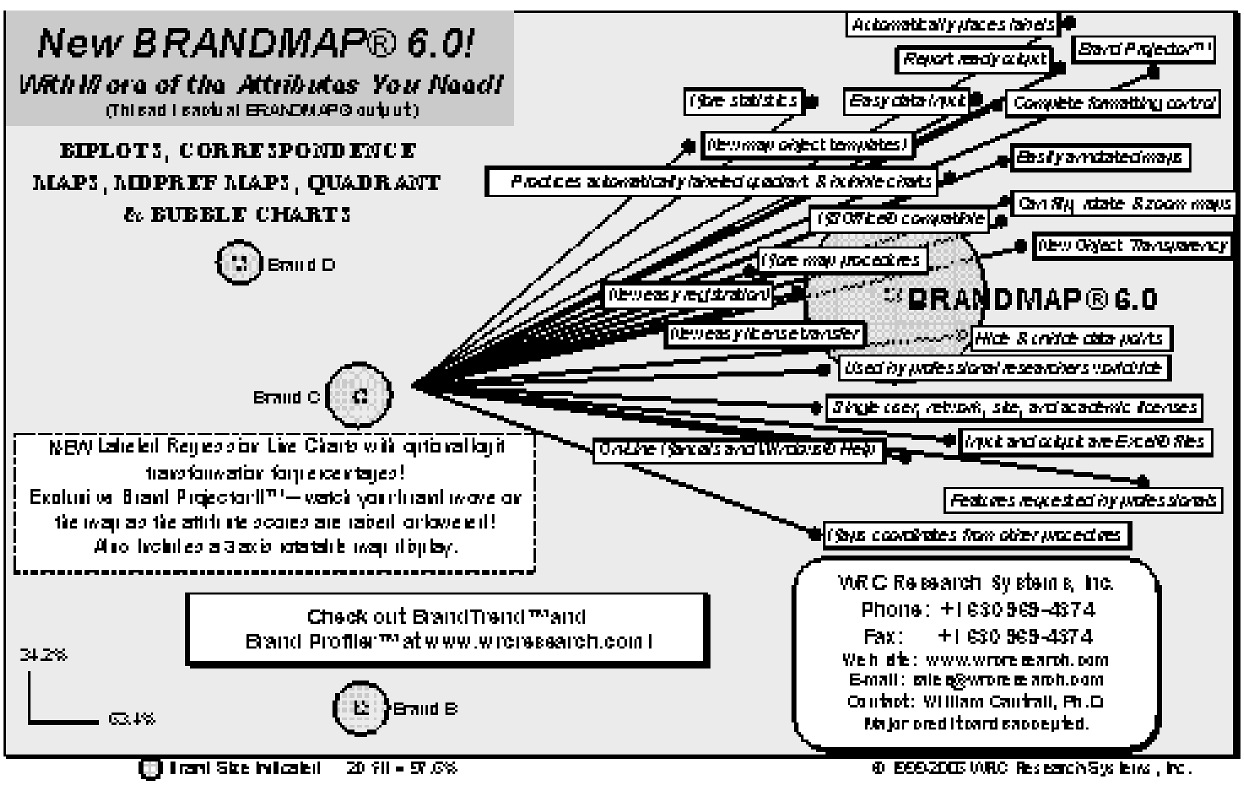

Tabulation Software	Operating System					Tabulation Features							Significance Tests				Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Graphic user Interface or script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
ACA System Sawtooth Software, Inc. p. 96	●				●	GUI			●	●	●	●		●	●			
Answer Tree SPSS Inc. p. 98	●				●	Both	Var			●	●						Buy	$$
ARGUS Perceptual Mapper SPRING SYSTEMS p. 98	●										●							
Askia Analyse ASKIA - Software for Surveys p. 86	●					GUI	Unltd	Unltd	●	●	●		●		●			
CART Salford Systems p. 96	●		●	●		Both	8,192		●	●	●						Buy	$$
CBC System Sawtooth Software, Inc. p. 96	●				●	GUI			●	●	●	●	●	●	●			
CCA System Sawtooth Software, Inc. p. 96	●					GUI	300		●	●	●			●				
Clementine SPSS Inc. p. 98	●		●		●	Both	Unltd		●	●			●	●	●	●	Buy	$$$$
Confirmit FIRM INC. p. 90	●				●	GUI			●	●	●	●						
Conjoint Analysis InsightExpress, LLC p. 91					●	Both	Unltd	Unltd	●	●	●	●		●	●			
CPM System Sawtooth Software, Inc. p. 96						GUI			●	●	●			●				
CVA System Sawtooth Software, Inc. p. 96	●					GUI			●	●	●	●		●	●			
Databeacon Databeacon Inc. p. 88					●	GUI												
DataFriend COMCON - Media p. 87	●					GUI			●	●	●		●	●		●	Lease	$$
Dub InterViewer NEBU b.v. p. 92	●			●	●	GUI	Unltd	Unltd	●	●	●	●	●				Lease	
Eform Beach Tech Corporation p. 86	●				●	Both	Unltd	Unltd	●	●	●	●		●	●	●	Either	
eListen Scantron p. 96	●				●	GUI	Unltd	Unltd	●	●	●							
EQS Structural Equations Modeling Multivariate Software, Inc. p. 92	●		●	●		GUI			●	●	●		●	●	●	●	Either	$$
ESPRI Information Tools Ltd. p. 90	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Buy	$$
E-Tabs Interactive E-Tabs p. 90	●	●			●	GUI			●	●	●	●				●	Lease	$$
E-Tabs Lite Reader E-Tabs p. 90	●					GUI												
E-Tabs Web E-Tabs p. 90	●		●			Both						●					Lease	$$$$
E-Tabs Writer E-Tabs p. 90	●		●			GUI											Lease	$$$
EzMedia Plan New Age Media Systems, Inc. p. 92					●	GUI	Unltd	Unltd	●	●	●	●					Lease	$$$$

$ = $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
FASTAB Ad Hoc Tabulation DATAN, Inc. p. 88	●					Syntax	5,000	Unltd	●	●	●						Lease	$
Flo - Stat Senecio Software, Inc. p. 96		●							●	●	●	●	●	●	●	●		
Forecast Pro Business Forecast Systems p. 86	●					GUI	10	1	●		●						Buy	$
Forecast Pro Unlimited Business Forecast Systems p. 86	●					Both	Unltd	Unltd	●	●	●		●		●		Buy	$$$$
Forecast Pro XE Business Forecast Systems p. 86	●					GUI	100	1	●	●	●		●		●		Buy	$$$
GeoSight Sammamish Data Systems, Inc. p. 96	●					GUI	Unltd	Unltd	●	●	●						Buy	$
Goldminer® Statistical Innovations, Inc. p. 98	●					GUI				●	●	●	●	●		●	Buy	$$
HARMONI Information Tools Ltd. p. 90	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Buy	$$$
Hosted Survey Hostedware p. 90					●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	
IdeaMap®.Net Moskowitz Jacobs Inc. p. 92					●	GUI					●	●						
ImagEntry Viking Software Solutions p. 100	●		●	●		GUI	32,000	32,000									Buy	$$
Impact! Analysis Pattern Discovery, Inc. p. 93																	Lease	
InsightExpress InsightExpress, LLC p. 91					●	Both	Unltd	Unltd	●	●	●	●		●	●		Lease	
InsightPanels InsightExpress, LLC p. 91					●	Both	Unltd	Unltd	●	●	●	●		●	●		Lease	
Internet Survey Machine Marketing Masters p. 91	●	●	●	●	●	GUI	32,000	Unltd									Buy	$$$$
Interview & Analysis Program Comstat Research Corporation p. 87																		
Ioxphere Xorbix Technologies, Inc. p. 103	●	●			●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$
KMRQuest KMR Software p. 91	●												●				Lease	
Latent Gold® Statistical Innovations, Inc. p. 98	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Buy	$$
Latent Gold® Choice Statistical Innovations, Inc. p. 98	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Lease	$$$
MarketSight® Monitor Software p. 92	●				●	GUI	10,000	Unltd.	●	●	●	●	●		●		Either	$$
MARS Salford Systems p. 96	●		●	●		p. 8,192		●	●	●						Buy	$$$$	
MaxDiff/Web Sawtooth Software, Inc. p. 96	●				●	GUI												$$$
MENTOR CfMC Research Software p. 87	●		●	●		Syntax	Unltd	Unltd	●	●	●	●	●		●	●	Lease	

