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Marketing Research Review

FEBRUARY 2007

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in case you missed it...

news and notes on marketing and research

Sony turned to research to fine-tune its holiday offerings

A December article from the elitestv.com Web site reported on Sony Electronics' wide use of research in developing products for the 2006 holiday season.

Through a variety of research initiatives, including surveys, focus groups, on-site interviews with customers at various locations, syndicated and communications research, metrics tracking and customer relationship management, Sony asked consumers what they expected from its products. "We want to combine consumer insight from market research with strong engineering minds to market innovative products that consumers will want to give as gifts," said Chris Gaebler, vice president of marketing and strategy for Sony Electronics in the U.S. "This research is essential for us to continue to provide products that bring joy to people's lives. We want our customers to know they have a voice and we are listening."

According to Gaebler, consumer feedback led to key product design or marketing changes that made certain products more appealing and user-friendly. For example, consumer focus groups in the U.S. reviewing a preliminary design for the Sony Reader found the multitude of buttons made navigating a bit difficult, and that the alkaline batteries originally specified to power the unit were cumbersome. Sony engineers made changes based upon this input in the final design, including replacing alkaline batteries with rechargeable ones, and a simpler button configuration.

Sony television designs benefited from consumer feedback as well. Consumer research helped the company determine the sizes to manufacture of its rear-projection televisions as well as which colors were most popular for its BRAVIA LCD TV color bezel options.

More than 850 consumers tested Sony's new mylo personal communicator, providing feedback through focus groups and an online survey. This information helped determine the target consumers for the product, how they would use it, what features they would use, what additional features they would like, and whether the purpose of the product is clear.

Learning about consumers' lifestyles was also important to product development. For its latest line of Cyber-shot digital cameras, Sony researched how consumers share their digital photos, including how they print, store and download them. Focus groups were also used to help determine which colors the cameras should be made available in. As a result, red was offered as a color option for the DSC-T50 Cyber-shot model.

Feedback from women customers, who now represent more than half of the consumer electronics purchasing power, was extremely beneficial to Sony, especially in readying the SonyStyle stores, which were designed with the female shopper in mind, for the holiday season.

"Consumer Research Guides Sony Product Design for the Holidays," elitestv.com

Quick-service grew fast in Vegas

According to Port Washington, N.Y., researcher the NPD Group, Las Vegas was the fastest-growing market for quick-service restaurants in 2006. The NPD ranking is based on the percent increase in restaurant units from 2004 to 2006, among the 39 largest markets in the country. The top five fastest-growing markets for quick-service restaurant units (of the top 39 largest markets in the U.S.) from 2004-2006 were: Las Vegas; Phoenix; Charlotte, N.C.; Sacramento, Calif.; and Raleigh, N.C.

As of 2006, 57 percent of Las Vegas restaurant units are quick-service (six percentage points above average). Quick-service operators in Las Vegas appear to be attracting important consumer groups, mainly adults 35-49 years old (23 percent of Las Vegas' population) and consumers from households earning a total annual income of $75,000 and above (29 percent of Las Vegas' population).

Another reason why quick-service restaurants may be doing so well in Las Vegas is that customer loyalty appears to be higher than in other markets. Loyal consumers who "always/regularly go there" ranked 20 percent higher for Las Vegas quick-service restaurants than the top 39 markets. "We hear a lot about the development and caliber of fine-dining restaurants in Las Vegas," said Julie Travis, product manager of the NPD Group. "However, there is also a large portion of the restaurant community that is expanding to meet residents' and tourists' needs for convenient, affordable and diverse meal options."

It is not just traditional categories that are gaining ground. Specialty-oriented restaurant concepts are leading the pack; 87 new units were added for quick-service gourmet coffee/tea in the past two years. In comparison, quick-service hamburger, pizza/Italian and Mexican added 59 units combined during this time.

Perhaps research can help Sony recover from this blunder

In a cautionary tale for marketers everywhere, PROMO Xtra's Betsy Spethmann reported in December on how Sony Electronics was forced to shut down a stealth blog for its PSP video game system after a nasty backlash ensnared Sony and its agency, Zipatoni.

The blog was heavily criticized in its own comments section and on other gaming-related sites for trying to dupe consumers into thinking that its fictitious author, Charlie, and his Cousin Pete were real.

In comments at the site, gamers bristled at the blog's hip-hop slang and an intentionally amateurish video that showed the two 20-something white men rapping about getting a PSP from mom and dad for Christmas.

The site, AllIWantforXmasisaPSP.com, went dark on December 14. The video continued to reside on YouTube, where Sony first seeded it and at least a handful of YouTube visitors reposted it.

Sony and Zipatoni were outed on the blog itself by tech-savvy critics who reportedly found the blog's registration data through an online search and tracked it back to Gregory Meyerkord at Zipatoni.

Users posted Zipatoni's name and address on the blog itself, and site visitors had a heyday slamming the agency and Sony for insulting gamers with a fake - and lame - blog that made it look like PSP's core user could be a grown man who speaks a ridiculous mix of hip-hop and high-tech slang and asks his parents for a gaming system.

Critics also blasted the site for pretending Sony wasn't behind the blog, and for blocking words like "marketing" and "advertisement."

Some comments even lambasted the tagline on Zipatoni's own Web site, "Active Consumers. Activating Consumers," with jabs like: "How many consumers has this Web site activated so far?" A "response" video on YouTube took Zipatoni to task for "Sony's failed attempt at viral marketing," splicing cuts from the blog and from Zipatoni's Web site and telling Sony, "We're not that stupid."

"Sony and Zipatoni Blasted Over Stealth Blog," PROMO Xtra, December 16, 2006

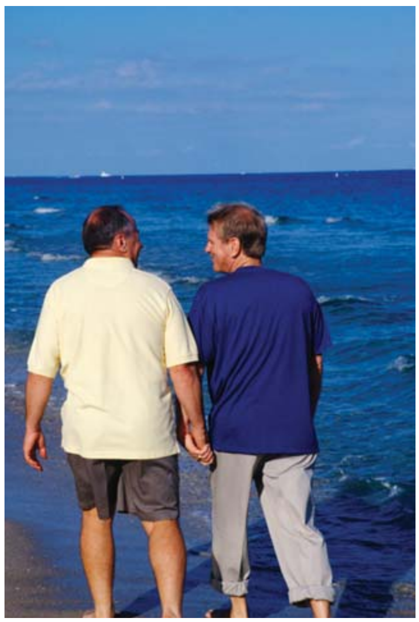
A city's gay-friendly rep draws gay tourist dollars

Nearly half of all gay men (48 percent) and lesbians (47 percent) surveyed in the U.S. say that a destination's gay-friendliness is important to them when making leisure travel choices. In fact, over one-quarter of gay men (27 percent) and lesbians (28 percent) say gay-friendliness is "extremely" or "very important" as a consideration in travel planning, according to a national survey conducted by the Travel Industry Association (TIA) in partnership with Harris Interactive, Rochester, N.Y., and Witeck-Combs Communications Inc., Washington, D.C. "While we've known the importance of the GLBT travel market for some time, this study really underscores the tremendous economic potential of the market to the travel industry," says Laura Mandala, vice president of research for the TIA. "This data will be invaluable as the industry increases its efforts to reach out to this historically underserved travel segment."

In addition, majorities of gay men (53 percent) and lesbians (69 percent) report that a place generally identified as safe and free from intimidation and threats - especially places "where they can hold their partner's hand in public" - is one of the top three ways they consider a destination as gay-friendly. "Gay-friendliness is frequently mentioned as a litmus test for how GLBT travelers and consumers favor destinations, travel brands and services. We find they are not looking for special treatment but instead expecting consideration and equal respect given all customers," says Bob Witeck, CEO of Witeck-Combs Communications.

Four out of 10 gay men (40 percent) and lesbians (40 percent) also recognize a gay-friendly environment if the city or community "is known to be culturally welcoming and to support diversity and GLBT civil rights." Positive word-of-mouth is a key consideration for both gays and lesbians, and gay men (33 percent) and lesbians (18 percent) also cite "gay nightlife, gay clubs and bars" as one of their top three considerations for gay friendliness.

The national online survey was conducted among 2,020 self-identified U.S. GLBT adult travelers (ages 21 and older) who have taken at least one leisure trip within the past 12 months and among 1,010 U.S. adults who self-identified as heterosexual and who also



have taken at least one leisure trip in the past year. Both the GLBT and heterosexual adults were randomly invited from among the overall Harris Interactive online panel of respondents to participate in the survey.

The GLBT respondents also were invited to state, from among given choices, which U.S. and Canadian destinations are gay-friendly. Top gay-friendly U.S. destinations named by the panelists (in order) include: San Francisco (76 percent), Key West, Fla. (57 percent), New York City (51 percent), Fire Island, N.Y. (48 percent), Provincetown, Mass. (46 percent), Los Angeles (38 percent), Miami/South Beach, Fla. (37 percent), Las Vegas (35 percent), New Orleans (34 percent), Palm Springs/Palm Desert, Calif. (33 percent), Boston (29 percent), Chicago (29 percent), Fort Lauderdale/Wilton Manors, Fla. (29 percent), San Diego (29 percent), Seattle/Bellevue, Wash. (27 percent), Washington, D.C. (23 percent), Honolulu (22 percent), Palm Beach/West Palm/Boca Raton, Fla. (20 percent), Portland, Ore. (18 percent), Philadelphia (17 percent), Rehoboth Beach, Del. (17 percent) and Providence, R.I. (6 percent).

The top-10 gay-friendly Canadian destinations named by the U.S. respondents in the survey include: Montreal (44 percent), Toronto (39 percent), Vancouver (38 percent), Quebec City (20 percent), Victoria, B.C. (16 percent), Niagara Falls, Ont. (15 percent), Ottawa (12 percent), Calgary (9 percent), Halifax (6 percent) and Prince Edward Island (6 percent).

The study also disclosed that gay men, whether traveling alone or in groups, tend to spend more on trips than lesbians and heterosexuals, as well as for airfare and car rentals. On their most recent trip, traveling alone, gay men on average reported that they spent nearly a third more on their total trip expenses ($800 on average) than did heterosexuals traveling alone ($540 on average). When gay men reported their last trip traveling as a group, the average spending of their entire party was $3,070, which was more than reported by heterosexual groups ($2,870) or lesbians traveling together ($2,740). For more information contact the TIA's Valerie Hutchinson at 202-218-3630 or at vhutchinson@tia.org.

Women entrepreneurs want to be their own boss

Women are opening businesses in record numbers and with increasing success: Nearly three-quarters (72 percent) of women-owned businesses are more than five years old, with almost

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names of note

Flemington, N.J.-based *HCD Research* has added **Peter Smith** as senior research manager.

NPD Group, Port Washington, N.Y., has named **Rupert Walters** president of entertainment and communications; promoted **Peter Greene** to vice president and general manager of NPD's consumer technology sector; and named **Peter Goldman** president of the home sector.

Jon Mandel has joined *VNU* as chief executive officer of New York-based *NielsenConnect*, a newly-formed business unit.

Julia Rushing has joined *Bellomy Research Inc.*, Winston-Salem, N.C.,

Rushing

Harper

as senior marketing sciences analyst. In addition, **Jim Harper** has been promoted to senior manager - mar-

Norman

keting sciences and **Matthew Norman** has joined the company as a CATI programmer.

NYTimes.com has hired **Murray Gaylord** as vice president of marketing. Marketing research will be among his new responsibilities.

Akron, Ohio, communications agency *Hitchcock Fleming & Associates Inc.* has promoted **Shirley Shriver** to vice president of research and marketing services.

Ellie Sykes has been named vice president, qualitative and online communities in the Vancouver

Sykes

Mavrow

office of *Angus Reid Strategies*. **Bryan Mavrow** has been named senior vice president, services. In Toronto, **Janet Lazaris** has been named senior vice president retail and **Dara St. Louis** has been named vice president.

James Briggs has joined Milwaukee-based *Market Probe* as director of research and consulting in the U.K.

Synovate has added **Franck Sarrazit** as the new senior vice president and director of Synovate Censydiam in North America. He will be based in Synovate's Miami office.

As part of a new organizational strategy, *VNU* will combine product innovation, research and development, and marketing into a single organization under the leadership of **Susan D. Whiting**, who will serve as executive vice president of VNU. **John Lewis**, currently president and CEO of ACNielsen U.S., will take on an expanded role as head of ACNielsen North America. **Pat Dodd** has been named president of ACNielsen Europe, succeeding **Frank Martell**, ACNielsen's chief operating officer, who previously ran the European business in addition to his global responsibilities and who has elected to leave the company. VNU is phasing out its group organizational structure, including marketing information, which was led by **Steve Schmidt**, president and CEO of the group, who announced his intention to leave the company.

Customer loyalty software firm *Satmetrix Systems*, Foster City, Calif., has named Harvard Professor and Co-Chair of the University's Program for Leadership Development **Das Narayandas** to its board of directors.

Meredith Gilfeather has joined *Digital Research Inc.* (DRI),

Gilfeather

Fetters

Kennebunk, Maine, as an associate director. **Allison Fetters** has joined DRI as a research assistant.

George Wishart has been named global managing director of New York-based *Nielsen In-Store*.

Jeff Histand has been promoted to vice president of the global healthcare research services division of Montgomeryville, Pa., research firm *J. Reckner Associates Inc.*

Gongos Research, Auburn Hills,

continued on page 76

product and service update

Maritz, Invoke offer mobile research platform

St. Louis research firm Maritz and research technology firm Invoke Solutions, Waltham, Mass., have partnered to launch Invoke Ping, a new mobile research platform. Born out of Invoke's live research environment, Invoke Ping will allow companies to connect with their customers at the point of experience - e.g., while they are in their stores - and collect customer intelligence on a continual basis, which will aid in the capture, analysis and dissemination of information based on real-time customer feedback. Invoke Ping allows data collected via cellphones to be reported and analyzed in real time. Portal-based access and an interactive dashboard will provide clients with an integrated research environment and single-source customer intelligence data. Maritz will be the exclusive launch partner of Invoke Ping in the U.S. For more information visit www.invokesolutions.com.

EZSurvey 2007 from Raosoft

Seattle software firm Raosoft has released EZSurvey 2007 for the Internet. This newest version enhances form creation, has more publishing automation, more export support for ODBC databases and new online reporting to give more flexibility for reports. The new release is designed to improve the speed and scalability of data collection for both EZSurvey database and ODBC database connectivity. The EZSurvey Personal Server (EPS) allows for checking the design of forms and for data gathering on notebooks and other mobiles. The EPS allows owners to collect data off-site, without dependence on an internal corporate server, and deployment enhancements are available for mobile and Short Messaging Service modules. Support for e-mail deployment has been improved. For more information visit www.raosoft.com.

New service measures in-store media

New York-based VNU and the In-Store Marketing Institute, Chicago, have partnered to launch a global measurement service designed to help marketing professionals better understand how to reach and influence consumers while they are in the store and making their final purchasing decisions. The new service will build on a development effort called P.R.I.S.M. (Pioneering Research for an In-Store Metric) conducted in early 2006 by a consortium of retailers and manufacturers led by the In-Store Marketing Institute. The P.R.I.S.M. Project created a new approach to in-store research that gives the retail industry a common language to measure in-store consumer reach. Members of the consortium include 3M, Coca-Cola, Kellogg's, Miller Brewing, Procter & Gamble and The Walt Disney Company, with support from retailers, including Albertsons, Kroger, Walgreens and Wal-Mart.

The new service, which will be developed through a new unit of VNU known as Nielsen In-Store, will measure consumer exposure to an array of in-store marketing vehicles, including television and radio, shelf talkers, digital signage and other point-of-purchase displays. Collectively, these in-store marketing approaches stand as the sixth-largest advertising vehicle in the U.S., at $18.6 billion in spending in 2005. The lead-market phase of the new service will be launched in the U.S. early in 2007 and is designed to fine tune the new metric before it is made widely available to the industry later in the year. The service will be extended globally in the future. For more information visit www.instoremarketer.org or www.vnu.com.

Site lists top diversity-owned firms

DiversityBusiness.com, Southport, Conn., a multicultural business Web site, announced the Div500, the seventh annual listing of the nation's top 500 diversity-owned businesses. The companies listed on the Div500 range in revenue size from $20 million to over $2 billion. At the top of 2006's Div500 are Software House International Inc., Somerset, N.J.; World Wide Technology Inc., St. Louis; Ensemble Workforce Solutions, Los Angeles; and Omega World Travel, Fairfax, Va. These four businesses are Asian-American-, Hispanic-, Asian-American- and woman-owned, respectively. For more information visit www.diversitybusiness.com.

Greenfield Online debuts mobile survey panel; online sampling service

Greenfield Online Inc., Wilton, Conn., has launched Text2Express, a mobile survey respondent panel whose members participate in surveys via their mobile phones. For more information visit www.text2express.com.

Separately, Greenfield Online Inc. unveiled its Real-Time Sampling capability, which solicits potential survey takers who are on the Web sites of the company's global survey network. Potential respondents are presented with an offer to participate in a survey. Through this network, the company has been able to reach potential survey takers online who are willing to take a survey but who may not want to join a marketing research panel. Once the individual clicks through, they are assigned to participate in a particular survey by Greenfield Online's proprietary Survey Router. This internally-developed technology screens survey recruits in real-time and assigns them into surveys for which they qualify based on demographic data. For more information visit www.greenfieldonline.com.

ESRI updates Web mapping app

ESRI, Redlands, Calif., is now offering

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research industry news

News notes

Netherlands-based **VNU Group B.V.** announced a new organizational and leadership structure that is intended to transform VNU into a more efficient enterprise. Under the new strategy, VNU is combining product innovation, research and development, and marketing into a single organization. VNU also will begin a transition to a unified, global client service organization that will allow it to present "one face" to its clients worldwide, simplifying client interactions. Initial steps to unify client service will be guided by the presidents of ACNielsen's five geographic regions. With these changes, VNU is phasing out its group organizational structure. VNU will centralize operational and IT functions in a new global business services organization. (At presstime in January, the company was conducting an external search for an executive to lead this organization.)