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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
MERLIN Tabulation System DATAN, Inc. p. 88	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$$
MERLINPlus (plus menus) DATAN, Inc. p. 88	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$
MI Pro Research Studio MI Pro p. 92	●					Both	Unltd	Unltd	●	●		●	●			●	Either	
Microtab Version 6 - Professional Edition Microtab, Inc. p. 92	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$$
Microtab Version 6 - Standard Edition Microtab, Inc. p. 92	●					GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$
Microtab Version 6 SPSS Add-on Module Microtab, Inc. p. 92	●					GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$
MktSIM SPRING SYSTEMS p. 98	●										●							
MM4XL 7.0 MarketingStat p. 91	●					GUI	200	Unltd	●	●	●	●	●	●	●	●	Buy	$$
Modern360 Feedback Modern Survey, Inc. p. 92																		
mr Studio SPSS Inc. p. 98	●					Both			●	●		●					Either	$$
mr Tables SPSS Inc. p. 98	●				●	Both				●		●	●		●		Buy	$$$$
MRDCL Marketing and Research Data Cnslts. p. 91	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$$$
mTAB Research Analysis System PAI-Productive Access, Inc. p. 93	●				●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	
NCSS Dataxiom Software, Inc. p. 88	●					GUI	250	Var	●	●	●		●	●	●	●	Buy	$
NCSS NCSS p. 92	●					GUI	1,000	Unltd	●		●		●	●	●	●	Buy	$
NET-MR Tabulation GMI (Global Market Insite, Inc.) p. 90	●		●	●	●	GUI	Unltd	Unltd	●	●	●		●	●	●			
NIPO DIANA NIPO Software p. 93	●				●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Lease	$$$
OnTraq Marketing and Research Data Cnslts. p. 91	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$
PASS Dataxiom Software, Inc. p. 88	●					GUI											Buy	
PEER Forecaster Delphus, Inc. p. 88	●					GUI			●					●	●		Either	$
PEER Planner for Windows Delphus, Inc. p. 88	●					GUI			●	●	●	●	●	●	●	●	Either	$$$$
Postal Carrier Route Polygons Sammamish Data Systems, Inc. p. 96	●						Unltd	Unltd	●	●	●						Buy	$
Power & Precision Dataxiom Software, Inc. p. 88	●					GUI											Buy	$$
P-STAT P-STAT, Inc. p. 93	●		●	●		Both	250,000	Unltd	●	●	●	●	●	●	●		Buy	$$

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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
Pulsar/Pulsar Web Pulse Train Ltd. p. 94	●					GUI	Unltd	Unltd	●	●	●		●		●	●	Either	
QDA Data Analysis Software Tragon p. 100	●					GUI	100				●			●				
QPSMR CATI QPSMR Limited p. 94	●					Both	30,000	30,000	●	●	●	●	●	●	●	●	Lease	$$$$
QPSMR INSIGHT QPSMR Limited p. 94	●					Both	30,000	30,000	●	●	●	●	●	●	●	●	Lease	$$
QPSMR REFLECT QPSMR Limited p. 94	●					Both	30,000	30,000	●	●		●	●	●	●	●		
QPSMR SOLO QPSMR Limited p. 94	●					Both	30,000	30,000	●	●	●	●	●	●	●		Buy	$$
QTAB Jan Werner Data Processing p. 103	●			●		Syntax	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$$
Quantum SPSS Inc. p. 98							Unltd	Unltd	●	●			●		●	●	Buy	$$$$
Quanvert SPSS Inc. p. 98	●					GUI		Var	●	●					●		Buy	$$
QuestionPro QuestionPro.com p. 94					●	GUI	Unltd	Unltd	●			●	●		●		Either	$$
QWRITERII for Windows Your Perceptions p. 103	●					GUI	2,000	200			●						Lease	$
RandomForests Salford Systems p. 96	●		●			Both	8,192		●	●	●						Buy	
Raosoft EZReport Raosoft, Inc. p. 94	●					GUI	Unltd	Unltd	●	●	●		●	●	●	●	Buy	$
Raosoft SurveyWin Raosoft, Inc. p. 94	●					GUI	Unltd	Unltd	●	●			●	●	●	●	Buy	$
Rosetta Studio Rosetta Studio International p. 96	●					GUI		Unltd			●						Either	$$$$
SatisfactionExpress InsightExpress, LLC p. 91					●	Both	Unltd	Unltd	●	●	●	●		●	●		Lease	$$$$
Sensus Web Sawtooth Technologies, Inc. p. 96	●					Both	Unltd	Unltd	●			●					Buy	
Si-Chaid® Statistical Innovations, Inc. p. 98	●					GUI	Unltd	Unltd		●	●		●				Buy	$$
SmartForecasts® Smart Software, Inc. p. 98	●					GUI	Unltd		●	●	●	●	●	●	●	●	Either	$$$$
SNAP Internet Snap Survey Software p. 98	●					GUI			●	●		●	●		●	●	Buy	
SNAP Professional Snap Survey Software p. 98	●					GUI	Unltd	Unltd	●	●	●	●	●		●	●	Buy	
SNAP Results Snap Survey Software p. 98	●					Both	Unltd	Unltd	●	●	●	●	●		●	●		
SNAP Scanning Snap Survey Software p. 98	●					GUI			●	●		●	●		●	●	Buy	
SOLAS Dataxiom Software, Inc. p. 88	●					GUI												

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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
SPSS 14.0 SPSS Inc. p. 98	●	●	●		●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$
SPSS Text Analysis for Surveys SPSS Inc. p. 98	●					GUI											Buy	$$
SSI Web Sawtooth Software, Inc. p. 96	●				●	Both			●	●		●		●	●			
Star Pulse Train Ltd. p. 94	●					Both	Unltd	Unltd	●	●					●	●	Either	
STAT XP VOXCO (Groupe Voxco Inc.) p. 100	●					Both	10,000	Unltd	●	●	●	●	●		●	●	Buy	$$$$
STATISTICA 6 StatSoft, Inc. p. 98	●				●	Both	Var	Var	●	●	●		●	●	●	●	Buy	
STATISTICA 7 StatSoft, Inc. p. 98	●					Both	Var	Var	●	●	●		●	●	●	●	Buy	
StatMost Dataxiom Software, Inc. p. 88	●					GUI	250	Var	●		●		●	●	●	●	Buy	$
StatPac for Windows StatPac, Inc. p. 98	●					Syntax	2,000	Unltd	●	●	●	●	●	●	●	●	Buy	$$
STATS Decision Analyst, Inc. p. 88	●					GUI				●			●					
StyleMap®.Net Moskowitz Jacobs Inc. p. 92					●	GUI					●	●						
SumQuest Survey Software SumQuest Survey Software p. 99	●					GUI	250	Unltd	●	●	●	●	●				Buy	$
SuperCROSS Alta Plana Corporation p. 84	●					GUI	Unltd	Unltd	●	●	●	●	●					
SuperSTAR Alta Plana Corporation p. 84	●		●	●		Both	Unltd	Unltd	●	●	●	●					Either	
Survey Explorer Memphis International p. 91	●					GUI	Unltd	Unltd	●	●			●					
Survey Said for the Web Marketing Masters p. 91	●	●	●	●		GUI											Buy	$$$
Survey Said for Windows Marketing Masters p. 91	●					GUI											Buy	
Survey Select Expert SurveyConnect, Inc. p. 99	●					GUI	Unltd	Unltd			●	●					Buy	$$
SurveyPro Apian Software p. 84	●					GUI	3,000	3,000	●	●	●	●	●				Buy	$$
SurveySolutions Perseus Development Corporation p. 93	●					GUI	Unltd	Unltd	●		●							
Sysurvey.com SySurvey p. 99					●	GUI			●		●	●					Lease	
The Survey Cybernetic Solutions - Survey Software p. 88	●					GUI	1,000	32,000	●	●	●		●	●	●	●		
The Survey System Creative Research Systems p. 88	●					GUI	32,000	5,000	●	●		●	●	●	●	●		$$
The Unscrambler CAMO Smart Software Inc. p. 87	●					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
The Unscrambler Designer CAMO Smart Software Inc. p. 87	●					GUI	Unltd	Unltd	●	●	●			●	●	●		
TPL Tables QQQ Software, Inc. p. 94	●		●	●		Both	Unltd	Unltd	●	●		●					Buy	$$
TreeNet Salford Systems p. 96	●		●	●		Both	8,192		●	●	●						Buy	$$$$
Trial Map SPRING SYSTEMS p. 98	●										●							
Turbo Spring-Stat SPRING SYSTEMS p. 98	●										●		●	●	●	●		
UNCLE Professional The Uncle Group, Inc. p. 100	●					Both	65,534	9,999	●	●	●		●		●		Buy	$$$$
Uncle Reports The Uncle Group, Inc. p. 100	●					GUI	9,999		●	●								$
UNCLE Standard The Uncle Group, Inc. p. 100	●					Both	65,534	9,999	●	●	●		●		●		Buy	$$$$
U-Tab Weeks Computing Services p. 103	●					GUI	Unltd	Unltd	●	●	●	●	●	●	●		Buy	$
VDE Viking Software Solutions p. 100	●		●	●		GUI	32,000	32,000									Either	$$
VDE+Images Viking Software Solutions p. 100	●		●	●		GUI	32,000	32,000									Buy	$$
VOXCO Tab VOXCO (Groupe Voxco Inc.) p. 100	●					GUI	Unltd	Untld	●	●		●	●		●		Either	
Walker Smart Loyalty® System Walker Information p. 100	●		●		●	Both			●	●	●	●			●		Lease	$$$$
WesVar Westat p. 103	●					GUI	Unltd	Unltd	●	●	●		●	●	●	●		
WinCati 4.2 Sawtooth Technologies, Inc. p. 96	●					Both	Unltd	Unltd	●			●					Buy	
WinCATI 4.2 Mixed Mode Sawtooth Technologies, Inc. p. 96	●					Both	Unltd	Unltd	●			●					Buy	
WinCross The Analytical Group, Inc. p. 84	●					Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$$
WordCruncher Hamilton-Locke - Verbatim Analysis p. 90	●					Both			●	●	●	●					Buy	$$
XPro Dataxiom Software, Inc. p. 88	●					GUI	250	Var	●	●	●		●	●	●	●	Buy	$
Zip + 2 Polygons Sammamish Data Systems, Inc. p. 96	●						Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$
Zip Code Polygons Sammamish Data Systems, Inc. p. 96	●						Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$