In addition to announcing a new operating model for the company, VNU said it plans to achieve a permanent reduction in its cost base of 10 percent over the course of 2007. The majority of cost savings will be achieved through business process simplification, organizational de-layering, and real estate and IT consolidation. The company expects a reduction in force of as many as 4,000 positions over the course of 2007, with most of the job cuts coming from non-client-facing activities.

Omaha, Neb.-based **infoUSA** will reorganize the recently acquired **Opinion Research Corporation** into two groups. The government research group will be called Macro International and be headed by Greg Mahnke, who has been with Macro International since 1999 when it was acquired by Opinion Research. The corporate marketing research group - Opinion Research USA, UK and Asia Pacific - will be headed by Gerard Miodus.

Acquisitions/transactions

New York marketing agency **Dean NYC** has acquired **Marketing Insights Inc.**, a marketing research and brand advisory company headed by Karen Dubinsky. Dubinsky will hold the title of chief branding officer.

Alliances/strategic partnerships

Under a new strategic partnership,

continued on page 74

Calendar of Events February-April

IIR will hold a conference on linkage strategies on February 26-28 at the Seminole Hard Rock Hotel and Casino, Hollywood, Fla. *Quirk's* readers can receive a 15 percent discount by mentioning the code XM1908QRK when registering. For more information visit www.iirusa.com.

Information Resources Inc. will hold its 2007 Summit for the consumer packaged goods industry on February 26-28 at the Wynn Las Vegas Hotel. For more information visit www.cpgsummit.com.

IIR will hold a conference on return on marketing investment on February 26-28 at the Trump International Sonesta Beach Resort, Miami. *Quirk's* readers can receive a 15 percent discount by mentioning the code M1921QRK when registering. For more information visit www.iirusa.com/romi.

ESOMAR will hold a conference on the Asia-Pacific market on March 12-14 in Kuala Lumpur, Malaysia. For more information visit www.esomar.org.

CfMC will hold a user conference at the Stanford Court Hotel in San Francisco on March 15-16. It will be preceded by advanced training sessions on March 13-14. For more information visit www.cfmc.com.

IIR will hold a conference on marketing on March 19-21 at the Venetian in Las Vegas. For more information visit www.iirusa.com.

The American Marketing Association will hold a conference on applied research methods on March 19-22 at the Renaissance Chicago Hotel. For more information visit www.marketingpower.com.

IIR will hold a conference on new product development for services on March 21-23 at the Rancho Bernardo Inn, San Diego. For more information visit www.iirusa.com.

Britain's Market Research Society will hold its annual conference on March 21-23 at the Hilton Brighton Metropole, Brighton, England. For more information visit www.mrs.org.uk.

IIR will hold a conference on youth marketing on March 25-28 at the Huntington Beach Resort and Spa, Huntington Beach, Calif. For more information visit www.iirusa.com.

IIR will hold a conference on achieving customer service excellence on March 26-28 at the Disney Grand Californian Hotel, Anaheim, Calif. For more information visit www.iirusa.com.

The Northern California Pacific Northwest, Southern California and Southwest chapters of the Marketing Research Association will hold their annual Las Vegas conference on March 28-30. For more information visit www.mra-net.org.

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on April 16-18 at the New York Marriott Marquis. For more information visit www.thearf.org.

IIR will hold its FUSE brand identity and package design conference on April 16-18 at Pier 60, New York. For more information visit www.iirusa.com.

To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail us at editorial@quirks.com.

By Barbara Champion

How to recruit leading-edge mature consumers

By now, it's certainly no secret that the population of mature consumers is increasing exponentially - and that the economic impact of this growth on all facets of society is, and will increasingly continue to be, tremendous. We are deluged everyday with startling statistics about this ever-expanding market. Newspaper headlines, magazine articles and best-selling books shout impressive facts about our country's graying population: adults ages 41 to 59 total nearly 77 million; by the year 2030, those 66 to 84 will comprise 20 percent of the population.

Not only are the sheer numbers of people within this segment huge, but its spending power - estimated at $2 trillion by the MetLife Mature Market Institute - is immense. Combined, these two factors present marketers within certain product and service categories the potential for almost unparalleled opportunity. As Sandra Timmermann, director of the MetLife Institute forecasts, these consumers literally have "the potential to change how America does business, since the goods and services sought by these older people will be in much higher demand." Even Gail Sheehy in her juicy bestseller *Sex and the Seasoned Woman* recognizes this phenomenon as nothing short of a "demographic tsunami." But disaster is most certainly not on the horizon for forward-thinking marketers who understand this potentially lucrative market and effectively target products and services to meet its evolving needs.

As a solid foundation for identifying opportunities within the mature market, marketers must understand that older consumers differ significantly from younger cohort and affinity groups. While consulting firms are still gathering data on the market and no unanimity of opinion exists, it is generally agreed that as one rounds the second half of life - somewhere around the 50-year mark - a rather profound psychological and emotional adjustment occurs; a reordering of priorities often takes place, whereby spiritually-motivated goals and interpersonal relationships provide the basis for many of life's most fulfilling satisfactions.

Editor's note: Barbara Champion is principal of Chicago research firm B. Champion Associates Ltd. She can be reached at 312-951-9630 or at champbarb@aol.com.

Too, it is often agreed by many who have studied this market that mature consumers welcome change and the potential for personal growth and reinvention - but exactly how this metamorphosis evolves and how it affects consumer behavior varies. When it comes to work, retirement, second careers, recreation, philanthropy, family, finances and how money is spent, attitudes and behaviors can vary widely. And for those who research the 50+ segment, it is essential to understand that the decision-making drivers of older consumers do not generally mirror those of younger targets. Some critical differences between mature consumers and younger counterparts include the following:

- Status labels and high-end brand

loyalties become less important as time marches on. Rather, value and quality supersede these factors in the decision-making hierarchy.

• Peer pressure and the desire to impress others also plays less of a role. It becomes more about how products and services enhance and deepen the meaning of one's existence that really count.

• Ongoing acquisitiveness as a means to fuel one's ego and sense of self-worth tends to fade with age. Again, the focus is more on life-enriching experiences and spiritual growth as one gets older.

Too, in identifying opportunities within the mature market, it is important to recognize that older consumers are oftentimes far less homogeneous as a group than younger segments. And this is why companies and brand managers are having a difficult time figuring out a way to reach the mature market as a whole. Within each age decade, for example, there can be wide variance in terms of health, physical and mental acuity, psychological attitude/outlook, and the degree of engagement in the basic fabric of life. We've all witnessed this; at age 65 or 70, for example, one person can exhibit "old" tendencies while another of the same age is physically vibrant and attitudinally youthful. Thus, in order to make research more productive, study samples should consist of leading-edge mature consumers - the upper strata that continue to be actively involved in the consumer marketplace. This begins with the recruitment process and crafting a screener that identifies this target based on lifestyle and psychographic measures, not mere demographics. To this end, here are some suggestions for screening respondents that may really help deliver high-impact research results:

• Screen by self-perceived age. Ask a potential respondent how old they feel relative to their chronological age and shoot for those who feel younger, more energetic and more vital than what their birth date might otherwise imply.

• Get at physical vigor and activity levels. Reach the on-the-go segment who participate in organized sports, walking groups, aerobic classes, fishing expeditions, etc. These are the folks most likely to be interested in varied and new experiences and open to novel ways of using tried-and-true products and brands.

• Go for those with a positive mental outlook. Ask a range of attitudinal questions relating to how one feels about the state of the world, the younger generation, personal challenges, and if they perceive the potential for possibility and change. Does this person exude a sense of forward-thinking optimism?

• Reach those who have influence on others. Look for people who have direct influence on the behaviors of their cohort group. Do friends call them for advice and referral? Are they called upon to recommend new restaurants or critique movies, books or travel destinations? Do they tell others what computer to buy, which real estate agent to use or what financial advisor can be trusted? The possibilities are endless.

• Screen for degree of involvement/engagement. Develop a checklist of various activities that demonstrate a respondent's involvement and engagement in community and social causes. These people are likely to have a large contact network of friends and colleagues whom they influence. The more activities and points of social engagement and commitment, the better! The list might include philanthropic organizations, political campaign work, neighborhood committees, alumni associations, religious study groups, fundraising and other volunteer committees, environmental activism, and continuing-education classes, to name a scant few.

Carefully consider

It is imperative to think about the mature market differently than younger consumers. And any research endeavor should carefully consider how to best recruit for leading-edge influentials, the slice of the mature market that is likely to be most profitable for many of today's marketers. This begins with a well-thought out, well-constructed screener that speaks to the lifestyle and psychographic dimensions that distinguish a dynamic mature market slice from more inert segments. | Q

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MARKET RESEARCH

4042 QK 02/07

By Gordon H. Bell and Roger Longbotham

(Sub-)optimal test designs for multivariable marketing testing

Multivariable testing in marketing is like the gold rush of the 1800s. New "discoveries" hit the press and we rush off to mine the next breakthrough technique. But the reality is not quite so glamorous - or chaotic. This "new" field of multivariable testing is actually the result of decades of academic research and statistical practice, with impressive depth beyond the basic terms and concepts that reach the marketing press.

In testing - as in marketing - clarity and efficiency should take precedence over technical showmanship. Statistical complexity on its own has little inherent value unless it achieves an obvious increase in ROI. The key is to find the right balance between powerful statistics, a user-friendly approach and clear, actionable results.

Efficient and flexible

Some multivariable test designs are both powerful and easy to understand. Full-factorial, fractional-factorial and Placket-Burman designs provide a solid foundation for efficient and flexible multivariable testing in marketing. You can use versions of these to test two or two dozen variables, analyze main effects alone or in combination with interactions and adjust the size and layout of the test design to meet your marketing objectives and constraints.

Other statistical designs sacrifice ease of use in order to achieve a specialized objective. Computer-generated "optimal" test designs are one example. First developed in the late 1950s for manufacturing experiments, optimal designs offer a way to run experiments under non-standard conditions. For example, in a manufacturing test of machine speed and flow rate, the combination of high speed and low flow may burn out the machine, so this combination must be avoided. Optimal designs allow you to test under sub-optimal conditions where certain combinations are constrained, the cost of testing is immense or the "response surface" has abnormal characteristics. Fortunately, these constraints are seldom necessary in marketing tests.

The D-optimality criterion is one method for defining optimal designs.

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For this approach, a design is set up to minimize the volume of the confidence region of the effect estimates (considering the variances and covariances of these estimates). Other optimality criteria will result in different test designs. In addition to D-optimality, statisticians have defined A-, C-, E-, G-, I- and S- (and other) optimality criteria. Even the same optimality criterion may result in different test designs depending on the optimization software. Simply put, if none of this paragraph makes sense to you, then these optimal test designs become a "black box." If you cannot use your marketing experience to interpret the results, then the statistical output should be implemented with great care.

In addition, optimal designs create a number of challenges:

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• These designs are applicable when your test variables are continuous (like temperature and pressure). However, when you have discrete variables, as we normally do in marketing tests, they either don't work or provide little or no benefit.

• The computer creates a design based solely on the input criteria and the underlying assumptions implicit in the approach. Optimal designs generally assume some form for the model, relationship or range of influence for the variables being studied. If these assumptions are not met, the design is no longer optimal. Rarely do we know this much about the relationships prior to conducting the test - that's why we are doing it!

• The complex analyses require advanced statistical skills. Unless (or even if) you have a Ph.D. statistician on staff, the analysis can be challenging and the results can be very confusing.

• Results are not only difficult to interpret but may change based on the selected criteria and assumed effects. Forcing constraints is like removing boards from the framing of a house - a few changes may be OK, but you never quite know when you have weakened the structure too much.

• The small increase in statistical power comes with a large increase in complexity. These designs make great journal articles but are not very practical for most real-world applications.

In multivariable marketing testing, the most "optimal" test design is usually one with a straightforward execution, clear analysis and easily understood results. From both a marketing and statistical perspective, esoteric designs like D-optimal designs are often a sub-optimal choice.

The right techniques at the right time

Multivariable testing is most effective as a strategic marketing tool. Test designs offer an efficient framework for testing your new ideas. But just as the framing of a house is only the first step towards a beautiful home, what you place upon the statistical framework is what ultimately determines the attractiveness of your test results.

Strategic testing means using the right techniques at the right time. What is your biggest opportunity to increase marketing ROI? What are the primary questions you want to answer in each test? Once you answer those questions, then you can follow a logical, structured approach:

1. Plan a series of tests. One test cannot answer every question. Consider a cycle of testing, where you build upon results from each test and refocus your marketing programs as you gain new insights. You can test many creative elements to determine which are important, or refine price and offer variables to quantify key interactions, or test your contact strategy to pinpoint profitable touchpoints, but testing all of these together quickly becomes unmanageable.

2. Answer the big questions before fine-tuning your programs. Find out which marketing-mix elements are important before testing the details.

For example, you can find out if envelope color makes a difference (perhaps testing a white versus blue envelope) before testing five different shades of color. Or you can quantify the impact of a 20 percent price increase, before testing 5 percent, 8 percent, 10 percent, 15 percent and 20 percent changes all at once.

This also means that two-level test elements are frequently more efficient than multilevel designs. Especially with creative elements, two levels can provide more useful and actionable information. For example, a test of two headlines, creative and offer-focused, can show a) if different headlines have a different impact and b) what type of headline is most effective. If the offer headline is more effective, then the next test can focus on different wording. In addition, multiple levels usually require larger sample size, more test cells and more complex analyses and create real difficulty in analyzing interactions.

3. Find the most powerful and efficient method for testing your ideas. The simplest solution is often the best. Real-world tests in dynamic markets with limited resources are much different than theoretical experiments in a controlled laboratory environment managed by Ph.D. statisticians. Putting powerful tools into the hands of marketers is more important than using the most theoretically advanced statistics. Testing bold new ideas, executing clean and fast marketing tests and rapidly improving performance is where the real power of multivariable techniques rests.

4. Understand the statistical rules you need to follow. The statistics encourage some self-restraint. Every test requires a balance between creative freedom and statistical structure. Part of the art of testing is finding a way to leverage your team's brainpower within the statistical constraints required to achieve reliable test results.

Gain useful insights

When the test elements, execution and results and clear and understandable, the marketing team is much more likely to gain useful insights and implement the results. If the test is a black box with confusing data, then the results may never be understood or implemented.

Although the underlying statistical theory is daunting, every marketer can understand the basic pros and cons of each scientific test design they execute. Your guide should be able to explain the alternatives and why the selected test design is the optimal choice for your unique marketing program and objectives.

Multivariable testing is a powerful tool to help you learn more, faster, with fewer resources. Yet like every tool, how you use it is the key to success. With a full toolbox of test designs you can find the most efficient technique for each situation. When the statistics become transparent to your marketing team, you free their creative energy for explosive growth. | Q

By Stefan Althoff

Does the survey sender's gender matter?

In the summer of 2004 the market research department of Hamburg, Germany-based aviation services firm Lufthansa Technik undertook an online customer survey. At that time, the market researchers had just eight months of experience in constructing online research projects. For whatever reason - poor questionnaire structure, the length of the survey, the season, the sample or the theme - the response rate was relatively low.

After one week in the field, a reminder was sent out - by a trainee named Julia. The response rate spiked to 30 percent. Could it be that, within a male-dominated business like the aviation industry, it is easier to convince potential respondents to take part in a survey if the sender of an invitation or a reminder mail is female?

For some later online surveys the researchers of Lufthansa Technik used female senders to dispatch the e-mail invitations and reminders. No methodical study was run but anecdotally there seemed to be evidence that e-mails from female senders were read earlier and the surveys were started faster. This assumed effect, dubbed the Anita effect, was named for the last female sender before the General Online Research GOR05 conference in Zurich in March 2005. (The conference is a joint effort of the division of Social and Business Psychology at the University of Zürich and the German Society for Online Research.)

A talk on the Anita effect was presented by the author at the GOR05 for the first time. In Zurich I spoke about the Anita effect with Professor Bernad Batinic from the Johannes Keppler University in Linz, Austria. Batinic is one of the pioneers of online research in Europe. He is one of the founders of the company Globalpark, a Germany-based online survey software. Together we agreed to analyze the Anita effect in a more detailed manner.

Three months later, Keppler University student Victoria Greif decided to write her diploma thesis on determinants of response rates of online surveys and Batinic became her tutor. The gender influence of

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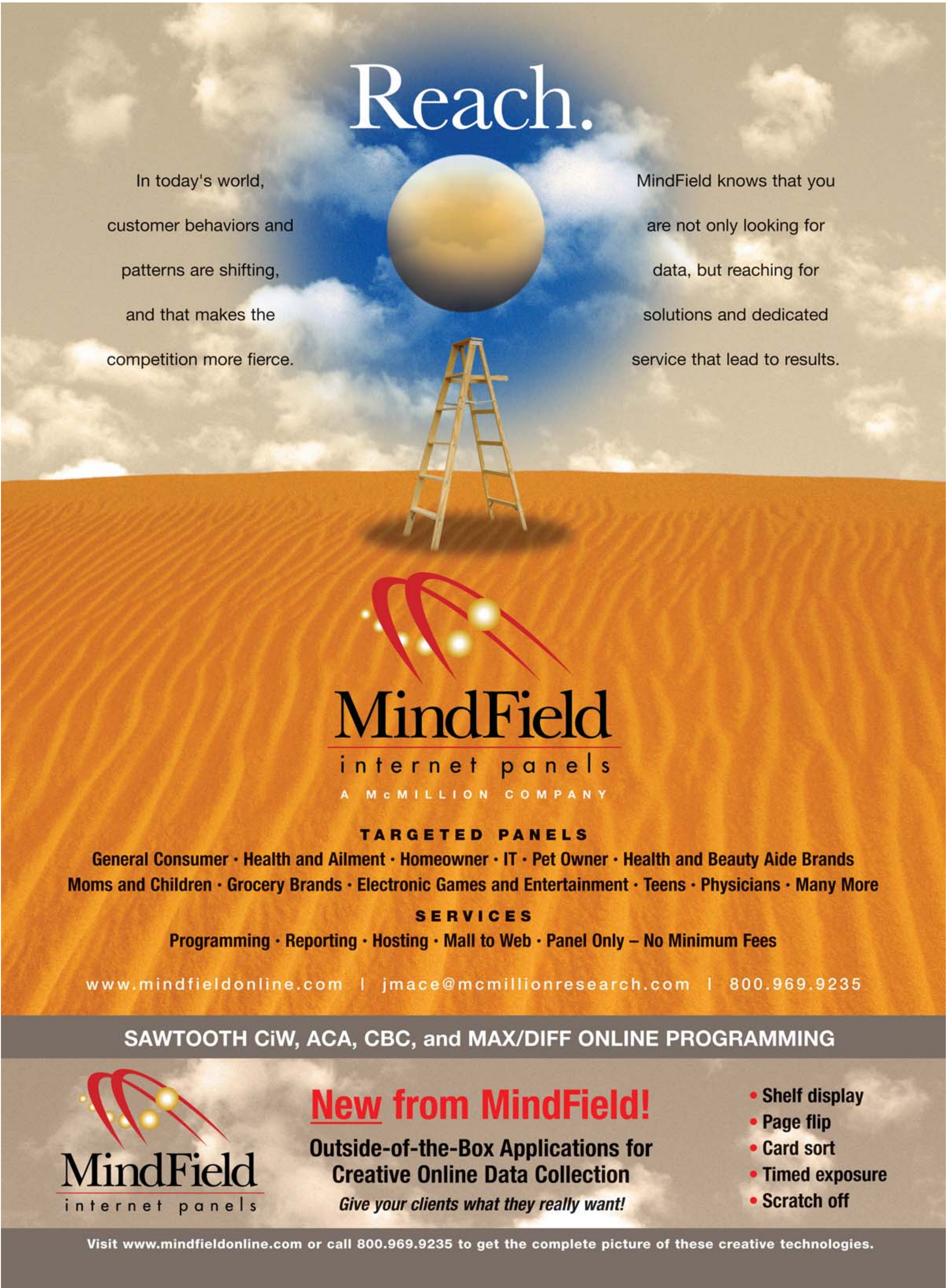
invitation and reminder mails respectively on response rates was one point she focused on.