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

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
ACA System Sawtooth Software, Inc. p. 96	●				●	GUI	●	●	●	●	●			●	●	●	●		
AccessPoint for Market Research Global Bay Mobile Technologies p. 90	●	●	●	●	●	Both	●			●					●			Either	
AskAnywhere Senecio Software, Inc. p. 96	●	●	●	●	●	GUI	●	●		●	●				●			Lease	$$
Askia ASKIA - Software for Surveys p. 86	●						●	●	●	●				●	●	●	●		
Bellview Fusion Pulse Train Ltd. p. 94	●					Both			●	●						●		Either	
Blaise Westat p. 103	●					GUI	●	●	●	●								Buy	
CBC System Sawtooth Software, Inc. p. 96	●				●	GUI	●	●	●	●	●	●		●	●	●	●		
Ci3 System Sawtooth Software, Inc. p. 96	●				●	Syntax	●	●						●	●				
Confirmit FIRM INC. p. 90	●				●	GUI	●	●	●	●		●		●	●	●	●		
Cutom Panel Building Itracks p. 91					●	GUI			●	●				●	●	●	●		
CVA System Sawtooth Software, Inc. p. 96	●					GUI	●	●	●			●		●	●	●	●		
Dub InterViewer NEBU b.v. p. 92	●			●	●	GUI	●	●	●	●					●	●		Lease	
Eform Beach Tech Corporation p. 86	●				●	Both			●	●	●		●	●	●	●	●	Either	
Hosted Survey Hostedware p. 90					●	Both	●			●	●	●		●	●	●	●	Either	
Interviewer VOXCO (Groupe Voxco Inc.) p. 100	●				●	Both	●	●	●	●				●	●	●		Either	$$
IT CATI/CAPI/Web Interview Technology p. 91	●				●	Both	●		●	●					●			Buy	$$$$
Itracks Online CATI Itracks p. 91					●	Both			●					●	●	●	●		
Itracks Online Surveys Itracks p. 91					●	Both				●				●	●	●	●		

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
MaxDiff/Web Sawtooth Software, Inc. p. 96	●				●	GUI	●	●	●	●	●								$$$
MI Pro Research Studio MI Pro p. 92	●					Both	●	●	●	●		●	●	●	●	●		Either	
Mobile Memoir Mobile Memoir, LLC p. 92					●	Both	●			●					●			Either	
MR Interview SPSS Inc. p. 98	●				●	Both	●	●	●	●				●	●	●	●	Either	$$$$
NET-MR Suite GMI (Global Market Insite, Inc.) p. 90	●		●	●	●	GUI	●	●	●	●		●		●	●	●	●		
NIPO Fieldwork System NIPO Software p. 93	●					Both	●	●	●	●	●	●		●	●	●	●	Lease	$$
Online Focus Groups Itracks p. 91					●	GUI				●				●	●	●	●		
Pulse DNA Software Suite Pulse Group p. 94	●			●	●	Both	●	●	●	●	●	●	●	●	●	●	●	Either	
QPSMR CATI QPSMR Limited p. 94	●					Both	●	●	●		●	●		●	●	●	●	Lease	$$$$
Quanquest SPSS Inc. p. 98	●					GUI	●		●	●		●	●	●				Buy	$$
Raosoft EZSurvey Raosoft, Inc. p. 94	●				●	Both	●	●	●	●	●	●		●				Buy	$
Raosoft SurveyWin Raosoft, Inc. p. 94	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$
Results for Research 6.0 RONIN Corporation p. 96	●				●	Both	●	●	●	●								Buy	
SNAP Professional Snap Survey Software p. 98	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	
SSI Web Sawtooth Software, Inc. p. 96	●				●	Both	●	●	●	●	●	●		●	●	●	●		
StatPac for Windows StatPac, Inc. p. 98	●					Syntax			●	●	●	●		●	●	●	●	Buy	$$
SumQuest Survey Software SumQuest Survey Software p. 99	●					GUI			●	●	●	●		●	●	●	●	Buy	$
Survey Genie William Steinberg Consultants, Inc. p. 99	●					GUI				●	●	●		●	●	●	●	Buy	$

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
Survey Genie - Gold William Steinberg Consultants, Inc. p. 99	●					GUI		●		●	●	●		●	●	●	●	Buy	$
Survey Said for the Web Marketing Masters p. 91	●	●	●	●		GUI			●	●	●	●	●	●	●			Buy	$$$
Survey Said for Windows Marketing Masters p. 91	●					GUI			●	●	●	●	●	●				Buy	
Survey Tools For Windows William Steinberg Consultants, Inc. p. 99	●					GUI		●		●	●	●		●	●	●	●	Buy	$
SurveyPro Apian Software p. 84	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$$
SurveySolutions Perseus Development Corporation p. 93	●					GUI				●	●	●		●	●	●	●		
The Survey Cybernetic Solutions - The Survey Software p. 88	●					GUI				●	●	●		●	●	●	●		
The Survey System Creative Research Systems p. 88	●					GUI	●	●	●	●	●	●	●	●					$$
Virtual Call Center Network Itracks p. 91					●	GUI			●	●					●	●	●		
Voxco Command Center VOXCO (Groupe Voxco Inc.) p. 100					●	GUI	●	●	●	●		●	●	●	●	●		Either	
WinCATI 4.2 Mixed Mode Sawtooth Technologies, Inc. p. 96	●					Both			●	●		●	●	●	●	●	●	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. 94	●		GUI	●	●	●	●	●	Add-on	Either	
Confirmit FIRM INC. p. 90	●	●	GUI						Yes		
DDES 7.0 Tragon p. 100	●		GUI						Add-on		
Eform Beach Tech Corporation p. 86	●	●	Both		●	●			Yes	Either	
ExpertScan AutoData Systems p. 86	●		GUI		●	●	●	●	Yes	Buy	$$$
FAQSS Optimum Solutions Corp. p. 93	●		GUI	●	●	●	●	●	Yes	Lease	$$$$
FLIPS Scantron p. 96	●			●	●	●					
Inquisite Web Survey System Inquisite Inc. p. 90	●	●	GUI		●				Yes	Either	$$$$
MI Pro Research Studio MI Pro p. 92	●		Both				●		Add-on	Either	
MR Paper SPSS Inc. p. 98	●		GUI	●	●	●	●	●		Buy	$$
MR Scan/MR Paper SPSS Inc. p. 98	●		Both	●	●	●	●	●	Add-on	Either	$$$$
Pulse DNA Software Suite Pulse Group p. 94	●	●	Both	●			●			Either	
Raosoft SurveyWin Raosoft, Inc. p. 94	●		GUI	●	●				Yes	Buy	$
ReadSoft Documents for Forms ReadSoft, Inc. p. 94	●		GUI	●	●	●	●	●	Add-on	Buy	$$$$
Remark Classic OMR Principia Products p. 93	●		GUI		●	●	●		Yes	Buy	$
Remark Office OMR Principia Products p. 93	●		GUI		●	●			Yes	Buy	$$
Scannable Office AutoData Systems p. 86	●		GUI	●	●	●	●	●	No	Buy	$$$$
SNAP Professional Snap Survey Software p. 98	●		GUI	●	●		●	●	Yes	Buy	
SNAP Scanning Snap Survey Software p. 98	●		GUI	●	●		●	●	Yes	Buy	
SumQuest Survey Software SumQuest Survey Software p. 99	●		GUI						Yes	Buy	$
Survey Genie William Steinberg Consultants, Inc. p. 99	●		GUI						Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc. p. 99	●		GUI						Yes	Buy	$
Survey Said for the Web Marketing Masters p. 91	●		GUI	●					Yes	Buy	$$$
Survey Said for Windows Marketing Masters p. 91	●		GUI	●	●				Yes	Buy	
Survey Select Expert SurveyConnect, Inc. p. 99	●		GUI						Yes	Buy	$$
Survey Tools For Windows William Steinberg Consultants, Inc. p. 99	●		GUI						Yes	Buy	$
SurveyPro Apian Software p. 84	●		GUI		●	●			Yes	Buy	$$
SurveySolutions Perseus Development Corporation p. 93	●		GUI						Yes		
TELEform Scantron p. 96	●			●			●	●			
The Survey System Creative Research Systems p. 88	●		GUI		●				Yes		$$