Greif developed several versions of invitation mails for a online survey with Batinic's help. She varied among others the sender (male/female/neutral), the salutation (personal/impersonal) and the topic ("Web site test" or just "test").

At this stage Bodo Griel, a friend of the author's and project manager at German research firm Webfrager, heard about Greif's diploma thesis. Webfrager is a joint venture of the Cologne-based market research institute Psychonomics and Foerster & Thelen of Bochum, Germany, a field service. Griel suggested to run Greif's survey within the Webfrager panel.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Web site test

In autumn 2005, using a test design created by Greif and Batinic, the survey started. Webfrager panelists, 1,800 in total (18 groups of 100 test persons), were invited to a simple Web site test.

The results of the survey were not as clear as expected. The team had assumed that the combination "female sender," "personal approach" and "clear, defined survey subject" would have had the highest response rates. But that was not the case. In all groups the response rate was around 50 percent, which was good. Even taking into consideration that the panelists were relatively new (no long-time-registered panel members were included), it must be assumed that panelists would behave and react in a different way:

• It must be assumed that most panelists have a Web-based e-mail account (e.g., yahoo.com). These accounts work without preview windows, therefore only the sender and the topic could have any impact. There is no additional information displayed.

• In addition, private persons have less e-mail traffic than businesspeople. The invitation mail does not need to win over other mails.

• Panelists know the e-mail address of their panel company. They do not pay attention to the complete address, only to the last part (behind the @ sign).

Serious hints

Even if the results of the panel survey didn't support the existence of the Anita effect, the team didn't want to give up. In the meantime it got some serious hints from other colleagues that the assumed effect really exists.

The author and Griel wanted to start another survey to further investigate the Anita effect. In January 2006 both had the idea to run a test using an employee survey at Lufthansa Technik about intranet usage. We assumed that the topic was moderately interesting, therefore ideal for testing the impact of the Anita effect.

At Lufthansa Technik it is quite usual to use e-mails for internal communication. Most employees use Microsoft Outlook, which has a preview window. The test design was relatively simple:

• two groups of 105 men;

• a similar structure for both groups;

• one group got an invitation mail from a female sender, the other one from a male sender.

This relatively small survey had a response rate of nearly 80 percent. In the end the group with female sender had a higher response rate (83.9 percent versus 74.3 percent) but the result was not statistically significant.

At the beginning of March 2006 - just before the GOR06 - Greif started a survey with registered users of UNIpark, a Globalpark survey offering aimed at the academic market. In total 460 users - split in four groups - were asked to rate the UNIpark home page and the usability of Globalpark online survey software. Greif developed different invitation mails for each group in which she varied the gender of the sender as well.

In this survey a significant result was seen: The response rate was higher from the group that received an invitation mail from a female sender.

More research necessary

The response rates of online surveys depend on many different interrelated determinants. Obviously, more research is still necessary to find out if the Anita effect is real.

Some questions that deserve further study:

• What effect does the sender's possible country of origin have? That is, what if the sender appears to come from Eastern Europe or from China?

• What about the name itself - are there surnames which could be understood everywhere?

• Has Julia a better chance than Andrea? (Andrea is also a male first name in Italy.)

• What about the combination of first name and surname?

• What about a male sender within a female environment?

The team agrees on one point: The cooperation in this project between academia and business was really interesting and informative and could serve as a model for future efforts. | Q

By Tracey Carsten Roll

Internal research, external benefits

Experian uses employee surveys to drive organizational change

Editor's note: Tracey Carsten Roll, currently an independent organizational development consultant, was formerly employed by Experian as a manger of organization effectiveness. She can be reached at tracey@traceycarsten.com.

Trying to get your hands around organizational change is a challenge for most companies, but it is even more daunting when you are trying to identify the needs of employees that support multiple product lines and span across numerous geographic locations. Today, Web-based surveys continue to take on a strategic and instrumental role in the feedback lifecycle process, as they enable an organization to gain valuable feedback and hear the voice of both its employees and customers.

While traditional research methodologies have provided this voice, a new dimension in efficiency is achievable through Web survey technology. As a result, surveys have evolved into a method that truly takes into account the pulse of an organization. However - and as anyone in the field can attest - true change is not easily achieved as it takes more than technology to make the survey process successful.

At Experian, a Costa Mesa, Calif.-based information firm with sales exceeding $3 billion and with more than 4,500 employees in North America, one executive set out to truly hear the voice of his constituents in order to meet his primary goal of improving customer loyalty and positively impacting his organizational operations through better employee performance. When Chris Callero joined Experian's credit services division as president, he immediately began an ongoing effort to survey his employees to determine their attitude toward the company, to determine if they had the tools needed to be effective on the job and, more specifically, to determine if the company was communicating corporate goals and objectives from the top down. Callero wanted to demonstrate that the division was focused on reaching out and listening to employees, to communicate the corporate objective of ensuring the highest levels of customer satisfaction and convey how much the company needed employee participation in order to be successful.

Began with divisional managers

As a strong advocate of surveys and a believer in the value they bring to organizational change, Callero had realistic expectations about the scope of the initiative. Consequently, he began the educational process with divisional managers first. Callero knew that once they were comfortable with the survey process and had bought into the overall value, they could then help drive employee participation and action. Beginning with business and functional units, such as sales, finance and IT, the survey team trained managers on how to interpret survey data, how to identify actionable results, how to communicate and encourage employees to participate in surveys and how to implement actionable change as a result of survey findings. The training specifically underscored the importance management played in promoting and embracing the survey process and in encouraging those who report to them to participate.

With a history of limited or marginal success with outside vendors using paper-based surveys, Callero turned to an online survey application, choosing to work with Inquisite, an Austin, Texas provider of Web survey technology and services. Inquisite also embedded several analytical options within its survey application, including the ability to download the data into SPSS.

Because the survey technology was accessible online, the survey team disseminated daily e-mails that reported survey participation rates to management. This spawned competition among managers who then solicited employees to participate if they had not already done so.

Quarterly meetings

As a result of educational initiatives and the company's move from paper surveys to electronic versions, Callero's divisional survey achieved a 92 percent response rate among participating employees. In fact, armed with this intelligence, Callero instituted quarterly face-to-face meetings designed to communicate to employees exactly what issues were at hand and what specific actions would be implemented.

For example, human resource and organizational development personnel began to issue their own internal, independent "pulse" surveys (i.e., surveys which consisted of a few targeted questions fielded to a small, select audience) to determine specific challenges facing their respective business units. Because pulse surveys are designed to solicit immediate feedback, they could be developed within a few days and fielded within a couple of weeks, enabling Experian executives to institute change faster than traditional methods. Because the

feedback learned internally at Experian was so valuable, other groups such as marketing services and credit services began applying the same practices external to Experian and surveyed customers in order to examine and improve customer satisfaction.

Ongoing process

It was at this point that the company-wide survey initiative became an ongoing year-round process rather than a sporadic, one-time event without follow-through. As the entire division became immersed in the survey process and success, the Experian North America CEO decided to emulate the credit services division and develop a company-wide survey initiative that would involve employees at all levels within the North America offices. With the expectation that this phase would be as effective as the first, this larger survey actually produced a slightly lower response rate than the original, which only further demonstrated the importance of achieving managerial support and participation within each stage of the survey process. In fact, Callero's efforts to educate his managers on the strategic value of survey data paid off, as his direct reports had the highest survey completion rate of any other division throughout the company.

Next level

With the organization's long-term interest in mind, Callero has moved beyond lessons learned and has taken surveys to the next level by applying the analysis known as trending, which looks at how data has changed from one year to the next, often because of survey-related efforts. For example, he plans to identify how customer loyalty has improved as a result of survey feedback-related efforts. By performing trending analysis, the organization will be able to effectively measure both employee and customer satisfaction year over year to realize the impact of survey-related actions and to identify areas that need improvement.

Despite the lower response rates (78 percent - which is still high, as the normal rate is in the 60 percent range), this survey supplied management with valuable feedback that was used to demonstrate to employees that management was listening to their issues and was committed to making the appropriate changes based on their responses.

Change across all divisions

Overall, the company-wide survey was successful in that it instituted change across all of Experian's North American divisions. In fact, during the executive post-survey meeting, and to ensure corporate-wide change, business executives were required to present three changes in their business or functional unit they felt would most improve overall employee performance and ultimately customer satisfaction based on survey results. As other business units became aware of the benefits of online surveys, they quickly began to apply the same survey technology and methodology within their respective areas of responsibility.

Engaging employees

Experian knew that a successful business is built on successful relationships. As demonstrated by Callero and Experian, surveys can be a powerful management method for engaging employees in organizational change. Using the survey process as a vehicle for an ongoing dialogue with employees proved successful for the company as it enabled it to leverage accurate and continuous feedback to implement change - regardless of whether those changes involved customer satisfaction or employee performance.

Secure buy-in

Before embarking on your own survey initiative, be sure to secure managerial buy-in to understand and act upon this feedback and then to consistently communicate changes to your audiences. Doing so will help you in your quest to realize a significant increase in both employee and customer satisfaction. |Q

special markets: kids

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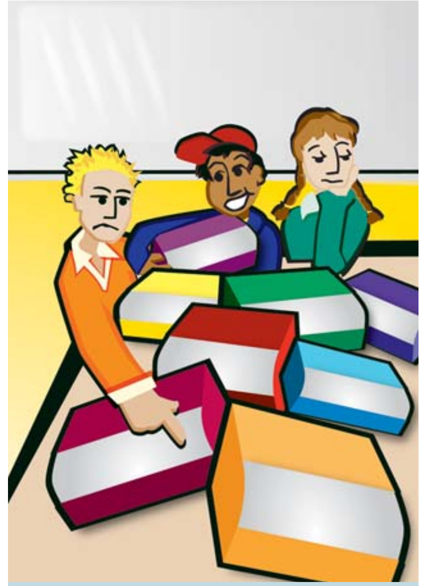

By Barbara Rugen

Many marketers who are new to kids marketing think of kids as mini adults and aren't aware of their various developmental stages. Clients and agencies that understand kids developmentally in terms of how they process information have far fewer issues with creative and fewer reworks. In the next few pages I'll suggest ways that qualitative research can address how kids from 4 to 14 process information, giving examples from case studies, and suggest methodologies that work well for different developmental stages.

Shaping qualitative research to kids' thought processes doesn't mean dumbing down in detail or depth. Essentially we can ask kids all the questions we need to be able to achieve our research objectives, but we need to do it in concrete terms within a stimulus-driven format. Kids tend to think specifically, concretely and literally. Ask kids how they decide what they want, or if they have ever asked someone to buy something in a given category for them, and the abstract, general nature of the questions can leave them perplexed. Even asking why they think or feel a certain way can be risky; it's an abstract question, and they may not know the reason or even if there is a rational explanation. But translate these questions into concrete terms within a stimulus-driven format, and you can get full and detailed responses.

In focus groups with kids, you often need to shape your methods to fit their needs

In a recent toy study, for example, the clients needed to understand the motivations of 5-11-year-olds for wanting a certain kind of toy. Specifically they wanted to know:

• Category motivations: Thinking of a toy in this category, why do they want that? How did they decide they wanted that?

• What brand/type do they like best? Why?

The task was to recast these adult-style questions to register with 5-11-year-olds. So for example:

To understand category toy motivations, we had the kids bring in their current category toys. The kids told us and showed us what they liked doing with the toys, likes/dislikes/suggestions about the toys and recalled the purchase dynamics around these toys from product awareness to purchase decision. By discussing the specific

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Building integrity one job at a time

9250 Baymeadows Road, Suite 350 | Jacksonville, Florida 32256 | 904.731.1811 F. 904.731.1225 | www.irwin-jx.com toys they owned and played with, they revealed sources of influence, nature of appeal, motivational triggers and purchase dynamics, as they could not have done with more general or hypothetical questions.

To understand meaningful attributes and brand equity, we then showed them a variety of brands and types of the product category (18 variations in all) and had them do a product sort as a group, based on their own agreed-upon criteria of importance; kids 10 and up also ranked the 18 variations from best to worst as a group, using their own criteria. This was followed by debrief and probing. By comparing and evaluating these specific stimuli, the kids revealed the most meaningful attributes and relative pull of brand. By using their own criteria, they positioned the products from their own perspective. Had we taken the more linear mode of questioning used with adults - e.g., what do you think of this packaging, what do you think of this color, etc. - we'd have gotten an abundance of data but probably missed the point. Leaving it up to them to sort the 18 varieties on their own terms, we could identify the cues that indicate fun and value to them, and which the client agency will now use in product positioning.

To understand the competitive value of the client's product, we gave the kids 15-20 minutes to play with the product in pairs. In this way we could determine where and how the product succeeded and failed to match with the meaningful motivations and attributes they had identified, as well as gain new insights. When we also compared play patterns across the different age groups, we could understand how we needed to position the product by age-appropriateness and identify product development opportunities reflecting the patterns of the different age groups.

Same focus

Concept testing is not recommended for kids younger than 7, and kids 7 and older need the same focus on specific stimulus in concept testing as in product testing. For example, it's helpful to give them a pre-assignment around the topic to get them thinking about its specific roles in their lives. In a project I worked on with WonderGroup, a Cincinnati-based kids marketing agency, the task was to help a retailer gain positioning as a fashion Mecca for tweens. WonderGroup asked the tweens it recruited to wear their favorite outfits to the focus groups. Each of them explained what they liked about their outfit - from tops to pants to shoes to accessories - and these explanations, followed by probing, gave rich insight into the influences and motivations for being glad or proud to wear something. That was invaluable for positioning as well as merchandising. Allowing them to select what was important to them based on their own criteria got us directly to the point and informed the rest of the discussion.

Taken at face value

Kids tend to take concepts literally - e.g., the proportion you depict graphically is the proportion they'll expect, and the hyperbolic adjective in copy is frequently taken at face value - but they can springboard from the literal stimuli to imagine any number of improvements and product variations. Working with Kellogg's, for example, the WonderGroup team gave the kids a competitor product and let them show us the ways they usually enjoy eating it. For 15 minutes, each kid played with the product, applied the toppings, took different size bites sometimes with and sometimes without sipping their beverage, and so on. The choices they lavished attention on, accompanied by answers to probes, revealed insight platforms that were valuable for positioning and product development, and also served as the basis for ideation.

As the above examples indicate, watching kids - what they wear, how they play, how they sort products, how they eat - is as informative as listening to what they say. Body language is also critical to understanding their responses. We need to watch their energy level to get the full measure of their response. Watching where the kids lavished attention on the product stimulus gave Kellogg's the direction it needed for competitive product development. Nestlé, which is also very shrewd in kids market research, focuses as much on how energetically kids respond to concepts as on their comments. The proposition that excites kids - or upsets them - can be more indicative of success or failure than discussion around likes and dislikes.

Along these lines, in a recent toy study for a client, the kids discussed their love of the product. Then we gave them the stimulus - a new version to try out - and watched what happened. One boy burst into tears because he couldn't figure it out, and two boys got into a fight over sharing the parts. Clearly the reaction to the stimulus was the better indicator of product acceptance than their verbal endorsement.

Concrete language

Because they typically think literally and concretely, kids can better respond to questions and probing if the language itself is very concrete (the same is true in quantitative research with kids). As mentioned earlier, asking for a rational motivation - e.g., why do you like that? - can be perplexing; but ask the question in descriptive terms - what do you like about that? - and the kids more easily grasp the question and answer accordingly. Ask a question without boundary - what could you do with this? - and they're confused because taking that question literally can lead to endless answers. But rephrase it in terms of everyday application - what would be good to do with this? - and they'll give their array of probable

Conceptual Language	Literal Language
Why? (e.g., why do you like that?)	What do you like about that? (descriptive)
Why is that better?	What makes that better? (descriptive)
What could you do with this?	What would be good to do with this? (probable applications)
Do these racing cars need something to indicate the winner or not?	If you're racing the rocket cars, how can you tell which car wins? (problem-solving an experience)
What do you think of this combination of ingredients?	Close your eyes and imagine that you have one of these. Chew it up. What does it feel like in your mouth? Taste like? (descriptive)

uses.

Here is a conceptual question that will engender a conceptual – hence potentially misleading – answer: "Do these racing cars need something to indicate the winner or not?" Answer: sure they do, and the indicator could be any number of things. Here's a problem-solving, experiential question that will get a lot of energy around determining the best solution: "If you're racing the rocket cars, how can you tell which car wins?"