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. 84	●					●	●	●		Both	●	●	●	Yes	Buy	$$$$
ACA System Sawtooth Software, Inc. p. 96	●				●	●	●			GUI	●	●	●	Yes		
AccessPoint for Market Research Global Bay Mobile Technologies p. 90	●	●	●	●	●	●	●			Both	●	●	●	Yes	Either	
AskAnywhere Senecio Software, Inc. p. 96	●	●	●	●	●	●	●	●		GUI	●	●	●	Yes	Lease	$$
Askia Face ASKIA - Software for Surveys p. 86	●					●				Both	●	●	●			
Bellview CAPI Pulse Train Ltd. p. 94	●					●				Both	●	●	●	Add-on	Either	
CAPI Manager VOXCO (Groupe Voxco Inc.) p. 100	●					●	●	●		Both	●	●	●	Yes	Either	$$
CBC System Sawtooth Software, Inc. p. 96	●				●	●	●			GUI	●	●	●	Yes		
Ci3 System Sawtooth Software, Inc. p. 96	●				●	●	●			Syntax	●	●	●	Yes		
CONVERSO CAPI CONVERSOFT (Axiom Software) p. 88	●					●	●	●		Both	●	●	●	Yes	Either	
CONVERSO CASI CONVERSOFT (Axiom Software) p. 88	●					●	●	●		Both	●	●	●		Either	
CONVERSO Pocket CONVERSOFT (Axiom Software) p. 88	●									Both				Yes	Either	
CVA System Sawtooth Software, Inc. p. 96	●					●	●			GUI	●	●	●	Yes		
Digivey Survey Suiteô Diatouch, Inc. p. 88	●					●	●	●	●	GUI	●	●	●	Yes	Either	$$
Dub InterViewer NEBU b.v. p. 92	●			●	●	●	●	●		GUI	●	●	●	Add-on	Lease	
Eform Beach Tech Corporation p. 86	●				●	●			●	Both	●	●		Yes	Either	
Empathica Customer Experience Mgmt. Sys. Empathica Inc. p. 90					●				●					Yes	Buy	$$$$
Entryware SPSS Inc. p. 98	●						●			GUI				Yes	Buy	$$
Entryware 5.0 Techneos Systems Inc. p. 99	●				●		●			Both				Yes	Lease	$$
eSurveyor 4.0 Open Halogen Software Inc. p. 90	●	●			●	●				GUI		●		Yes	Lease	$$$$
eSurveyor 5.0 Domino Halogen Software Inc. p. 90	●	●			●	●				GUI		●		Yes	Lease	$$$$
Hosted Survey Hostedware p. 90					●		●	●		Both	●	●	●	Add-on	Either	
IdeaMap®.Net Moskowitz Jacobs Inc. p. 92					●	●		●		GUI	●	●	●	Yes		
Interview & Analysis Program Comstat Research Corporation p. 87																
Interviewer CAPI VOXCO (Groupe Voxco Inc.) p. 100	●				●	●	●	●	●	Both	●	●	●	Yes	Either	$$
IT CATI/CAPI/Web Interview Technology p. 91	●				●					Both				Yes	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
MaxDiff/Web Sawtooth Software, Inc. p. 96	●				●					GUI						$$$
MI Pro Research Studio MI Pro p. 92	●					●				Both	●	●	●	Add-on	Either	
Mobile Memoir Mobile Memoir, LLC p. 92					●		●			Both				Yes	Either	
NET-CAPI GMI (Global Market Insite, Inc.) p. 90	●		●	●	●	●	●	●	●	GUI	●	●	●	Yes		
NIPO CAPI System NIPO Software p. 93	●					●	●	●		Both	●	●	●	Add-on	Lease	$$$$
QPSMR CATI QPSMR Limited p. 94	●									Both	●	●	●		Lease	$$$$
QPSMR INSIGHT QPSMR Limited p. 94	●					●	●	●	●	Both	●	●	●	Yes	Lease	$$
Raosoft EZSurvey Raosoft, Inc. p. 94	●				●	●	●	●		Both	●	●	●	Yes	Buy	$
Raosoft InterForm Raosoft, Inc. p. 94	●				●	●				GUI	●	●	●	Yes	Buy	$$$$
Raosoft SurveyWin Raosoft, Inc. p. 94	●					●		●		GUI		●		Add-on	Buy	$
Reform Anyware Mobile Solutions p. 84					●		●		●	GUI	●	●		Yes		
Reply Fleetwood Group, Inc. p. 90	●	●				●				GUI	●	●	●	No		
Results for Research 6.0 RONIN Corporation p. 96	●				●	●	●	●		Both	●	●	●	Yes	Buy	
SmartQ TeleSage, Inc. p. 99	●								●	GUI	●			Add-on	Buy	$$$$
SNAP Professional Snap Survey Software p. 98	●					●	●	●		GUI		●		Yes	Buy	
SSI Web Sawtooth Software, Inc. p. 96	●				●	●	●			Both	●	●	●	Yes		
StyleMap®.Net Moskowitz Jacobs Inc. p. 92					●	●		●		GUI	●	●	●	Yes		
SURVENT CfMC Research Software p. 87	●		●	●	●	●				Syntax	●			Yes	Lease	
Survey Genie William Steinberg Consultants, Inc. p. 99	●					●				GUI				Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc. p. 99	●					●				GUI				Yes	Buy	$
Survey Tools For Windows William Steinberg Consultants, Inc. p. 99	●					●				GUI				Yes	Buy	$
SurveyPro Apian Software p. 84	●					●		●		GUI		●		Yes	Buy	$$
The Survey System Creative Research Systems p. 88	●					●		●		GUI	●	●	●	Yes		$$
The Survey System - CATI Creative Research Systems p. 88	●					●				GUI	●	●	●	Yes		$$$$
Touchview Survey Solution Touchview Survey Solutions p. 100	●						●	●								
WinQuery The Analytical Group, Inc. p. 84	●					●	●	●	●	Both	●	●	●	Yes	Buy	$$$