Manage different stages

Marketing consultant Jeff Goldstein offers an example of needing to manage different stages of kids' development: His client wanted to determine the product interest of 2-12-year-olds! The following methodology is an example of a cost-efficient solution to the goal.

• Under 4. Kids under 4 are typically reliable only for observational research. So we focused on age 4 and up – recruiting 4-12-year-olds and moms of 4-12-year-olds who also had 2-3-year-olds. The moms answered a pre-questionnaire that focused exclusively on their 2-3-year-olds, and in the moms focus groups, they spoke for all their kids.

• 4-6-year-olds. This age group works well in dyads with moms. An hour-long dyad is recommended, because the kids tend to lose focus after an hour. Their comfort level with mom encourages them to open up, and mom can help interpret when the kids have trouble expressing themselves. By having the child speak in the first half of the dyad, it's possible to largely eliminate mom's biasing effect.

A variation of this is a one-hour minigroup of four participants – two mom-kid pairs – when the object is to understand how kids will play with the product. Let the kids talk with mom's assistance as necessary, then let the kids play together, then everybody talks about the experience; kids first, then moms.

When moms are present for observational research, it's helpful to give them observation cards to record their kids' behavior while the children are using the stimulus. The moms can provide such useful data as the answers to the following, used recently regarding a toy set:

— What things specifically appeal to him in playing with this set?

— What things specifically don't appeal to him?

— Most engaging aspects

— Ease of use for him: overall and specifically

— Sources of confusion, difficulty for him

— How play compares with his usual toy set play pattern

— His overall interest level in this set

— Other observations about his use of this set

• 7-11-year-olds. Kids as young as 7 are capable of focus groups. Kids 7-11 can be articulate and focused, provided they are segmented by gender and the groups are limited to a maximum of six kids; otherwise the distraction is too great. Likewise, the focus groups should not exceed 90 minutes – once you get past that amount of time, kids grow restless. Since kids tend to respect age hierarchies, it is important to separate the younger and older kids so that the little kids don't feel inhibited by the older ones and the older ones don't feel they're being treated like little kids. Good groupings are 7-8-year-olds, 8-10-year-olds, 10-11-year-olds, and/or 11-12-year-olds. Poor groupings are 7-9-year-olds because of age differences and 10-12-year-olds because of the perceived social differences between a "mere child" and a pre-teen.

• 12-14-year-olds can be the bane of marketers because they love to pretend disinterest. But the truth is that they are very competitive and, if divided into teams, will work to outdo their opponents in articulateness, creativity, detail, etc., especially if a token prize is involved. It's a win-win when young teens get to validate their capabilities through competition, and the research team gets a wealth of data in the process. Follow up the competitive sections with concrete, descriptive probing – even young teens are not yet ready for probes asking them to rationalize what they have revealed.

Big difference

Kids make purchase decisions about kid products and services, and it's been estimated that kids also influence purchase decisions about family products and services in hundreds of categories. We know that understanding the consumer is the key to marketing strategy. Tapping into kids' thought processes to understand their motivations and insights can make a big difference in creating effective marketing strategy for this important market. |Q special markets: moms

Let me show you what I need

By Kari McGlynn

In the ongoing quest to deliver desirable new products quickly, manufacturers are increasingly focusing on ways to rapidly examine opportunities within the early stages of the design process.

The "fuzzy front end," a term coined by product development expert Don Reinertsen, refers to the conceptual or planning stages of product design, where emerging market opportunities and user needs are first discovered and established.

Ethnography has emerged as an important tool utilized throughout the product development cycle. Observing a consumer's actual behavior within a particular role or context provides designers with a grounded set of conditions upon which to base their ideas. Watching end users interact with a product in its real-life context can offer invaluable insights for how to further refine that product's design.

Logistical challenges

Traditional ethnographic research methods, however, pose their own logistical challenges. Depending on the scope of a product's reach within the marketplace, observing an adequate cross section of end users can require significant travel. One of the biggest complaints from research clients regarding ethnography is that the process is too costly and time-consuming.

Still, as product lifecycles shorten and the need to consistently reevaluate and revise product design increases, user-centered research utilizing ethnography is becoming more and more important. To embrace the rapid pace of a user-driven product development lifecycle, manufacturers need rapid, user-centered feedback channels for informing the entire process.

Moms use remote digital ethnography to capture their child-transport troubles

Beginning in early 2005, a new class of technological solutions began to become widely available. One such solution comes in the form of a mobile device, similar to a Pocket PC, which features an onboard camera and audio recorder (Figure 1). A software application loaded on the device provides interactive instructions as to what lifestyle events are to be captured, allows users to take pictures using the camera and attach audio recordings to these images. Furthermore, the mobile device features wireless Internet connectivity, thereby allowing respondents to

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www.ithinkinc.com 2811 McKinney Ave., Suite 350 Dallas, TX 75204 [214] 855-3777 instantly upload their photos and voice notes to the Web upon completion of an assignment. In essence, this combination of hardware, software and networking technology allows ethnographers to shift the observation from an in-person task (i.e., expensive and time-consuming) to a remote, digital exercise (e.g., far less expensive and quick.)

Unique user needs among mothers

The primary objective of one of our first projects using the remote digital

Figure 1

ethnographic method was to examine unique user needs among mothers with regard to transporting their young children by car.

The study involved expectant mothers and mothers with young children (ages 0-6) who currently leased or owned a variety of different vehicle types. The study called for reaching women throughout the country, and utilizing a traditional ethnographic approach would be impractical, given cost and time constraints.

To kick the study off, we fielded an online screener survey to nearly 200 female panelists provided by BabyCenter.com's 21st Century Mom Panel. The screener included a variety of measures ensuring that the respondents fit the research requirements and would be active, articulate participants.

From those who completed the screener survey, a total of 20 women were selected. These women represented a diverse mix of geographic locations, parental experiences and vehicle ownership. All 20 respondents were contacted by phone prior to being shipped their mobile device in order to ensure their full comprehension of the methodology being utilized and to verify their willingness to participate.

Detailed instructions

Within a few days of the follow-up phone calls, mobile devices were being delivered to each respondent, along with detailed instructions on how to use the onboard software application to take photos and record voice notes. These instructions included the discussion guide topics for the research, which consisted of a series of 15-18 photo assignments with corresponding follow-up questions.

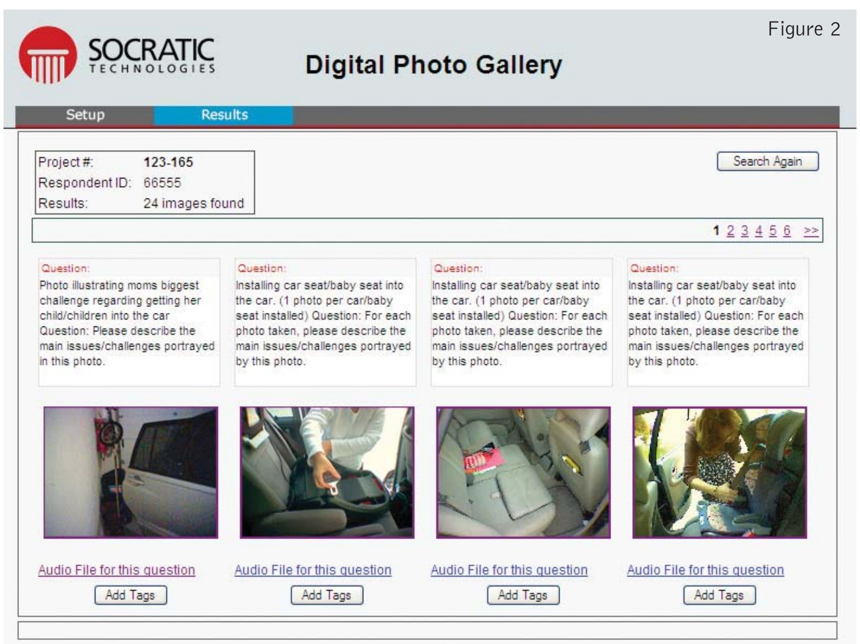
The participating women were given a period of one week to complete their assignment. During the course of that week, a project director was available by phone in case any of the respondents had problems with their devices or needed to ask a question about the study. In general, most respondents found the device to be intuitive and completed the assignment within the first few days, while a handful of respondents did not complete the entire assignment. A total of 16 of the 20 respondents successfully submitted their photos and voice notes.

Upon completion of the assignment, respondents launched an additional application on their mobile device that directly uploaded the data they collected to our technology partner's Internet server. From there, we were able to download each respondent's collection of images and accompanying audio to our own server, where these files became available for viewing and listening within a proprietary gallery application (Figure 2). Within this application, clients and project directors had access to all of the data for both individual respondents and individual discussion guide topics. We particularly like aspects of the system that allowed images to be tagged with query terms as well to facilitate the search process for pictures that share a theme. Combined with the data from other projects, the resulting database can be searched further for salient findings and cross-referenced among other studies and topics.

Rich imagery

By placing our respondents in the role of storyteller, we were able to

Figure 2



collect rich imagery and detailed audio recordings. The mothers participating in the study thoroughly documented all of the different steps and elements involved in transporting their children by car. Through their accounts, a variety of specific challenges came to light:

• Current and expectant mothers have unique needs requiring that they be able to manipulate the space within their vehicles efficiently. They are more likely to value versatile space management features, such as tilt steering, adjustable cup holders, specialized storage compartments and individual folding rear seats.

• Installing a child's car seat is such a challenging process in many vehicles that some mothers of young children require help in order to do it properly, and many will leave the child seat in the car permanently for fear of having to repeat it.

Set of opportunities

Thus, the results of the research uncovered a unique set of opportunities for new features and vehicle designs that address the needs of women with young children. For example, most mothers rely on their car's rearview mirror to keep an eye on their children while driving. This provided observationally-based evidence that a market opportunity might exist to provide moms with specialized devices allowing them to better monitor their children in the car, thereby reducing the need to turn their attention away from the road.

Having collected a rich cache of compelling multimedia feedback, we decided to let the data speak for itself by embedding images and audio clips directly into the research report (Figure 3). Publishing the report as an Adobe PDF document, we were able to include pictures that acted as hyperlinks – playing an audio file containing a corresponding quote when clicked. The result was a rich, interactive experience for the reader that provided an additional layer of direct interpretation by giving them access to the source material of the study.

Figure 3

Brings researchers closer

Through leveraging new technology to allow the instant transmission of self-collected data from respondents, this new approach brings researchers closer to realizing the benefits of traditional ethnographic fieldwork with less time and fewer cost considerations.

In total, this methodology required less than four weeks to go from kick-off to report delivery. For future projects, mobile devices might be pre-positioned in the field ahead of time, allowing for the rapid collection of lifestyle data with even shorter project turnaround times. This might also be beneficial for long-term longitudinal studies. In either case, the result will be dramatically lowered costs.

During the early stages of product design – such as market evaluation, prototyping and product testing – remote digital ethnography may hold the key to quickly and affordably assessing user needs across cultural and geographical boundaries. Although the technology is still in the nascent phase, our experience has been positive and we look forward to ongoing development enabling the efficient use of this interesting technique. | Q special markets: kids

From second grade forward

By Pam Goldfarb

How young is too young for focus groups? Children are wonderful, uncensored consumers. It's just important to understand their limits at each age so that you - the moderator - can encourage a fantastic experience for both your client and kid respondent.

The general consensus among many moderators working with kids is that second grade (age 7 or 8) is the perfect age. Please note that it is common practice to refer to children by school grade when talking about appropriate ages for focus groups. This is a great way to speak of a collective development stage for children, who are socialized in that context until they reach college age.

An estimated 25 percent of children in the U.S. or 20 million kids are growing up in single-parent households (U.S. Census Bureau). An estimated 80 percent of today's U.S. families have both parents working - whether in the same household or not. In addition, these same children are watching much more than television to get their marketing messages, with as many as 1,725 brand impressions made on a typical child every day in mediums that vary from traditional television and radio to the Internet and even watching billboards on the road home or in the grocery store with mom (Kids Food and Beverage in the U.S., a marketresearch.com report).

Tips for starting kids in the focus group process

There are several factors that make second grade a good age for kids to begin participating in focus groups independently (without mom or dad). By that stage, they are more comfortable with their peers and other people outside their immediate family. Thanks to a year or more of full-time school days under their belt they can pay attention to questions and comfortably share their ideas. Responding to a question is perhaps the basic job of a good focus group respondent, right?

Beware, though: Boys and girls do differ at this age. A general rule of thumb is to divide by gender and keep groups small for this age group. Boys are often more independent than girls, being allowed to travel down the street for quick errands with neighbors or riding their bikes. Girls don't gain their independence

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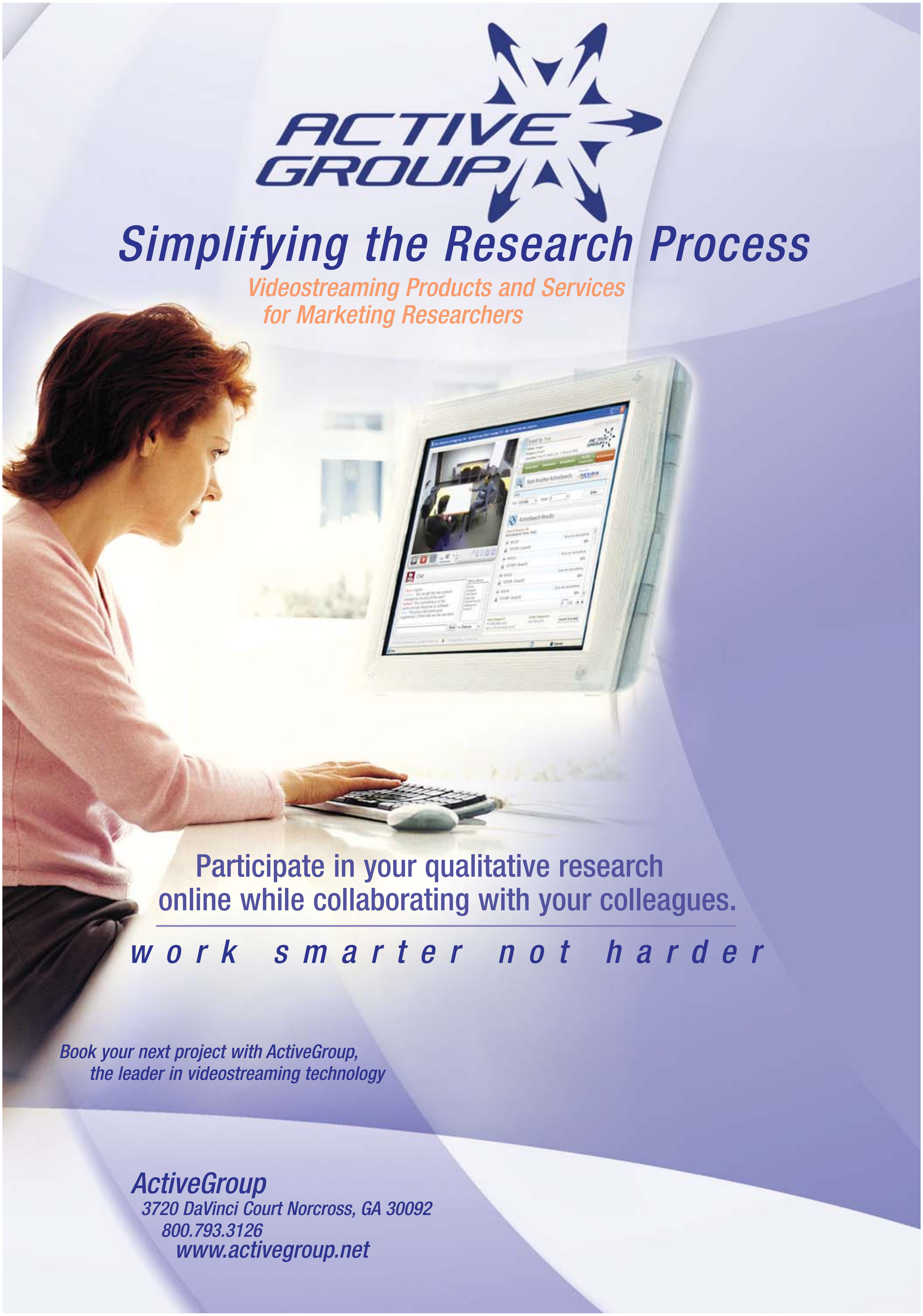
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from their parents until a year or so later, but don't worry: They do have opinions. Keeping them in gender-specific smaller groups ensures that comfort levels will be quick and great insights will flow throughout.

Ages	Insight Opportunities	Grouping	Obstacles
Preschoolers: 4 to 5 years	• Can make decisions based on their interests – toys, cereal, snacks, etc. • Asking mom or dad for specific products, knowing big brands	Gender groups with parents	• Require adult guidance to feel comfortable with stranger (e.g., moderator) • Easily influenced by their peers and adults • Short attention span • Aren't able to explain feelings beyond basic ideas
Kindergarten to first grade: 5 to 7 years	• Can make decisions based on their interests – toys, cereal, snacks, etc. • Can return to some younger behaviors – seeing themselves as the center of the universe • Very literal in behavior • Use inanimate objects to play and explain their life	Gender groups with parents	• Likes to copy their peers • Does not think logically • Is very literal • Is bound cognitively by sight and senses
Second grade to fourth grade: 7 to 10 years	• Making their first "solo purchase" at a neighborhood convenience store or nearby grocery – a time of new independence • Understands immediate pasts when tied to the present or a subject matter • Enjoys the process more than the end result • Responds to representative symbols	Gender mini or buddy groups	• Needs to work in smaller gender groups • Complains more than other years • Negotiates and challenges authority • Can dominate conversations if allowed
Fourth grade to sixth grade: 10 to 12 years	• Like rules and logic • Can classify and organize abstract ideas • Able to concentrate for an extended period • Loves to try new things • Replies honestly to what they feel is right and wrong; good at solving social issues	Gender groups	• Needs to be noticed for their idea • Quick tempers and sensitive – extremes of emotions • Loves to argue • Boys are more independent, girls are less comfortable at this age
Junior high/middle school – sixth to ninth grade: 11 to 15 years	• Become mini-adults with strong, uninhibited opinions • Consider abstract reasoning in intellectual pursuits • Up-to-date on current events, politics, social justices; pop culture and materialism • Want to solve problems • Spending much time shopping and keeping up with trends	Gender groups	• Can easily lose interest, must be encouraged from beginning to contribute • Have a great deal of slang vocabulary • High energy • Moody • Boys are awkward, girls are more agile
High school – ninth to 12th grade: 14 to 18 years	• Want to be listened to as authority • Up on all pop culture trends, current events, politics, social justices and materialism • Thinks creatively to solve problems • Understands budgeting • Wants control of their lives	Gender mini or buddy groups	• Can be easily distracted • Not always good with authority • Easily bored

Magical age

Fourth grade - the "senior" year of elementary school - is a transition time that moves kids from children to prepubescence. It's a magical age that can be more difficult for some and easier for others. Girls differ greatly in this age group. Some are more appropriately paired with younger ages, while others fit perfectly among the fifth- and sixth-graders.

It isn't until somewhere between fourth and roughly sixth grade when boys and girls are equally independent in how they confidently shop the aisles of a toy store or even a supermarket. Mom and dad are still a factor but kids have strong opinions and their parents listen. This is the age that they are aware of many brands and very strongly influenced by their peers. (Some children are more aware than others, but that is what makes this a very rich age to gain insights into their individualities.) It is also an enchanted age when they are acutely awake to their gender differences for obvious physical differences. Separating age groups is again an extremely important idea for this prepubescent age. The strongest reason is because boys heavily influence girls at this age. While boys aren't aware of their influence, girls need to be made comfortable without the conflict of having a cute boy in the room. Puberty for girls is definitely around in this tween age - ages 9 to roughly 12 years.

We are strangers

As a focus group moderator, we need to realize that we are strangers to these kids and their parents until we make them feel comfortable. Most parents of children younger than second grade will not allow their kids to attend a focus group alone with a stranger - even if we try. There are ways to work with parents and children under second grade-age but they are not nearly as effective as the focus group. Children of that age will require creatively-designed discussions that involve clearly stated, concise questioning and involve their parent as encouragement.

With the more protective nature of parents in today's society, a researcher should be careful to fully inform parents about the nature of the research in all screeners. Also, provide a letter prior to the groups clearly outlining the research purpose and nature of the activities in which their children will be participating. Make it comfortable for the child to speak their mind and allow the parent to understand what the interview is about and how their child's insights will be used. | Q

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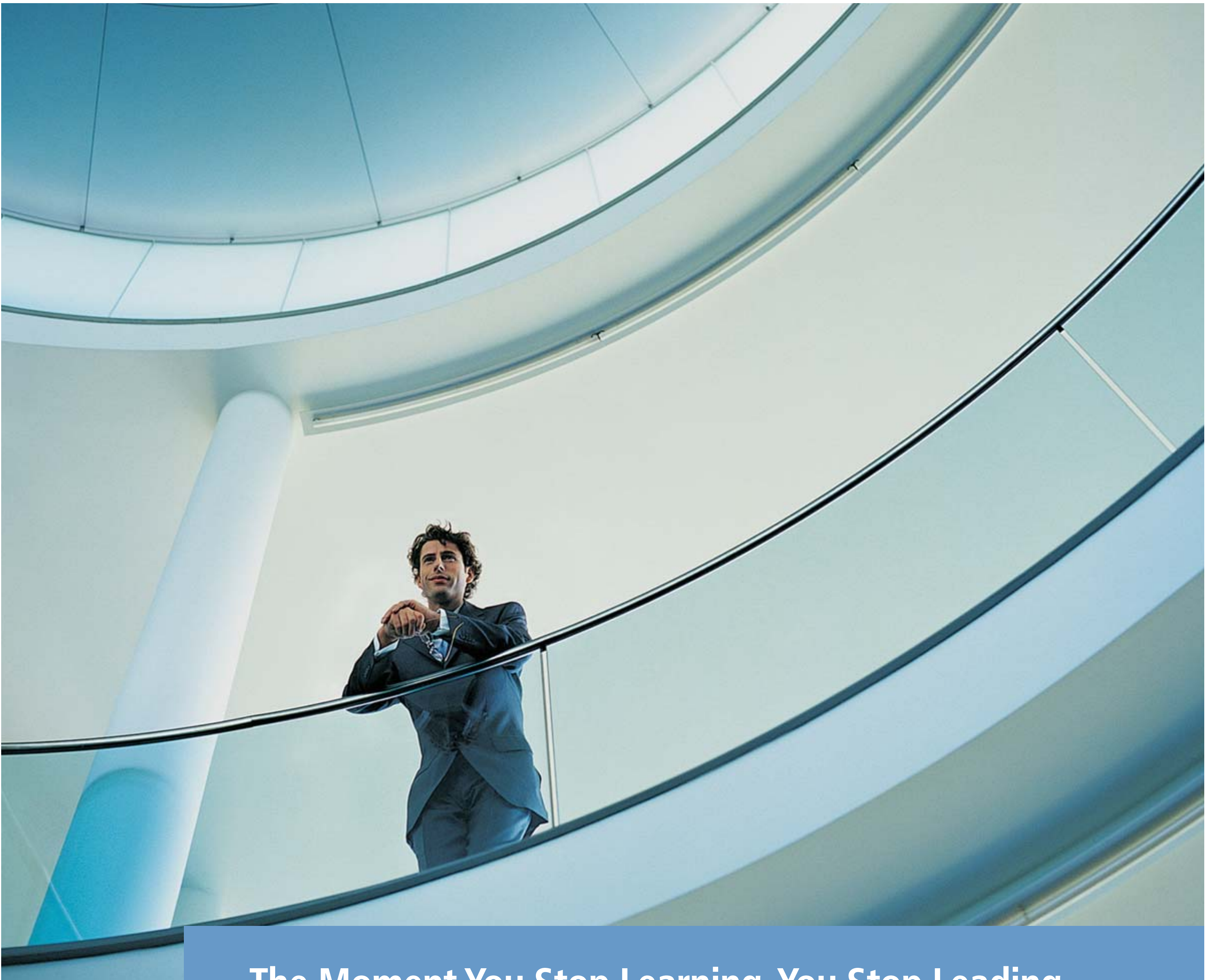

special markets

In search of niche markets

By Mitch Eggers

Today, online research offers all necessary ingredients to satisfy the thirst for rapid, accurate intelligence in today's highly competitive global marketplace: higher response rates, faster delivery of results and lower data collection costs. In 2005, ESOMAR estimated that panel research accounted for 28 percent of all global market research spend, second only to ad-hoc research at 51 percent.

The use of online consumer panels has grown in concert with the growth in online. While consumer panels are the most prevalent in global research, specialty panels are now also becoming more readily available. Enabling more precise audience segmentation and targeting, these unique online communities offer access to a wide variety of highly profiled target populations, special markets and audiences, categorized by profession, geography, ethnic background or demographics to name just a few parameters. This article aims to educate market research professionals on the many specialty panel possibilities available today and to help them make the right choices in terms of specialty panel vendor selection.

A how-to guide to using online specialty panels

Internal or outsourced?

Getting started in specialty panels begins with making a fundamental choice between developing an internal proprietary panel or outsourcing panels from an established and respected panel provider.

Building a proprietary specialty panel

The success of this endeavor will very much depend on the amount of existing data already available in a customer contact or CRM database. While this provides an excellent start, there's much more to running a proprietary panel than meets the eye, and it is a little bit more complicated than simply sending an online survey to a list of contacts. You should begin by selecting and purchasing robust panel management software to effectively create and run a panel. Make sure you minimize personnel requirements: look for a solution that is user-friendly, scalable and which automates as many tasks as possible.

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Creating your own specialty panel

Begin by defining the panel attributes needed to screen for the right panelists and ensure you are generating the data you want. For each attribute, define validation rules to ensure data integrity and contact frequency to control respondent fatigue.

Respondent portals

A fully custom respondent portal, built from scratch, can take months to complete. Moreover, you may need multiple respondent portals, each tailored to a particular audience with its own look and feel. Outsourcing the initial respondent recruitment portal work to an outside specialist vendor can shave weeks off the development process, depending on the size and complexity of the project, and enables you to focus on your core competencies in the meantime.

Recruiting

A great database doesn't necessarily mean every contact it includes will opt into your specialty panel: you need to drive the effort with effective panel recruitment campaigns. Start by designing multiple campaigns using a variety of stimuli and send them to prospective recruits. Run some tests, compare cooperation rates and optimize your campaigns. A campaign for skateboarding enthusiasts will require a much different approach than the one for working moms!

Incentives

Offering attractive yet cost-effective incentives to keep your panelists actively engaged is key to your specialty panel's long-term health and success. Leverage your panel management software to automate the whole process of crediting incentives for survey participation, managing a gift inventory and providing an online shopping environment for participants to spend their points or other survey reward. The online lottery approach is also a good way to ensure high panelist participation.

Customer service

Panelist retention is a recurring issue. Treat your panelists like you would your customers. Timely service and assistance will ensure your panel is responsive, considerate and compliant with security and privacy best practices. Maintain a central history of inbound and outbound panelist communication - along with their individual profiles - so that you have a 360-degree view of each of your respondents.

Buying a specialty panel

Outsourcing specialty sample from a third-party panel provider has one main advantage: you don't have to take on the work associated with building, incentivising and actively managing the panel. Beware of imitations though, as not all specialty panels are equal. The onus is on you to critically assess the quality and integrity of the respondent profiles and collected data. A true specialty panel is recruited independently from highly qualified sources, not just profiled out of an existing general consumer panel, a mistake often made by panel providers.

A current area of concern in online sample is fraudulent panel activity, including identity fraud, multiple profiles, speeding and survey bots to name just a few. Fraudulent panel participation has the potential to dilute the credibility of the entire online market research industry in the eyes of both clients and the general public.

Here is a list of questions you can ask panel vendors during the selection process to help you make a fair assessment of their specialty panel quality:

• Is your panel an actively managed, nurtured community or just a database?

• Do you manage your panel in an ongoing fashion? How?

• What reach (number of respondents) can you provide with your panel?

• In how many, and in which, countries do you have panels?

• Do you communicate with your panelists in their native language?

• What is the percentage of active members in your panel?

• How do you define active members?

• Where are your respondents sourced from, and how are they recruited?

• Have your panelists clearly opted-in? If so, was it a double opt-in?

• What exactly have your panel members been asked to opt into?

• Is your panel used solely for market research purposes?

• What incentives do your panel members get in exchange for taking surveys?

• Do you have a strict privacy policy in place?

• Do you offer specialty panels (B2B, youth, medical, IT, gamers, etc.)?

• What research industry standards does your panel comply with?

• Is your panel compliant with all regional, national and local privacy laws?

• What sociodemographic information do you collect on your panel members?

• How often is your panel updated?

• In what other ways do you profile your panelists?

• How often do you ask your respondents to update their profiles?

• What are likely response rates, and how are those response rates calculated?

• Do you guarantee a response rate (over and above screening)?

• How often are individual panelists contacted for market research?

• How is the sample selection process for a particular survey undertaken?

• Is your sample randomized before deployment?

• What is the minimum/typical turnaround time from first request to e-mail deployment to activate a study using your panel?

• How do you control sample deployment (as batches, by time zones, etc.)?

• Can you control the time of sample deployment, and if so, how do you do it?

• Can your panelists be directed to specific sites where they take the survey?

• What safeguards do you offer against cheating or click-happy respondents?

Unique challenges

Each online specialty panel brings with it a unique set of challenges. Let's take a look at a few specific examples of popular panels illustrating some of the pitfalls to look out for.

Youth panels

Today's youth not only influences purchases, but has extraordinary buying power of its own. Last year, global youth spending amounted to $395 billion, growing at a rate of 15 percent per year. In the U.S. alone, the teen market represents $200 billion (source: www.kidshopbiz.com). Market research professionals wishing to leverage such a panel should be aware of restrictions and legal regulations on research methods for children. In the U.S., youth panels should comply with regulations and guidelines by the Children's Online Privacy Protection Act (COPPA), which applies to the online collection of personal information from children under 13. In addition, Children's Advertising Review Unit (CARU) reviews and evaluates child-directed advertising in all media and online privacy practices as they affect children.

To ensure unbiased, quality responses, youth panelists should be recruited from domains they dominate, by double opt-in, with age confirmed multiple times, and parental consent garnered during the registration process. Questions need to be age-appropriate and carefully screened for subject matter to ensure a positive online experience.

Fun and unique incentives are required to motivate kids. Games can be offered on the panelist recruiting site, along with loyalty programs and newsletters to keep the young panelists engaged. Participation in weekly polls also lets panelists share their ideas with each other and maintains a sense of community.

Business-to-business panels

The main challenge with B2B panels is met at the panelist screening stage. Let's take the example of an IT panel: IT professionals can't simply be culled from a consumer panel, but must be specifically recruited in the context of their work environment, such as through a specialized trade organization or online business journal where they are already part of a professional IT mindset. They not only need to be well-compensated for their time, but also motivated by the opportunity to influence the direction of IT research and product development. They'll want assurance not only that their views are valued and influential, but also that they are participating in a highly secure environment that protects their privacy, including their contact and personal information.

Hobby-focused panels

Avid hobbyists present market researchers with specific challenges and opportunities when creating research methodology. Take the gamer community, for example: panelists are already profiled by game consoles owned and game product usage. Once preferred panelists have been selected, consider taking advantage of some of the interactive methods now available to build on their interest: Flash technology enables you to build in animated graphics and imagery, making surveys fun, dynamic and more game-like. This can considerably boost response rates and enhance the quality of the collected data. Simulate a game environment, create a virtual shopping experience to assess purchase decision-making, or use click testing to evaluate TV, print, outdoor or other advertising media.

Ethnicity panels

Although typically harder to reach, these audiences represent attractive, rapidly growing markets for today's researchers. Let's take the example of Hispanic-Americans and Latinos. With 16 million Hispanic Internet users in the U.S. by 2007, this segment represents 8.4 percent of all users, according to a study conducted by eMarketer in 2004. Latin America ranks fourth among total Internet users worldwide. The Hispanic population is not only big, representing enormous purchasing power, it is also complex and constantly changing. To address these complexities, accurate segmentation is crucial. In the U.S., the Hispanic population is made up of immigrants and third-generation Americans, Spanish-dominant and those who speak only English. The "Hispanic" population as such represents 22 different countries of origin, from Mexico and Central America to South America and Europe. Each segment of this audience represents differing values, customs, behaviors, attitudes and spending habits. To be effective, online Hispanic panels must provide opportunities for panelists to express their opinions about topics that are relevant and important to them specifically, providing the knowledge and insights to connect authentically with the various segments of this complex audience around the world.

Another perfect example is African-Americans. When it comes to market intelligence, African-Americans are a woefully under-represented group. It is crucial that the development and approach of this type of panel be fundamentally influenced by the African-American community directly. The panel must provide a safe, secure and confidential forum for African-Americans to express candid opinions. These consumers are motivated by having a voice in the decisions that influence the products and services that will ultimately be aimed at them.

Medical panels

Whether conducting a clinical trial or needing respondents for an online medical study, market researchers increasingly rely on the real-time opinions of physicians, nurses and chronically-ill patients. Each of these medical audiences is motivated differently and presents unique challenges. Extensive profiling is required to be able to select medical professional sample by specialty, geographical location, or, in the case of patients, by chronic illness type and stage. The same goes for incentives. Physicians of the quality and caliber that most market researchers desire are unlikely to be motivated by cash alone, even with a substantially increased incentive. The trick is to offer other types of rewards besides pure cash that are directly related to the medical profession, e.g., tools that save one of a physician's most valuable resources - time. Patients, on the other hand, may be more likely to be motivated by humanitarian or altruistic concerns of advancing research on their particular disease or disorder.

New mothers

This audience is possibly one of the most outspoken groups a company can target, one that is very eager to share their opinions on babies and young children. New mothers are also very busy, hence the need to avoid wasting their time and make it worth their while. Facing the expenses of a new baby, new mothers will be choosier in terms of panelist rewards and are likely to be more receptive to cash rewards than lottery prizes.

Looking ahead

Reaching special markets and audiences in real time is now easier than ever before thanks to online research and online specialty panels. According to ESOMAR's Vision 2010 report, online research will continue to revolutionize a global market research industry now worth close to $24 billion and become more popular due to cost advantages, ease-of-use and increasing broadband connectivity. Therefore online specialty panels are here to stay and will improve over time to meet the increasingly sophisticated needs of market researchers worldwide. | Q

research software

Online makes more inroads

By Tim Macer
and Sheila Wilson

A report on the 2006 Confirmit Market Research Software Survey

Now in its third year, and reported in *Quirk's* for the second time, the 2006 Confirmit Annual Market Research Software Survey provides a unique snapshot of the trends and changes happening in the marketing research industry's use of technology. The survey is carried out independently and anonymously on behalf of Oslo-based research software maker Future Information Research Management (FIRM) by London-based consulting company meaning ltd. following professional research standards. The 2006 results are based on a representative sample of 213 senior managers or owners of research companies around the world, with a large representation from North America.

Researchers may not yet rank with physicians on the hard-to-get scale, but they still proved to be relatively elusive as survey respondents. However, we were reasonably happy with the 24.5 percent response rate we received, which proved to be well-balanced by area of responsibility, company size and global region.

We are most grateful to FIRM, who commissioned this research, for their permission to share these results with the readers of *Quirk's*. A longer report on the survey is available for download free of charge at www.confirmit.com/download/documents/research.

Online is ubiquitous

The results of the 2006 survey show that online research and the software to do it is now virtually ubiquitous even among the smallest research companies. They also chart the recent growth of mixed-mode research and indicate that that growth will likely continue strongly.

In our report, we will reveal some surprises in the reasons why companies are using mixed methodologies. We also expose some interesting global differences in how companies source their samples online and examine the rapid growth of emerging panel management software.