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

CATI Software	Operating System					Design Tool	CATI Features			Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Graphic user Interface or script	Central Management	Predictive Dialing	Tabulation Analysis Tools	Buy or Lease	Price Range
Askia Voice ASKIA - Software for Surveys p. 86	●					Both	●	●	Yes		
Bellview CATI Pulse Train Ltd. p. 94	●					Both	●	●	Add-on	Either	
Confirmit FIRM INC. p. 90	●				●	GUI	●		Yes		
CONVERSO CATI CONVERSOFT (Axiom Software) p. 88	●					Both	●	●	Yes	Either	
Dub InterViewer NEBU b.v. p. 92	●			●	●	GUI	●	●	Yes	Lease	
Eform Beach Tech Corporation p. 86	●				●	Both			Yes	Either	
Interview & Analysis Program Comstat Research Corporation p. 87											
Interviewer CATI VOXCO (Groupe Voxco Inc.) p. 100	●				●	Both	●	●	Yes	Either	$$
Interviewer VCC (Virtual Call Ctr.) VOXCO (Groupe Voxco Inc.) p. 100	●				●	Both	●	●	Yes	Either	$$
Ioxphere Xorbix Technologies, Inc. p. 103	●	●			●	GUI	●	●	Yes	Either	$$
IT CATI/CAPI/Web Interview Technology p. 91	●				●	Both			Yes	Buy	$$$$
Itracks Online CATI Itracks p. 91					●	Both	●	●	Yes		
MI Pro Research Studio MI Pro p. 92	●					Both	●		Add-on	Either	
NET-CATI GMI (Global Market Insite, Inc.) p. 90	●		●	●	●	GUI	●	●	Yes		
NIPO Fieldwork System for CATI NIPO Software p. 93	●					Both	●	●	Add-on	Lease	$$$$
Pulse DNA Software Suite Pulse Group p. 94	●			●	●	Both				Either	
QPSMR CATI QPSMR Limited p. 94	●					Both	●	●		Lease	$$$$
Quancept CATI SPSS Inc. p. 98			●			GUI	●	●		Either	$$$$
Raosoft EZSurvey Raosoft, Inc. p. 94	●				●	Both	●		Add-on	Buy	$
Raosoft InterForm Raosoft, Inc. p. 94	●				●	GUI	●		Add-on	Buy	$$$$
Raosoft SurveyWin Raosoft, Inc. p. 94	●					GUI	●		Add-on	Buy	$

CATI Software	Operating System					Design Tool	CATI Features			Purchasing	
Software Title/ Company/Listing page#	Win	Mac	Unix	Linux	Web	Graphic user Interface or script	Central Management	Predictive Dialing	Tabulation Analysis Tools	Buy or Lease	Price Range
Results for Research 6.0 RONIN Corporation p. 96	●				●	Both	●	●	Yes	Buy	
SNAP Professional Snap Survey Software p. 98	●					GUI			Yes	Buy	
StatPac for Windows StatPac, Inc. p. 98	●					Syntax			Yes	Buy	$$
SumQuest Survey Software SumQuest Survey Software p. 99	●					GUI				Buy	$
SURVENT CfMC Research Software p. 87	●		●	●	●	Syntax	●	●	Yes	Lease	
Survey Said for the Web Marketing Masters p. 91	●	●	●	●		GUI				Buy	$$$
Survey Said for Windows Marketing Masters p. 91	●					GUI				Buy	
SurveyPro Apian Software p. 84	●					GUI			Yes	Buy	$$
Sysurvey.com SySurvey p. 99					●	GUI			Yes	Lease	
TelAthena TelAthena Systems LLC p. 99											
Telescript Digisoft Computers, Inc. p. 88	●				●	GUI		●	Add-on	Buy	
The Survey Cybernetic Solutions - The Survey Software p. 88	●					GUI	●		Yes		
The Survey System Creative Research Systems p. 88	●					GUI	●		Yes		$$
The Survey System - CATI Creative Research Systems p. 88	●					GUI	●		Yes		$$$$
Virtual Call Center Network Itracks p. 91					●	GUI	●	●	Yes		
WinCati 4.2 Sawtooth Technologies, Inc. p. 96	●					Both	●	●	Yes	Buy	
WinQuery The Analytical Group, Inc. p. 84	●					Both	●	●	Yes	Buy	$$$

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® ARCS® IVR Systems p. 84	●					GUI	Web	●	●	No	●	Either	$$$$
ACA System Sawtooth Software, Inc. p. 96	●				●	GUI	Web	●	●	Yes	●		
AccessPoint for Market Research Global Bay Mobile Technologies p. 90	●	●	●	●	●	Both	Web	●	●	Yes	●	Either	
AskAnywhere Senecio Software, Inc. p. 96	●	●	●	●	●	GUI	Both	●	●	Yes	●	Lease	$$
Askia Web ASKIA - Software for Surveys p. 86	●					GUI		●	●	Yes			
AttentionTracking MediaAnalyzer Software & Research p. 91	●				●	GUI	Web	●	●	Yes	●	Lease	
BayaSoft Custom Development BayaSoft LLC p. 86					●		Both	●	●	Yes		Lease	
BayaSoft RTD - Real Time Data BayaSoft LLC p. 86					●		Both	●	●	Yes	●	Lease	
BayaSoft RTR - Real Time Reporting BayaSoft LLC p. 86					●		Both	●	●	Yes	●	Lease	
BayaSoft SMS - Sample Management Service BayaSoft LLC p. 86					●		Both	●	●	Yes	●	Lease	
Bellview Web Pulse Train Ltd. p. 94	●					Both	Web	●	●	Add-on	●	Either	
Bulletin Board Focus Groups Itracks p. 91					●	GUI	Web	●	●	Yes	●		
CBC System Sawtooth Software, Inc. p. 96	●				●	GUI	Web	●	●	Yes	●		
Clipstream Clipstream p. 87	●		●	●	●	GUI	Web			No		Either	$$
Confirmit FIRM INC. p. 90	●				●	GUI	Both	●	●	Yes	●		
CONVERSO CAWI CONVERSOFT (Axiom Software) p. 88	●					Both	Web	●	●	Yes	●	Either	
Custom Panel Building Itracks p. 91					●	GUI	Web	●	●	Yes	●		
Dub InterViewer NEBU b.v. p. 92	●			●	●	GUI	Web	●	●	Add-on		Lease	
Eform Beach Tech Corporation p. 86	●				●	Both		●	●	Yes		Either	
Empathica Customer Experience Mgmt. System Empathica Inc. p. 90					●		Web	●	●	Yes	●	Buy	$$$$
eQ TeleSage, Inc. p. 99	●					GUI	Both	●	●	Add-on	●	Lease	$$$
eSurveyor 4.0 Open Halogen Software Inc. p. 90	●	●			●	GUI	Web	●		Yes	●	Lease	$$$$
eSurveyor 5.0 Domino Halogen Software Inc. p. 90	●	●			●	GUI	Web	●		Yes	●	Lease	$$$$
eTelescipt Digisoft Computers, Inc. p. 88					●	GUI	Web	●			●	Buy	
Eval Builder Your Perceptions p. 103	●				●	Both	Both	●		Yes	●	Lease	
FlexiQuest Weeks Computing Services p. 103					●	Both	Web	●	●	Add-on	●		
Hosted Survey Hostedware p. 90					●	Both	Both	●	●	Add-on	●	Either	
Hosted Survey Lite Hostedware p. 90					●		Web						
IdeaMap®.Net Moskowitz Jacobs Inc. p. 92					●	GUI	Web	●	●	Yes	●		