For the software suppliers, there is either encouraging or chilling news that a sizeable chunk of research companies are considering dumping their incumbent software for something offering greater flexibility and improved efficiency, amongst other reasons. As turmoil sets in for the suppliers, a crumb of comfort is that cost appears not

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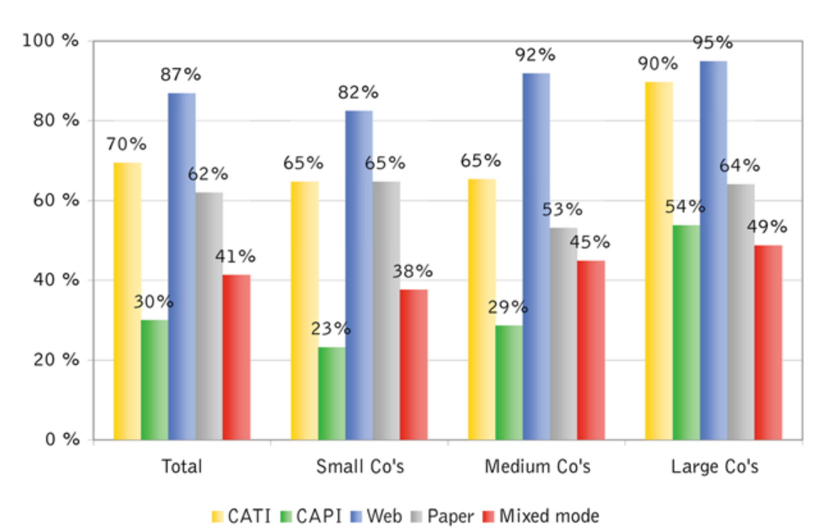
Figure 1



to be the driver.

• Research modes cited

In 2006, more research companies than in 2005 said they are using CATI and CAPI. In 2005, 65 percent worldwide used CATI and in 2006 this has risen to 70 percent. The figures for CAPI are 25 percent in 2005 and 30 percent in 2006. Admittedly, these are not major increases, but still they represent some growth where none was anticipated. It will be interesting to see if the numbers continue to rise when we repeat the survey in 2007.

There are no signs of paper surveys disappearing: two-thirds of companies still relying on them. But the emerging area is mixed-mode, which we asked about for the first time this year. At present it is probably best described as being important to a very sizeable minority of companies worldwide (41 percent). We found the most popular combination is, as suspected, Web and CATI (36 percent) with only 15 percent are doing other combinations of mixed-mode research such as Web/paper, CATI/CAPI and so on.

The extent to which either CATI or CAPI is offered closely follows company size. While many in North America have written off CAPI as a method, it is still practiced by 54 percent of large companies, but only 23 percent of small companies. However, even this figure is surprising, as our definition of small companies is those with revenues up to $1.5 million.

SMS research - using instant messaging on cellular phones - does not seem to have taken off, with a reduction in the proportion of companies offering this service - 6 percent in 2005, down to 3 percent in 2006. But it is worth noting that surveys on paper are still conducted by almost two-thirds of those in this study, with almost no variation by the size of the company.

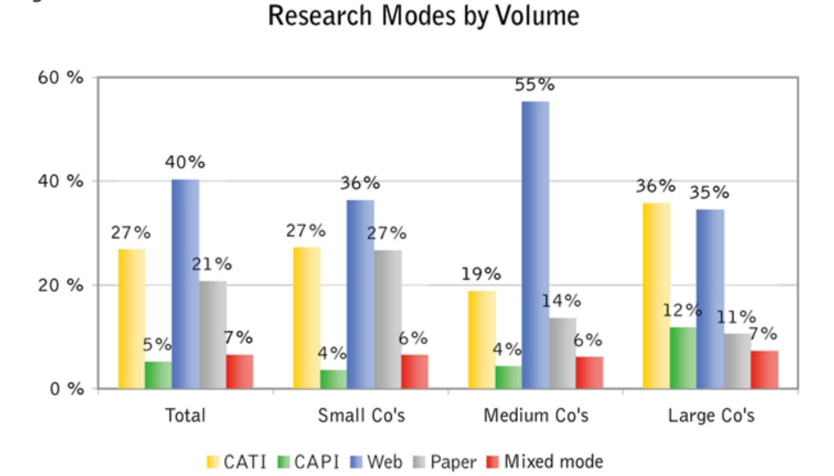
• Research mode by volume

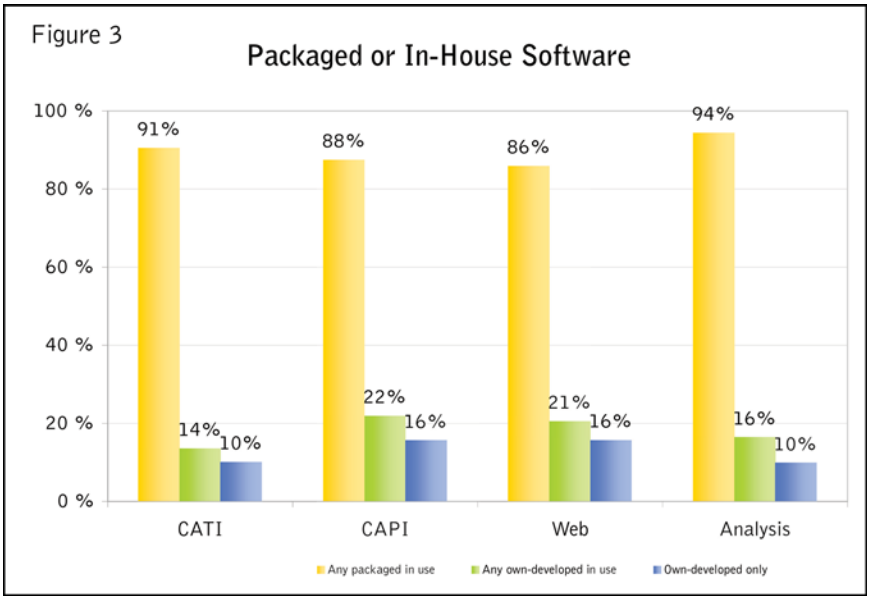
After asking which modes they had the facility to undertake, we also asked for the volume by each mode, using revenues as the measure rather than numbers of interviews. Figure 2 clearly shows where research companies earn most of their money: Web, CATI and paper together are the source of 88 percent of revenues from quantitative work.

It is in volume that CAPI appears truly diminutive, at 5 percent of volume worldwide, with mixed-mode surveys accounting for a slightly greater share (7 percent). However, with only one in three companies offering CAPI, against two in five offering mixed-mode, it looks as if there is more CAPI work around for the current capacity than there is mixed-mode work, at present. But for a method that many consider to be experimental still, 7 percent is a decent showing. It appears that this is an area where companies are offering the service now in anticipation of future returns. With CAPI, the situation is less clear. It accounts for as much as 12 percent of the revenues of larger research firms but only 4 percent of the smallest ones. Has CAPI research quite simply reached a plateau? If that is the case, we are curious as to why more companies seem to be offering it than in past years.

Several large research companies have made it clear in various public announcements they wish to dump the "old" methods in favor of lower-cost and faster online surveys. How interesting it is to find that it is the medium-sized companies that seem to have achieved this balance. A whopping 55 percent of their volume is online, with every-

Figure 2





thing else in the teens or single digits. Among large firms it is a fairly equal three-way split between CATI, Web and “the rest,” with CATI very slightly in the lead still.

Among the smaller and independent operators, Web is also taking the lead, nine percentage points ahead of CATI and paper. Perhaps an example of the advantages of piloting a sailboat rather than an oil tanker.

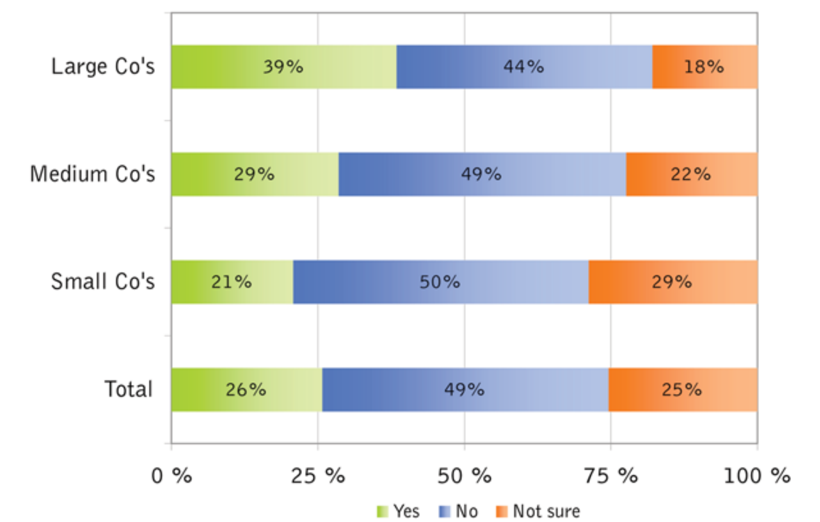
• Packaged software in use

Figure 3 should have developers of market research software scratching their heads in bemusement. Although most market research firms use only packaged software bought from a supplier, one in five of the developers’ potential customers are using software they have written themselves for online or CAPI work. For CATI, one in every 10 system out there has been knitted at home.

We continue to find it astonishing that so many market research companies are straying so far from their core strengths to develop and maintain their own software when there is such an abundance of applications of every kind on the market. The only justification can be where the demands are so unique that existing solutions cannot meet them. But we wonder just how unique can any one company’s data collection methodologies be in a world where the research buyers are demanding more consistency across the research they buy.

This is a market where many products in daily use are very long in the tooth. A lot of pre-Windows tools are still being used, for example. Compared to these tools, it is not difficult to build something in-house which is better. But that

Figure 4 **Plans to Change Software**



ignores the many products now available that use complex but ultimately powerful tiered architectures. While the result for the end user may be more versatile and easier-to-use software, the task for the in-house developer, without the resources of a software company behind him or her, gets harder.

• Changing software in the next one to two years

In 2006 we asked respondents for the first time whether they had plans to dump their existing software anytime soon. The strength of the "yes" we got took us aback. In Figure 4 you can see that only half (49 percent) of all companies are planning to keep their current software over the next one to two years. A quarter are planning to change their software and another quarter are undecided. Within large companies, these figures are even more striking, with under half (44 percent) planning to keep their software, but nearly two in every five are planning to buy new software within the next one to two years.

This shows that software manufacturers cannot take their customer base for granted because within a short time, many of their customers, especially the large ones who generate the most revenue, intend to be using someone else's software.

This could again be influenced by the slow pace of change in some of the tools widely used today, which have not kept pace with modern developments, and are showing their age. Fortunately, our next question was "why?"

• Reasons for considering a change in software

Our list of reasons (Figure 5) was derived from some qualitative research we had done earlier. The reasons cited are diverse and well-spread, though the leader is unsurprising. We considered it much more interesting that cost comes well down the list. This is at odds with the experience of most suppliers. Partly this can be attributed to the high cost of moving from one system to another: It is an expensive way to save costs. But Figure 4 shows the backdrop, where despite the cost of making a change, a quarter say they are likely to do so.

So beyond getting a better model and saving some money, the really revealing reasons are that more than half of the potential switchers are doing so to achieve efficiency improvements through automation and to modernize. By implication, they are saddled with tools which are labor-intensive, old-fashioned and not integrated with other tools or interviewing modes.

Many companies also want to use the same tool across all their activities or in all their offices (47 percent cited consolidating on one platform as a reason to change), which could be due to aspirations to having a mixed-mode solution, if not even extending to doing mixed-mode research, or be as a result of company merger and consolidation, of which there has been a lot of late.

At least companies do not feel constrained by company policy, as this was cited by just 16 percent of the sample. Though it came out as a minority reason, one in five companies were not happy with their existing supplier (not the software).

There are a diverse range of reasons for changing software, all of which are important. The most

Figure 5 **Reasons to Change Software**

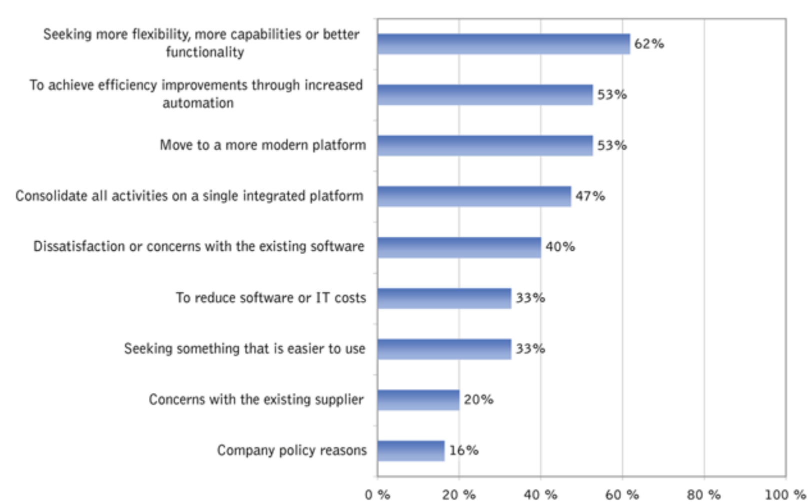
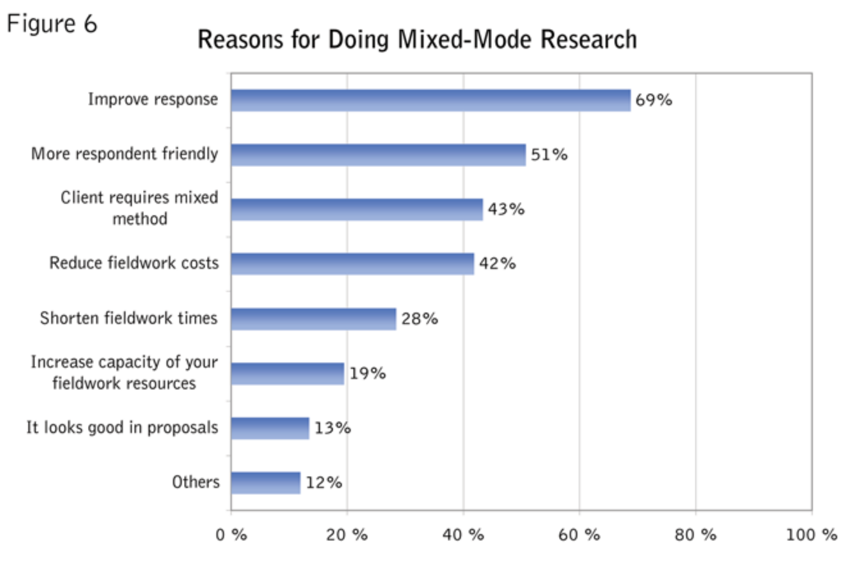


Figure 6



often cited reason for changing software is to seek "more flexibility, more capabilities or better functionality." Nearly two thirds of respondents chose this.

The reasons cited do seem to suggest that a decent proportion of market researchers place value on innovation and are not afraid of change. The top reasons typify aspirational thinking towards improvement, rather than reactive thinking brought on by being forced to change.

• Reasons for mixed-mode research

This is the first time we have asked respondents why they are doing mixed-mode research. Our results (Figure 6) show that contrary to common opinion, the main reason for mixed-mode research is not to cut fieldwork costs (although this is important to 42 percent of the sample) but the quality-related issues of increased response (both response rate and sample coverage), and improving the respondent experience - two factors which are closely aligned with combating the acknowledged decline in response rates and ensuring that research data are reliable.

Tellingly, 42 percent of the time it is the client who is driving the decision by insisting that the survey uses a mixed methodology approach. This perhaps reveals a somewhat reactive approach in the industry to mixed-mode methodology still.

We were heartened to see that 13 percent of our sample had the courage to admit that a mixed-mode pitch still looks good in proposals, among those early adopters that can do it efficiently without it pushing up the costs.

Figure 7

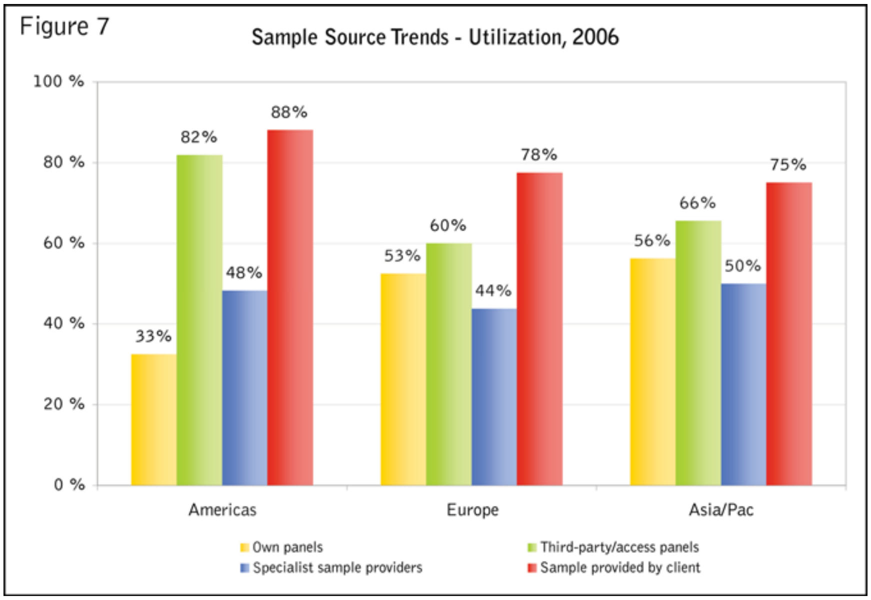


Figure 8

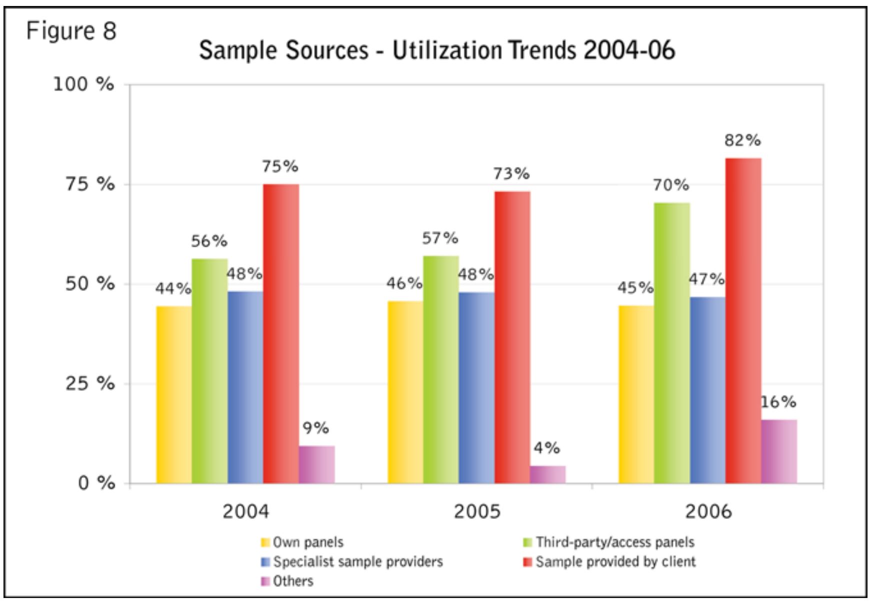
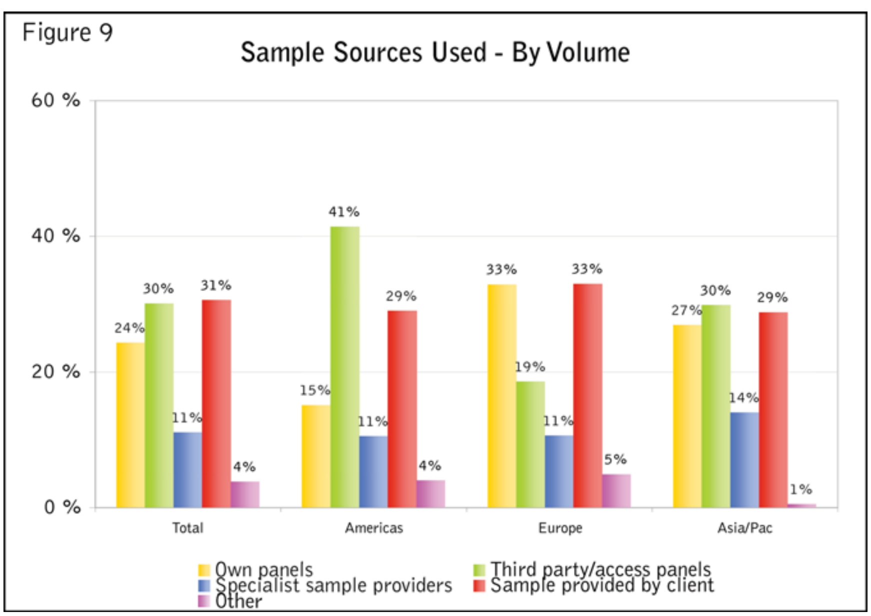


Figure 9



• <u>Which sources of online sample do you use?</u>

Our next three figures focus on panels: who is using what, how these are changing at present and what kinds of volumes are involved.

Though abundantly mentioned, the fact that agencies are widely using panels from their clients is not interesting in itself until we look at the volumes later on. Access panels continue to be more widely used in North America than they are in other global regions, where own panels are much more prevalent (Figure 7).

Around a third of companies in North America now have their own panels. But they are behind the rest of the world in this respect, with 53 percent and 56 percent in Europe and in Asia-Pacific, by comparison, having their own panels.

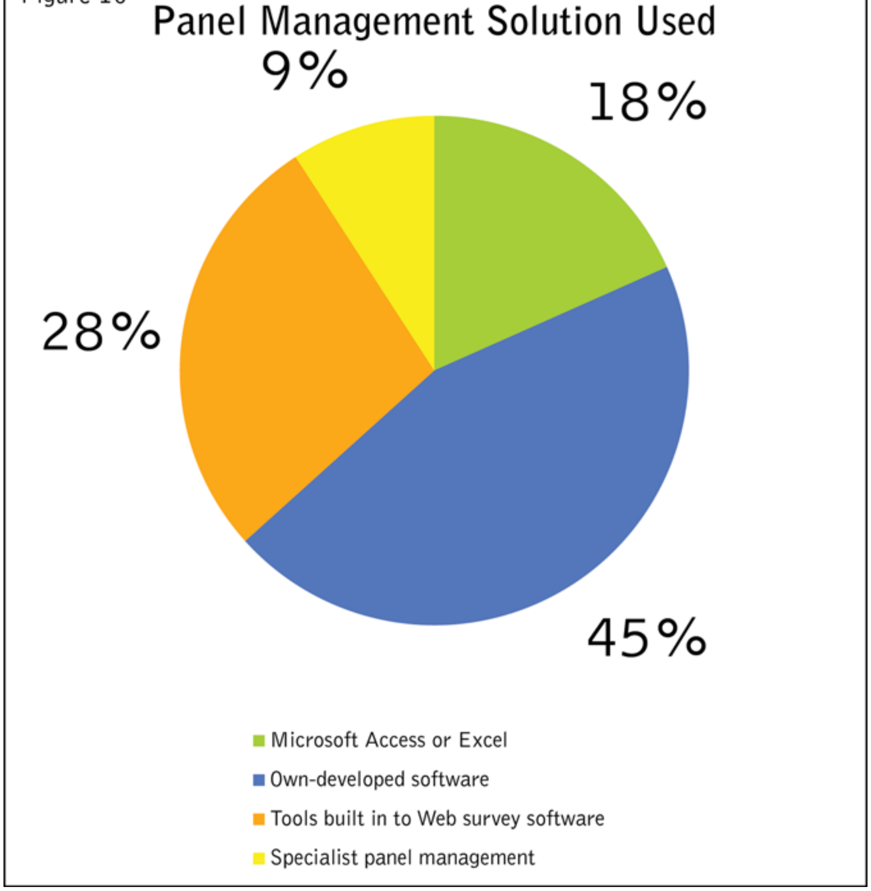
• <u>Online sample utilization trends 2004-2006</u>

In our previous two studies, respondents consistently anticipated making less use of client-supplied sample in the future. But this remains an unfulfilled aspiration. The utilization of client sample actually increased in 2006 (it was 75 percent and 73 percent in 2004 and 2005 respectively, and 82 percent in 2006), showing a widening gulf between hopes and actions. Previously, it also seemed that access panels were gaining in popularity and the 2006 results confirm the ascendancy of the rented panel. In 2005, 57 percent used access panels, whereas 70 percent used them in 2006 (Figure 8).

In 2005, our respondents predicted a modest growth in the use of own panels, but this too has not been the case: it was just under 45 percent then and still is now. The use of specialist sample providers has also remained static.

It is not clear to us why this gap between expectations and reality persists. There is likely to be continuing demand for research companies to work with samples supplied from their clients - almost always cus-

Figure 10



tomer lists, which cannot generally be obtained from any other source. But that does not explain why the dream to build their own panels is not being realized.

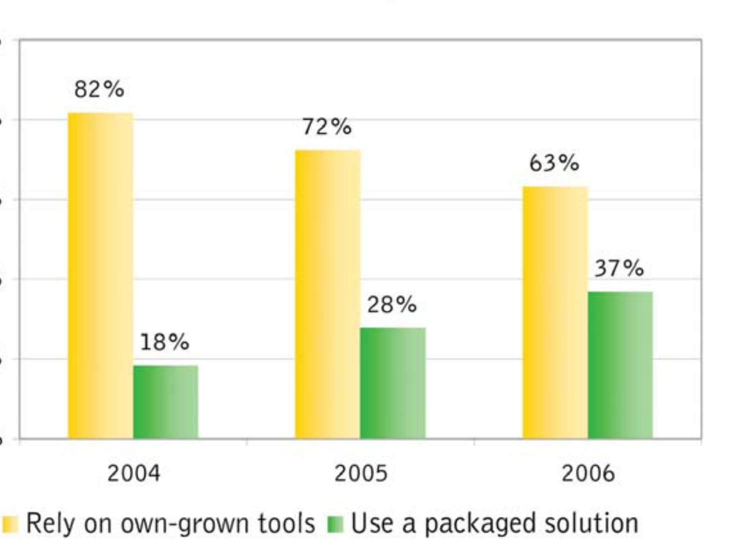
• Sample sources by volume

We already know that access panels and samples from clients are very widely used. What surprised us was the large proportion that client-provided samples accounts for: 31 percent globally and 29 percent in North America (Figure 9).

The specialist sample providers, though also widely used, supply only a minority (11 percent) of the total sample volume - a figure that does not seem to vary much by region.

There are interesting regional swings in the use of access panels and own panels. As seen in the utilization levels, access panels are popular in North America and far less so in Europe. The volumes actually amplify this difference, with North America, at 41 percent, driving through twice the volume of their

Figure 11



European counterparts, with a rather meager 19 percent.

Turn to own panels and the situation reverses, with only 15 percent of volumes in North America coming from proprietary panels, against 33 percent in Europe and even 27 percent in Asia-Pacific, where the two sources seem to be more in equilibrium.

There is an abundance of global access panels now, so the low uptake in Europe is more likely to be due to active choice or other considerations such as control, quality or cost, rather than scarce availability.

• Software tools used for panel management

Figure 10 appears to show a golden opportunity for software developers, with very few people using off-the-shelf panel management tools. Nearly half of respondents report using their own in-house software for panel management. And a sizeable minority are still using office automation tools such as Microsoft Excel or Access, which offer poor quality control, no audit trail and considerable scope for human error.

There has, until recently, been very little choice in commercially available software tools, and the functionality provided in online survey tools too often lacked luster, and many were more about connecting the panel to the survey rather than actively managing the panel. Hence, many people have built their own tools or made do with Access and the like.

However, as Figure 11 shows, this is now changing rapidly.

• The growth in panel management software

One of our more dramatic findings this year is the marked rise of packaged solutions for panel management, and the extent to which this is displacing the own-grown tools.

The panel management opportunities for software manufacturers were probably better last year, but remain good for a few years to come. For anyone developing a standalone product for panel management, they may not be as golden an opportunity as first appears.

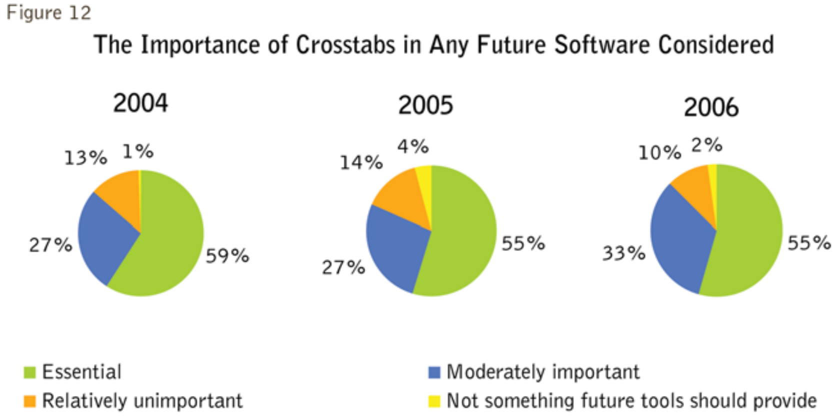
Closer examination of Figure 10 shows that there is already a clear move away from using in-house solutions and towards using the panel management capabilities in software provided by software developers. Nevertheless, the use of supplied panel tools has doubled in two years.

• How important are printed crosstabs?

In Figure 12, we look at the analytical side. For those of you dying to stop shifting large piles of paper around your workplaces and save trees, disappointment is clearly at hand. Most respondents still consider printed crosstabs essential or moderately important. This figure has actually slightly increased since 2005.

Though crosstabs are still considered important, it was shown in another question that they are now a minority delivery method because less than one in four (23 percent) of projects continue use crosstabs as a delivery method. PowerPoint slides continue to be the most popular deliverable, accounting for 48 percent worldwide and 52 percent in North America. True electronic methods remain in the minority: static online reports are used on 22 percent of projects in North America and in Europe, but just 11 percent in Asia-Pacific. Interactive delivery via data portals or specialist software accounts for only 11 percent of volumes worldwide, and 10 percent in North America. | Q

Figure 12



Can you move your finger from a to b?

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A look at just-about-right scales in consumer research

By Richard Popper
and Jeff Kroll

New-product introductions are critical to the growth, continuing success and competitive strategies of packaged goods companies. In order to improve the odds of having a successful launch - whether of an innovative product or a line extension - companies routinely incorporate consumer feedback in the product development process and obtain consumer reactions to product prototypes as they emerge from R&D. Whether it's food, beverage or personal care, the stakes involved are so high that this investment in consumer research not only makes sense, it's probably a necessity, and it can spell the difference between success and failure.

The research tools employed in the pursuit of a winning product formulation run from the simple to the highly sophisticated. The primary objective, however, is the same: provide the product development team with direction on how to increase consumer appeal.

In product categories where sensory properties are important determinants of consumer appeal, one of the most simple and direct ways to solicit feedback from a consumer is to ask whether a product is just right with regard to a certain characteristic or has too much or too little of that characteristic. These just-about-right scales can be effective in research on food and beverages, where consumers, in addition to rating their liking of a product, are asked to evaluate a product on a number of attributes using this question format.

Following is an example of a five-point just-about-right scale used in product evaluation. Other versions of the scale employ three or seven response categories, with the middle category labeled just-about-right.

Much too strong
Somewhat too strong
Just-about-right
Somewhat too weak
Much too weak

For example, in a study of carbonated soft drinks, consumers might be asked to evaluate the prototypes with regard to sweetness, strength of flavor and carbonation level (among other characteristics), indicating each time whether the level is too low, too high or just right. Based on consumers' answers to these questions, the soft drink manufacturer might adjust a prototype's sweetness, flavor and carbonation in an effort to improve its acceptability. Respondents tend to answer just-about-right questions with ease and researchers like the simplicity of the scale. Yet despite

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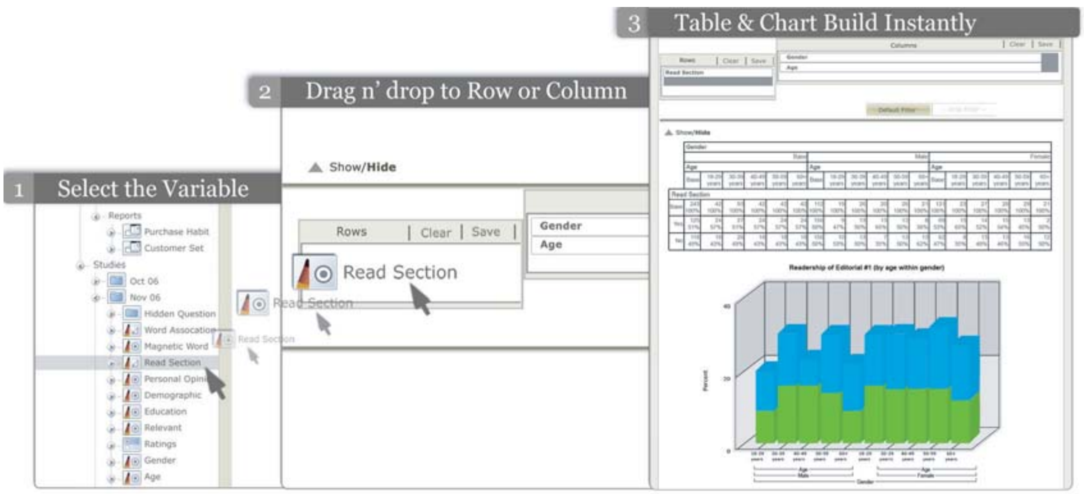

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their intuitive appeal to researchers and research participants alike, these scales are not without limitations and potential pitfalls, and their results require careful interpretation.

Ideal sweetness

In order to rate sweetness using a just-about-right (JAR) scale, respondents must decide how closely the sweetness of the product they are tasting matches their ideal sweetness. There can often be a disparity between the product formulations consumers will rate as just right and those that they actually like the most. Epler, Chambers and Kemp (1998) asked to evaluate five lemonades differing in the amount of added sugar. Consumers rated the product using either a JAR scale that ranged from "not sweet enough" to "much too sweet" or rated their liking of the sweetness on a scale that ranged from "dislike extremely" to "like extremely." The optimal sugar concentration was determined in two ways: by identifying the formulation whose average JAR rating was closest to "just right" and by identifying the formulation with the highest average liking score. Using the data reported in that study, Figure 1 shows how the optimal levels can be determined using each measure.

For the JAR scale, the optimal sugar concentration was about 9.5 percent; for the overall liking scale about 10.5 percent. While the difference may seem small, it was large enough to make a difference in a preference test. A separate group of consumers, when presented with the two formulations, preferred the product optimized on the basis of liking over the one optimized on the basis of the JAR scale.

In another study the disparity between optimizing a formulation based on a JAR scale versus a liking scale was even greater. Optimizing the level of aspartame in a fruit drink on the basis of a JAR scale for sweetness predicted an optimal level of aspartame 20 percent lower than that predicted on the basis of overall liking (Popper, Chaiton and Ennis, 1995).

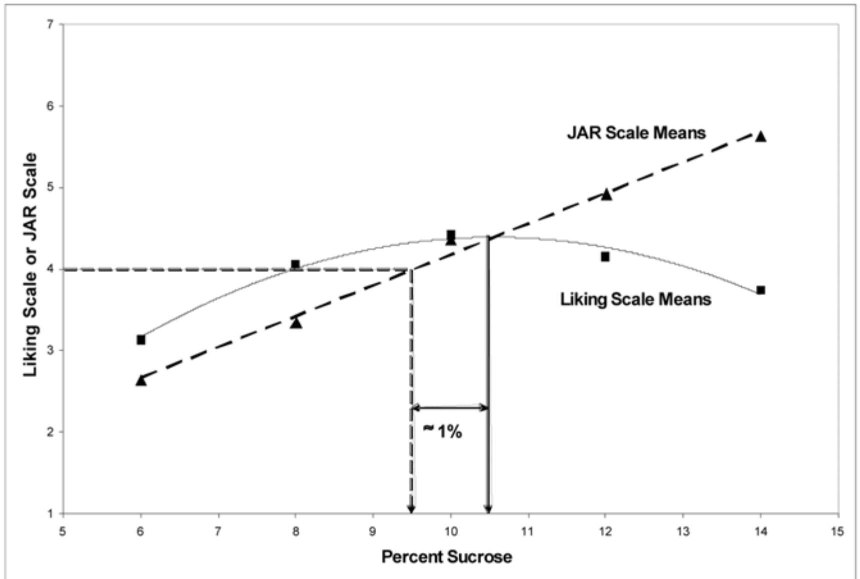

Figure 1: Optimal sucrose level in lemonade determined using a seven-point liking scale (solid line) and a seven-point JAR scale (dashed line). The optimum sucrose level is the level at which the liking curve reaches its maximum or the JAR line equals 4 (just-about-right). The difference in the optimal values is approximately 1 percent. Source: Epler, et al., 1998.