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
Inquisite Web Survey System Inquisite Inc. p. 90	●				●	GUI	Web	●	●	Yes	●	Either	$$$$
InsightExpress InsightExpress, LLC p. 91					●	Both	Both	●	●	Yes	●	Lease	
InsightPanels InsightExpress, LLC p. 91					●	Both	Both	●	●	Yes	●	Lease	
InstantSurvey NetReflector, Inc. p. 92					●	Both	Both	●		Yes	●	Buy	
Intellisurvey Intellisurvey, Inc. p. 91					●	Both	Web	●	●	Yes	●		
Internet Research Manager Domestic Data p. 88	●					GUI	Both	●	●	No	●	Lease	$$$$
Internet Survey Machine Marketing Masters p. 91	●	●	●	●	●	GUI	Web	●		Yes	●	Buy	$$$$
Interview & Analysis Program Comstat Research Corporation p. 87													
Interviewer Web VOXCO (Groupe Voxco Inc.) p. 100	●					Both	Web	●	●	Yes	●	Either	$$
Ioxphere Xorbix Technologies, Inc. p. 103	●	●			●	GUI	Both	●	●	Yes	●	Either	$$
IT CATI/CAPI/Web Interview Technology p. 91	●				●	Both				Yes		Buy	$$$$
Itracks Online Surveys Itracks p. 91					●	Both	Web	●	●	Yes	●		
MaxDiff/Web Sawtooth Software, Inc. p. 96	●				●	GUI	Both	●	●	Yes	●		$$$
MI Pro Research Studio MI Pro p. 92	●					Both	Web	●	●	Add-on	●	Either	
Mobile Memoir Mobile Memoir, LLC p. 92					●	Both	Web		●	Yes	●	Either	
MR Interview SPSS Inc. p. 98	●				●	Both	Both	●	●	Yes		Either	$$$$
NET-Survey GMI (Global Market Insite, Inc.) p. 90	●		●	●	●	GUI	Web	●	●	Yes	●	Either	
NIPO Web Fieldwork System for Web NIPO Software p. 93	●					Both	Both	●	●	Add-on	●	Lease	$$
Online Focus Groups Itracks p. 91					●	GUI	Web	●	●	Yes	●		
Opinio ObjectPlanet AS p. 93	●	●	●	●	●		Both	●		Yes	●	Either	$
OPST (Online Panel Site Tool) Globalpark GmbH p. 90					●	Both	Both	●	●	Yes	●	Lease	$$$
Panel+ Vision Critical p. 100					●	GUI	Web	●	●	Yes	●	Lease	$$
QueryWeb The Analytical Group, Inc. p. 84	●					Both	Web	●	●	Yes	●	Buy	$$$$
QuestionPro QuestionPro.com p. 94					●	GUI	Web	●	●	Yes	●	Either	$$
Raosoft EZSurvey Raosoft, Inc. p. 94	●				●	Both	Both	●		Add-on	●	Buy	$
Raosoft InterForm Raosoft, Inc. p. 94	●				●	GUI	Web	●		Add-on		Buy	$$$$
RelevantView RelevantView, LLC p. 94	●				●	GUI	Web	●	●	Yes	●		
Remark Web Survey Professional Principia Products p. 93	●					Both	Both	●				Buy	$$
Remark Web Survey Standard Principia Products p. 93	●					Both	Both	●		Yes		Buy	$$

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
Research Reporter Insight Marketing Systems Pty. Ltd. p. 90					●			●	●	Add-on	●	Either	$$$$
Results for Research 6.0 RONIN Corporation p. 96	●				●	Both	Web	●	●	Yes	●	Buy	
SatisfactionExpress InsightExpress, LLC p. 91					●	Both	Both	●	●	Yes	●	Lease	$$$$
Sensus Web Sawtooth Technologies, Inc. p. 96	●					Both	Web	●	●	Yes		Buy	
SNAP Internet Snap Survey Software p. 98	●					GUI	Both	●	●	Yes	●	Buy	
SNAP Professional Snap Survey Software p. 98	●					GUI	Both	●	●	Yes	●	Buy	
SSI Web Sawtooth Software, Inc. p. 96	●				●	Both	Both	●	●	Yes	●		
StatPac for Windows StatPac, Inc. p. 98	●					Syntax	Both	●		Add-on		Buy	$$
StyleMap®.Net Moskowitz Jacobs Inc. p. 92					●	GUI	Web	●	●	Yes	●		
SumQuest Survey Software SumQuest Survey Software p. 99	●					GUI	Both			Yes		Buy	$
Survey Console QuestionPro.com p. 94					●	GUI	Both	●	●	Yes	●	Lease	$
Survey Genie - Gold William Steinberg Consultants, Inc. p. 99	●					GUI	Both			Yes		Buy	$
Survey Said for the Web Marketing Masters p. 91	●	●	●	●		GUI	Both			Yes		Buy	$$$
Survey Said for Windows Marketing Masters p. 91	●					GUI	Both			Yes		Buy	
Survey Select Expert SurveyConnect, Inc. p. 99	●					GUI	Both	●		Yes		Buy	$$
Survey Tools For Windows William Steinberg Consultants, Inc. p. 99	●					GUI	Both			Yes		Buy	$
surveyNgine.com Database Sciences, Inc. p. 88					●					Yes			
SurveyPro Apian Software p. 84	●					GUI	Both	●	●	Yes	●	Buy	$$
SurveySolutions Perseus Development Corporation p. 93	●					GUI	Both	●	●	Yes			
SurveyWriter SurveyWriter® p. 99					●	GUI	Web	●	●	Yes	●	Either	$
Sysurvey.com SySurvey p. 99					●	GUI	Both	●	●	Yes	●	Lease	
The Survey Cybernetic Solutions -Survey Software p. 88	●					GUI	Both	●		Yes			
The Survey System Creative Research Systems p. 88	●					GUI	Both	●	●	Yes	●		$$
The Survey System - Web Creative Research Systems p. 88	●					GUI	Both	●	●	Yes	●		$$
Ultimate Survey Prezza Technologies, Inc. p. 93	●					GUI	Both	●	●	Add-on	●	Buy	$$
VantagePoint NetReflector, Inc. p. 92	●					Both	Both	●		Yes	●	Buy	
Walker Smart Loyalty® System Walker Information p. 100	●		●		●	Both	Web	●		Yes	●	Lease	$$$$
WebSURVENT CfMC Research Software p. 87	●		●	●	●	Both	Web	●	●	Add-on	●	Lease	
WebSurveyor 5.0 WebSurveyor Corporation p. 100	●					GUI	Both	●	●	Yes	●	Buy	$$
Zoomerang zPro Zoomerang p. 103					●	GUI	Web	●	●				

Miscellaneous Software Software Title/ Company/Listing page#	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tag-line Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling Systems	Translation	Web Usability
ARCS® ARCS® IVR Systems p. 84												●					
Arthur The Analytical Group p. 84			●														
2D VOG SensoMotoric Instruments p. 98	●																
3D VOG SensoMotoric Instruments p. 98	●																
AccessPoint for Market Research Global Bay Mobile Technologies p. 90	●							●	●								
ARC GIS9 Business Analyst ESRI p. 90							●										
ARGUS Perceptual Mapper SPRING SYSTEMS p. 98					●	●											
ASDE Survey Sampler - Canada ASDE Survey Sampler p. 84															●		
ASDE Survey Sampler - USA ASDE Survey Sampler p. 84															●		
BrandMap WRC Research Systems, Inc. p. 103					●												
BrandProfiler WRC Research Systems, Inc. p. 103					●												
BrandTrend WRC Research Systems, Inc. p. 103				●													
Bulletin Board Focus Groups Itracks p. 91											●						
CAPI Manager VOXCO (Groupe Voxco Inc.) p. 100								●									
CART Salford Systems p. 96					●												
Claritas BusinessPoint Claritas Inc. p. 87		●		●	●	●											
Clementine SPSS Inc. p. 98					●												
Clipstream Clipstream p. 87											●						●
Community Coder ESRI p. 90		●					●										
ConsumerPoint Claritas Inc. p. 87				●	●	●	●										
Custom Panel Building Itracks p. 91											●						
Data Tailor MDSS p. 91		●						●	●								
DataFit/DataFit X Oakdale Engineering p. 93					●												
DecisionPad Apian Software p. 84						●											
DialQ TeleSage, Inc. p. 99														●			

Miscellaneous Software Software Title/ Company/Listing page#	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tag-line Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling Systems	Translation	Web Usability
Dub Planner NEBU b.v. p. 92								●				●					
DynaMap/Census Tele Atlas p. 99							●										
East 3.0 Cytel Inc. p. 88						●											
ESPRI Information Tools Ltd. p. 90					●	●											
E-Tabs Enterprise E-Tabs p. 90				●													
E-Tabs Interactive E-Tabs p. 90				●	●												
E-Tabs Lite Reader E-Tabs p. 90				●		●											
E-Tabs Professional Reader E-Tabs p. 90				●													
E-Tabs Web E-Tabs p. 90				●		●											
E-Tabs Writer E-Tabs p. 90				●		●											
Eval Builder Your Perceptions p. 103	●																
EzMedia Plan New Age Media Systems, Inc. p. 92				●	●												
GENESYS Sampling Systems GENESYS Sampling Systems p. 90															●		
Goldminer® Statistical Innovations, Inc. p. 98					●												
HARMONI Information Tools Ltd. p. 90					●	●											
Headliner® Austin NameStormers p. 86										●							
iMARK Claritas Inc. p. 87				●	●	●	●	●									
iMARK Online Claritas Inc. p. 87				●	●	●	●	●									
InsightPanels InsightExpress, LLC p. 91								●							●		
Ioxphere Xorbix Technologies, Inc. p. 103	●																●
IPSS Senecio Software, Inc. p. 96							●										
iViewX SensoMotoric Instruments p. 98	●																
iXPRESS Claritas Inc. p. 87				●	●	●	●										
KMRQuest KMR Software p. 91					●	●	●										
Latent Gold® Statistical Innovations, Inc. p. 98					●												

Miscellaneous Software Software Title/ Company/Listing page#	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tag-line Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling Systems	Translation	Web Usability
Latent Gold® Choice Statistical Innovations, Inc. p. 98					●												
LogXact Cytel Inc. p. 88						●											
M-Link The Analytical Group p. 84			●														
MapInfo Professional/MapX MapInfo Corporation p. 91							●										
Maptitude Caliper Corporation p. 86							●										
Maptitude for Redistricting Caliper Corporation p. 86							●										
Maptitude for the Web Caliper Corporation p. 86																	●
MARS Salford Systems p. 96						●											
MENTOR CfMC Research Software p. 87		●			●												
MI Pro Research Studio MI Pro p. 92	●	●		●		●	●	●									●
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MktSIM SPRING SYSTEMS p. 98						●											
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Modern360 Feedback Modern Survey, Inc. p. 92											●						
MPE Data Entry & Editing DATAN, Inc. p. 88					●												
mr Studio SPSS Inc. p. 98		●		●													
MR Translate SPSS Inc. p. 98																●	
MRDCL Marketing and Research Data Consultants p. 91		●															
mTAB Research Analysis System PAI-Productive Access, Inc. p. 93					●	●											
NamePro® Austin NameStormers p. 86										●							
Net-DB GMI (Global Market Insite, Inc.) p. 90											●						
NET-Focus GMI (Global Market Insite, Inc.) p. 90											●						

Miscellaneous Software Software Title/ Company/Listing page#	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tag-line Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling Systems	Translation	Web Usability
NET-MR Tabulation GMI (Global Market Insite, Inc.) p. 90															●		
Net-Panel GMI (Global Market Insite, Inc.) p. 90								●									
Online Focus Groups Itracks p. 91									●								
OnTraq Marketing and Research Data Consultants p. 91		●															
Panel+ Vision Critical p. 100									●			●					
PASS Dataxiom Software, Inc. p. 88															●		
PCensus Tetrad Computer Applications, Inc. p. 100							●										
PEER Forecaster Delphus, Inc. p. 88						●											
PEER Planner for Windows Delphus, Inc. p. 88						●											
Perception Analyzer MSInteractive - Perception Analyzer p. 92	●																
Postal Carrier Route Polygons Sammamish Data Systems, Inc. p. 96							●										
Power & Precision Dataxiom Software, Inc. p. 88															●		
PrefSolv Decision Support Sciences p. 88					●												
Pronto Telephony Solutions VOXCO (Groupe Voxco Inc.) p. 100														●			
PRO-T-S® Telephony Systems PRO-T-S® Telephony Systems p. 93														●			
P-STAT P-STAT, Inc. p. 93		●				●									●		
Pulse DNA Software Suite Pulse Group p. 94		●		●					●				●				
QBAL Jan Werner Data Processing p. 103															●		
QGEN Jan Werner Data Processing p. 103		●															
QPSMR REFLECT QPSMR Limited p. 94						●											
Qualboard 20/20 Research - Online p. 100											●						
QuestionPro QuestionPro.com p. 94						●					●						
Quick Tally Quick Tally Audience Response Systems p. 94	●																
Raosoft EZReport Raosoft, Inc. p. 94					●	●											
Raosoft EZSurvey Raosoft, Inc. p. 94						●											

Miscellaneous Software Software Title/ Company/Listing page#	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tag-line Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling Systems	Translation	Web Usability
Raosoft InterForm Raosoft, Inc. p. 94						●											
Raosoft SurveyWin Raosoft, Inc. p. 94						●											
Reflect Marketing and Research Data Consultants p. 91				●		●											
RelevantView RelevantView, LLC p. 94																	●
Reply Fleetwood Group, Inc. p. 90	●					●											
Report Direct Marketing and Research Data Consultants p. 91				●													
Research Reporter Insight Marketing Systems Pty. Ltd. p. 90				●	●	●		●									
Research Tracker II MDSS p. 91							●	●	●						●		
Research Tracker II for Medical Respondents MDSS p. 91							●	●	●						●		
RV2 Able Software Corp. p. 84							●										
SegmentSolv Decision Support Sciences p. 88					●												
SendQ TeleSage, Inc. p. 99				●		●											
Si-Chaid® Statistical Innovations, Inc. p. 98					●												
SmartForecasts® Smart Software, Inc. p. 98		●				●											
Snap3 Snap Software p. 98						●											
Snapline Snap Software p. 98						●											
Snaptrac Snap Software p. 98						●											
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Software G4 Rogator AG p. 96												●					
SOLAS Dataxiom Software, Inc. p. 88															●		
Sp-Link The Analytical Group p. 84			●														
SSI - SNAP Survey Sampling International p. 99															●		
Statistics Calculator StatPac, Inc. p. 98						●											
StatXact Cytel Inc. p. 88						●											
StatXact Procs for SAS Users Cytel Inc. p. 88						●											

Miscellaneous Software Software Title/ Company/Listing page#	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tag-line Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling Systems	Translation	Web Usability
SuperCROSS Alta Plana Corporation p. 84				●	●	●											
SuperSTAR Alta Plana Corporation p. 84		●		●		●											
SuperWeb Alta Plana Corporation p. 84				●		●											
Surview Sales Development Bruce Bell & Associates, Inc. p. 86						●											
Tactician Online Tactician Corporation p. 99							●										
The Rite Site Easy Analytic Software, Inc. p. 88								●									
TransCAD Caliper Corporation p. 86							●										
Trial Map SPRING SYSTEMS p. 98						●											
Turbo Spring-Stat SPRING SYSTEMS p. 98					●	●											
USORT The Uncle Group, Inc. p. 100		●															
U-Tab Weeks Computing Services p. 103				●	●												
VantagePoint NetReflector, Inc. p. 92						●											
Vertical Mapper Tetrad Computer Applications, Inc. p. 100							●										
Virtual Call Center Network Itracks p. 91								●									
Voxco Command Center VOXCO (Groupe Voxco Inc.) p. 100								●						●			
WinLink The Analytical Group p. 84			●														
WordCruncher Hamilton-Locke, Inc. - Verbatim Analysis p. 90	●	●		●		●	●										
Zip + 2 Polygons Sammamish Data Systems, Inc. p. 96							●										
Zip Code Polygons Sammamish Data Systems, Inc. p. 96							●										
Zipfind Xionetic Technologies, Inc. p. 103							●										
Zoomerang zSample Zoomerang p. 103												●			●		

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Coming in March...

Business-to-business research issue

> A look at the research behind the WD-40 No-Mess Pen

> Recruiting for B2B research

> Tips on conducting face-to-face executive interviews

continued from page 130

began asking questions about the size of their department, etc. So the firm turned instead to an online panel of fire and law enforcement personnel, which enjoys a healthy response rate and provides a valuable, ongoing method of tracking attitudes and identifying potential new product needs. Incentives are donated to four non-profits, rather than paid to respondents, due to ethical concerns about government personnel receiving cash.

Metz also told tales of the fire training that Motorola employees went through to get a small taste of the kinds of situations the product's users might face – talk about going above and beyond the call of duty!

TiVo feels the love

Elissa Lee of TiVo Inc. offered several good guidelines for improving the status of the research function within a company: triangulate with other kinds of research (that is, draw in helpful or interesting findings from other research projects that may enhance the one you're working on); iterate – build off of prior learnings rather than reinventing the wheel with each project; fit research into the rapid pace of your company's business (be thorough but don't make research the one part of the process that slows everything down); remember the big picture; present findings in a compelling way; and follow up on research projects and findings to learn from them and provide historical reference points for later use.

The topic of her presentation was research strategies for "developing a product that people love" and the love was clearly evident in the Q&A session following her speech. Enthusiastic TiVo users in the audience probed her for inside information on what fun, new capabilities the company might be unveiling soon. Being the good soldier, she kept her answers vague but the TiVo fans clearly enjoyed being able to gush about the "life-changing" power (as one person put it) of TiVo.

"Focus groups should be banned"

On the conference's final morning, the buzz in the auditorium prior to Malcolm Gladwell's arrival was one of giddy anticipation. This, after all, was the man who had published an article in *Ad Age* titled "Focus Groups Should Be Abolished."

He didn't waste any time – some of the first words out of his mouth were: "I want to talk to you about why focus groups should be banned." But after that initial controversial salvo, he spent the balance of his time laying out a convincing, reasoned argument that should serve as a call to action rather than a call to arms.

One of his problems with focus groups is that we humans don't always know what really motivates us. When put on the spot to explain our actions, as we are in a focus group setting, we come up with stories that, while they may sound reasonable, aren't accurate reflections of our true motivations. Therefore, there is no reason to take a respondent's comments in a focus group at face value. The important, and sometimes missing, aspect of the focus group process is the analysis of the respondents' words.

Further, the act of asking someone to explain what they believe changes what that person believes, Gladwell said. And asking people to explain their choices pushes them toward choices that are conventional and familiar because those choices are the easiest to explain.

For these and other reasons, Gladwell feels focus groups and other forms of research are not good for assessing the potential of revolutionary products, such as Herman Miller's Aeron chair or the TV shows *All In the Family* and *The Mary Tyler Moore Show*, all of which tested quite poorly, as he outlined in *Blink*. Each was ahead of its time/too new/too different and each ended up being wildly successful. With anything that's shocking or different, it simply takes more time for people to determine how they truly feel, in Gladwell's opinion. "The problem with market research," he wrote in *Blink*, "is that often it is simply too blunt an instrument to pick up this distinction between the bad and the merely different."

So different rules apply to researching and marketing breakthrough products, he told the crowd in San Francisco. Management must trust the people who develop the products. Their instincts need to be honored and there must be room to accept their words and thoughts. And companies must be patient when dealing with products or ideas that are out of the mainstream because consumers need time to figure out what/how they feel about them.

Research is not a science, he said, it is an art. The key to using it successfully is to add more creativity, analysis and insight to the process. Researchers need to "listen in a different way."

Perhaps in response to Gladwell's measured tone, the panel discussion following his talk was fairly good-natured and respectful. No one truly took him to task or called him out. Rather, many of the comments seemed to echo Gladwell's ideas. Panelist David Weinberger of The Home Depot for example talked about how the industry needs to get back to the psychological roots of the focus group process, to really be able to understand human psychology and motivation. The terms "focus group" and "predict" are oxymoronic, he said.

The talk ventured away from the focus group fracas to Gladwell's concept of "thin-slicing" – the act of making snap judgments based on our unconscious mind's ability to sift "through the situation in front of us, throwing out all that is irrelevant while we zero in on what really matters." Thin-slicing is an interesting concept but the assembled panelists – including Bill Dowell, one of the Herman Miller researchers whom Gladwell quoted in *Blink* – all seemed to agree that no major corporation wants to make huge decisions based on gut feel. But, to Gladwell's point, certainly when the decisions pertain to a new or different product, a certain leap of faith, for lack of a better term, is sometimes needed. Having some research to serve as a springboard for that leap can't hurt, but the company can't be afraid to rely on the knowledge and expertise of its employees. Customers should have their say but they can't be the final arbiters. |Q trade talk

By Joseph Rydholm
Quirk's editor

All was well with Gladwell

This month, to finish my four-part series of conference wrap-ups, I focus on the 2005 IIR Market Research Event, which took place in San Francisco in November. I'm sure I sound like a broken record each time I write about this conference but it's hard to find new ways to say the same thing: This event just keeps getting better and better.

The 2005 edition added some star power to the dependably solid lineup of research presentations: Attendees got to dine with former Hewlett-Packard CEO Carly Fiorina and hear *Blink* author Malcolm Gladwell defend his distaste for focus groups. Fiorina and Gladwell were interesting (more on Gladwell later) but the real star for me was Gayle Lloyd of FedEx, who gave one of the most rousing talks I have ever seen at a research conference.

In 45 all-too-brief minutes she outlined how, in her 18 months at FedEx, she helped raise the status of researchers from order takers to decision makers. After company execs slammed the research department for not being business-oriented, she and the nine researchers who report to her had to decide how to market and define themselves. In-house interviews were conducted to further understand the perceptions of the research department and its procedures and based on the findings, substantive changes were made.

To lend some efficiency and accountability to the research process, Lloyd and her team set up a tracking database, assigning each project an ID number and logging the date it was started, its name, the analyst assigned to it and the client who commissioned it. They also instituted a new set of procedures for project development. Previously, internal clients would often come to the MR department with demands such as "I want to do focus groups" - without having analyzed whether focus groups were the best methodology for the project at hand. Under the new system, internal clients have to come prepared to have a conversation - a consultation session - about the project to determine which methods to use. To avoid duplicating research efforts, the research consultant must go back to the client with a précis of past research from the company database and determine if existing research can be used to address the current need.

UPS used to bill itself as the "tightest ship in the shipping business." After hearing Lloyd's presentation, I'd be willing to bet that FedEx now has the tightest research ship in the shipping business.

IM works for teen research

For those of you who need to talk to a teen/young adult audience, Lewis Oberlander from Warner Bros. reported that his firm has had success using AOL's Instant Messenger (IM) to test movie concepts and ad spots with teens. Four online groups were held in 2004 during which respondents were shown movie trailers and other visual material for upcoming 2005 films. They then offered their feedback via the IM method. Traditional research was conducted later on the same subject matter and Oberlander said that the results from both methods were similar. There were some glitches for respondents when viewing the visual stimuli but overall it's a method he would use again. Kids are comfortable IMing so using it as a vehicle for conducting research puts them at ease and also helps make the process fun, Oberlander said.

Researchers in fire training?

Maria Townsend-Metz of Motorola's government and enterprise mobility solutions unit gave a fascinating talk on the development of Motorola's Firegrounds Communications System, a mobile communications system developed to enhance the safety and security of emergency responders at fire or disaster scenes. Metz described some of the hurdles her unit faced when trying to conduct research. For example, early attempts at phone interviews weren't too successful, given that respondents were public safety officials, who were understandably wary in this post-9/11 world when interviewers

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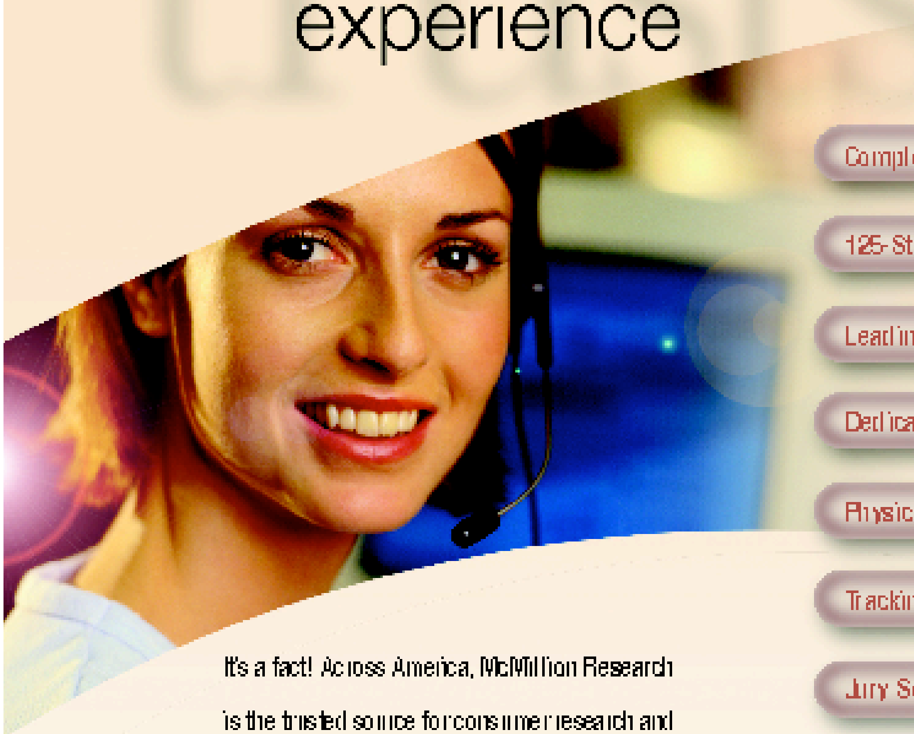

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