Does just-right equal most-liked?

When products vary in more than just one dimension a similar question arises: Is the formulation that maximizes overall liking the same as the formulation for which the sensory characteristics are all just right? In some instances (Moskowitz, Munoz and Gacula, 2003), a product that was just right on all attribute measures was not the same as the product that was liked the most, although it was still an acceptable product; in another instance (Marketo and Moskowitz, 2004), the two methods gave similar results.

One possible explanation, advanced by Epler et al., for the discrepancy between JAR and liking scale optima is that JAR scales induce a response bias when the attributes carry certain negative health connotations. In the case of sweetness respondents may perceive a very sweet product as being unhealthful. When tasting such a product, they may say it is "too sweet" because they are aware of the potentially negative consequences of consuming such a product on a regular basis. At the same time, they may actually like the way it tastes, which is reflected in their hedonic ratings. Only one study (Bower and Baxter, 2003) has attempted to confirm this hypothesis by comparing JAR and liking ratings of sweetness among two groups of respondents that differed in their concern with "healthy eating." Unfortunately, the results were inconclusive.

While health concerns may or may not be a source of response bias in the use of JAR scales, experienced researchers know that there are certain attributes that, by their nature, are likely to induce a response bias. It is hard to imagine that an orange juice could have too much "fresh orange flavor," and many respondents would rate the level of fresh orange flavor as "not enough" regardless of the formulation. Similar biases may exist in the case of the amount of chocolate chips in a chocolate cookie or the amount of cheese on a pizza. In both instances, researchers can expect respondents using a JAR scale to express a desire for more, even though their liking ratings may begin to decrease as the level of chocolate chips or the amount of cheese rises above a certain level.

The reverse skew can also occur, say when respondents are asked to rate the bitterness of coffee: the responses will skew towards too much, since bitterness is considered bad. However, a certain amount of bitterness may actually be a positive in terms of overall liking, JAR ratings to the contrary.

What direction to product development do JAR ratings provide? Consider the results for a hypothetical product shown here (ratings of a carbonated soft drink on three just-about-right scales, summarized in terms of the percentage of respondents rating the product just right, too low, or too high).

The results suggest that the sweetness and citrus flavor of the product should be increased; less clear is whether the carbonation level should be raised. The results definitely do not tell the product developer how much of a change in sweetness, flavor or carbonation would be required to increase the just-right percent. It is tempting to conclude that a bigger increase is needed in the case of citrus flavor than sweetness since the percentage of too-low responses is greater for citrus flavor than for sweetness. But that is not necessarily the case. The sensitivity of the JAR scale to formulation changes is usually not known and may differ by attribute (Moskowitz, 2004). It might require only a small increase in flavor but a large increase in sweetness to address the perception that these attributes are too low. And it is not known whether such increases would alienate respondents who currently view the levels of these attributes as just right, leading to a greater percentage of future respondents rating the product too sweet or too high in citrus flavor. Finally, the possible interaction among attributes needs to be considered when making formulation adjustments (increasing the citrus flavor may change the desired level of carbonation).

It is also tempting to conclude from the results that an increase in citrus flavor has the greatest potential to improve the overall acceptability of the product, since this was the shortcoming noticed by the

Carbonated Soft Drink Ratings

	Too Low (%)	Just Right (%)	Too high (%)
Sweetness	30	55	15
Citrus flavor	50	40	10
Carbonation	22	65	13

greatest percentage of respondents. But this conclusion could also be erroneous. Consumers might be more tolerant of deviations in flavor level than they are in sweetness, making sweetness the higher priority in terms of reformulation. Furthermore, even though the overall level of satisfaction was greater for carbonation than for the other two attributes, it is possible that for those that considered the carbonation too high or too low, this shortcoming was a bigger detractor than anything else.

Link to liking

Such interpretive difficulties underscore the need for researchers to link the just-about-right ratings to the respondent's level of liking. Using one of several analysis techniques, it is possible to rank order the shortcomings in terms of their importance to overall liking, thereby focusing the attention of product development on the critical attributes. In some cases, an attribute garnering a relatively moderate percentage of complaints (e.g., carbonation too low) may be shown to have a high impact on the overall liking of some respondents.

While a more in-depth analysis can make the results from JAR scales more actionable for the product developer, including JAR scales may still be problematic, as was demonstrated in a study by Popper et al. (2004). In the study, respondents rated their overall liking for four dairy desserts. Some respondents rated only overall liking. Other respondents, in addition to rating their overall liking, rated the products on a series of JAR scales, such as sweetness, thickness and flavor intensity. The study showed who the respondents that answered the JAR scale questions rated their overall liking of the products differently than those who rated only overall liking.

If JAR scales are biasing respondents' overall evaluations of products, then including them in studies designed to measure a product's overall liking may be ill-advised. Popper et al. (2004) found that intensity scales, which ask respondents to rate the level of sensory intensity on a scale from low to high, did not have the same biasing effects that the JAR scales did, even though the same attributes were being rated. The difference between the two scale types is that in answering JAR questions respondents need to consider how products differ from an ideal, which may focus them on reasons why they like or dislike a product, something that intensity scales may not. Other research (Wilson and Schooler, 1991) has shown that asking respondents to consider reasons for their preferences may subsequently alter their preference choices.

Why so popular?

With the difficulties surrounding the use of JAR scales (see note below), why do they remain so popular? One reason is that alternative research methods can be more costly. Systematically varying a number of key formulation parameters and inferring the optimal formulation from the overall liking responses may require more prototypes than the product development department thinks it has the time or money to produce and test. Similarly, formulation direction based on a correlation with intensity ratings, whether collected from consumers or from a trained sensory panel, also requires a fair number of prototypes or in-market products in order to be robust. Compare that approach to one of testing only one or two prototypes (and maybe a competitor) and using just-about-right scales for formulation direction, and the appeal of just-about-right scales for product development is immediately apparent.

JAR scales do not give the specificity of direction that product development often requests, which can lead to inefficient testing-and-retesting in order to get the formulation right. Nevertheless, just-about-right scales, in the hands of knowledgeable researchers and along with the appropriate analyses, can do a just-about-right job of serving as a scorecard for comparing a number of products and indicating areas where there are major product deficiencies. | Q

Note: This article discusses some of the limitations and caveats surrounding the use of just-about-right scales. A subcommittee of ASTM Committee E-18 is drafting a detailed guide concerning the benefits and risks associated with the use of just-about-right scales. That document will also include examples of the statistical analyses most appropriate for JAR scales.

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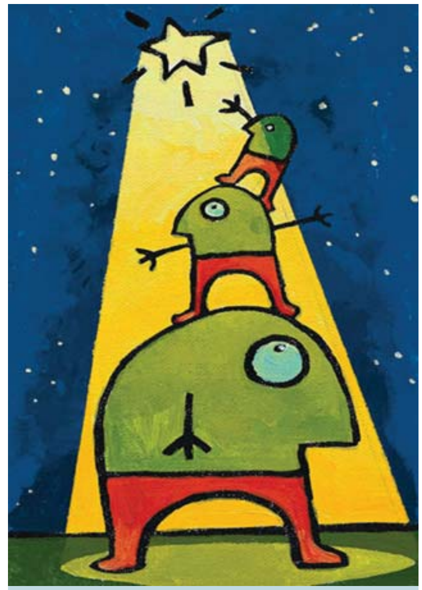
the business of research

Family matters



By Michelle Finzel

Market research companies as family businesses

In its long history, TV has produced many memorable nicknames. The Cunninghams were friends with the Fonz; Gilligan was affectionately referred to as Little Buddy; and seemingly every character on *The Sopranos* goes by some catchy second name (many of which can't be repeated here).

Life must imitate art, then, for around the East Coast research market, I too have been given a nickname. It was bestowed for my position at Maryland Marketing Source Inc., the research company at which I work. Around these parts, I'm known as The Daughter.

This nickname caught on more and more as I was introduced around after having joined my mother at her market research company. Often I was greeted with a handshake, a smile, and the cordial affirmation, "Oh, so you're the daughter!"

But what does it mean to be the daughter? What does it mean for both my mother and me, members of the same family as well as the same small business? This question has likely been asked by many people in the research industry, which seems to have more than its share of family businesses.

So what are the answers? Well, I can't give you a one-size-fits-all answer. It really depends on each person, each family and each company. What I can offer, however, are some tricks of the trade, some nuggets of knowledge that may help keep your organization successful while also leaving your family tree with all of its limbs intact.

• Discuss expectations and define roles

Before any final decisions are made by both the joiner and the joinee as to whether adding more family members to the company is a good idea, all parties need to talk about what each expects for themselves as well as from each other. It could spell personal and professional disaster if expectations aren't being met because they weren't formally set ahead of time. Everyone needs to discuss each other's plans, priorities and goals because it's amazing just how surprised you can be by what you thought was important to those close to you and what actually is.

According to Barbara Bridge, my mother and president of Maryland Marketing Source Inc. and Bay Area Research LLC, this too can become a family event. "Before I invited Michelle to join the company, I discussed it with my husband and my father, Michelle's father and grandfather. And I know she talked with her husband and friends about it as well." The input

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of those closest to you is invaluable. They can help you weigh the pros and cons of whether to combine efforts at work because they have been observing your relationships for quite some time and can probably be considered experts on the matter. And since they are also going to be affected by whatever decision is made, they may appreciate the opportunity to share their thoughts.

Further, openly and honestly discussing your expectations allows you to clearly and concisely define each person's role within the organization. Says Merrill Shugoll, president of Shugoll Research and daughter-in-law of company founder Joan Shugoll, "Make sure you have a defined role, and are not stepping on other family members' toes. Be collaborative not overlapping." If each family member is given their own specific path to follow, the company will grow as everyone moves parallel with one another. With too many intersecting points there could be some difficult crossroads.

• <u>Create your own space</u>

A good way to keep from stepping on anybody's toes is to make sure you physically stay off of each other's feet. As a family you may be very close, but spending too much time together will strain any working or familial relationship. Having your own working space is just as important as having your own living space. Though you are related, you are individuals and need your own area within which to be creative and productive in your own ways. Plus, let's face it, we all have those days where we just need to retreat into our own corner (or wish someone else would) and knowing that you each have a safe place of escape helps create a non-hostile, comforting work environment.

• <u>Keep family life and business life separate</u>

I know it sounds easy, but it's much harder than it seems. When you're face to face with a person or people whose life directly impacts yours, it's difficult not to talk about it. The temptation is always there. Try to fight it, though, because your co-workers probably don't want to hear about every birthday party and shopping excursion, and those joining you at the dinner table will feel left out of the shop-talk conversations.

Mixing business with pleasure can also be more than an annoyance to those around you. It can cause undue stress on relationships both at home and at work, especially if a situation escalates. Family members who work together must be able to leave domestic quarrels at home and office issues at work. Life includes disagreements, especially when it comes to your family and your career, but conflict doesn't have to be negative.

As was the case with my mother, and with Joan Shugoll, the business of market research happened by accident for them, but the companies they built didn't. Welcome moments of differing views as a chance to collaboratively discuss and discover how each generation's experience and education can contribute to the success of the company. Discuss all ideas and explain to each other why you may agree or disagree with each one.

Without learning the why of a decision, a new addition to the company cannot begin to understand the what. And if tension begins to get too thick, perhaps bring in an unbiased third party to help mix it up a bit. Once a problem is dissected into individual pieces, it is usually easier to understand and then solve. As Joan Shugoll said to me of her experience working with her son and daughter-in-law, "Sometimes you know more than they do, and sometimes they know more than you do. If you disagree, you'll find a way to work it out and live happily ever after."

• <u>Offer and accept criticism and praise</u>

Both praise and criticism are integral to the growth and success of every employee. Outstanding work should be recognized as such and improper behavior cannot be allowed to continue. Easy, right? For some maybe, but many people find it difficult to provide feedback, especially negative feedback. This is further amplified when the person who needs to adjust is someone whose pain you also feel, or whose ego can drive you crazy.

No one is perfect, regardless of what any proud parent might wish to think. If criticism becomes necessary, both parent and child (or whatever the relation) should try and remember that the best interest of the organization must remain at the forefront of everyone's priorities. Be open to the information given and received, and take time to think everything through before reacting. Taking time to mull everything over allows you to deal with and move past the initial emotional reaction, so when it's time for discussion or taking action, all parties know they are doing so without being too defensive. Again, I know it sounds simple, but when placed within the situation it can be difficult to fight one's own emotional reaction.

It is similar when offering praise for a job well done. Some relatives find it tricky to present other family members with high praise. Just as we don't want to totally deflate a person with puncturing criticism, we also don't want to overinflate anyone's ego and create the proverbial monster - family can often be more sensitive to this. Also, you don't want to find that you have to contend with the concern as to whether or not the praise is deserved (by coworkers or by the relative receiving the praise). But as any good leader would most likely advise, as long as both the praise and the criticism are balanced and consistent, the message should be effective and successful. "When I had to pass along client criticism to my daughter," says Barbara Bridge, "it honestly did hurt me more than it ever had with other staff members. Conversely, passing along client praise makes me feel doubly proud, both as a boss and as a mother."

• <u>The big question: Inform the clients?</u>

As is always the case, the possible answers to this question are not without their own pros and cons. On the one hand, some clients find a family-operated organization to be warm and inviting. They may view your organization as one they can trust and believe in your willingness to work hard. This could possibly open the door for more long-term business relationships to develop. On the other hand, complications could occur where a client may doubt credibility, feel outnumbered or possibly worry about their ability to be honest for fear of hurting anyone's feelings. This general feeling of ickiness is kryptonite when it comes to growing those long-term relationships with clients.

So it's up to you, really. Whether you are mother and daughter or husband and wife, there is so much upon which this decision depends. It depends on your comfort levels and relationships with your clients, and more importantly, it depends on your individual comfort levels as well. Trust your gut on this one.

• Mutual respect is a must

This goes without saying and cannot ever falter. Unless each relative truly respects each other's talents and capabilities, then all is for naught. This is especially true of family-staffed organizations that are of the parent/child nature. The parent should always try to bear in mind that your shoes are large ones to fill and you have been forging your path for quite some time. It can be extremely intimidating to join a parent's organization, as well as their field, and know that everyone else knows exactly who you are and who your parent is. Such a reputation can cast a long shadow over a son or daughter, and it's up to the child to create their own pathway out of it.

To this end, each relative must be allowed to act upon their individual instincts, try new things and be given the opportunity to make contributions as well as mistakes. And they must be allowed to do so without constant coddling. Even a mother bird pushes her baby out of the nest eventually.

Now I'm not saying to shove your fledgling out, dust off your hands and not look back - we all need a lifeline and when working with family, you should have the strongest support system of them all. However, there can be no growth if your up-and-comer never steps forth into the sun from under an already well-established and protective wing. Don't worry; you'll both know when it's time to fly.

No bottom line

The bottom line is there is no bottom line. So long as each family member remains flexible enough to ride the tide as it changes - and it will - and as long as each person is completely honest with him/herself as well as with the rest of family and company, you should be able to surf every wave that comes along. As a career field, market research is a vast ocean with limitless opportunities, and with family working alongside one another, you should be in a position not to ask whether you think you will sink or float, but how far you're willing to swim.

So does it make me special or cool to have been given a nickname in the world of market research? Well, I'm no Fonz - that's for sure. But I've discovered that it's no small matter to be The Daughter, either. It's a title that carries much weight, but it's up to me to create and fill the job description.

Remember, choose your battles, choose your priorities and choose your goals…but always choose each other. | Q

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half (45 percent) having been in operation for more than 10 years, according to the results of a MasterCard Worldwide survey. The second annual Women in Small Business survey, conducted by Ipsos on behalf of MasterCard, found 42 percent of women entrepreneurs make more than half of their purchases with a credit or debit card.

Women small-business owners are a driving force in the U.S. economy. According to a study conducted between 1997 and 2006 by the Center for Women's Business Research, the number of majority women-owned firms increased from 5.4 to 7.7 million, an increase of 42 percent, which represents an increase almost double that of all firms (23 percent).

The MasterCard survey explored the needs and challenges facing women small-business owners in trying to establish and run successful businesses, including the reasons why they start their own business and how they pay for business-related expenses.

The use of business credit and debit cards among women small-business owners is almost ubiquitous. Most hold either a credit (52 percent) or a debit card (30 percent), while 19 percent hold both. A full 42 percent of women entrepreneurs use payment cards to make more than half of their purchases.

More than half (53 percent) of women small-business owners say they completely separate personal and business finances while 34 percent say that they do overlap to some degree.

One-third (33 percent) of women small-business owners use a money management software application to handle their finances, an increase from 27 percent reported in 2005. This reflects a shift from 2005 when women business owners looked to accountants as the No. 1 method for financial management.

The primary motivator for women to start their own business is the desire to be their own boss (33 percent). This is followed by the opportunity to generate household income (21 percent), have more schedule flexibility (19 percent) and more time for family and personal interests (17 percent). These top reasons are relatively unchanged from 2005.

Women working full-time are more motivated by a desire to be their own boss (41 percent), while key motivators for women working part-time include a desire for flexibility in their schedule (29 percent) and having more time for family and personal interests (24 percent).

The main challenges women entrepreneurs said they face are stretching themselves across multiple roles and projects (25 percent), health care costs (18 percent), balancing family and work (14 percent) and effectively managing cash flow (7 percent).

The MasterCard Worldwide survey, conducted by Ipsos between August 30-September 5, 2006, polled 300 women small-business owners from around the country and has a margin of error of ±5.7 percent quoted at the 95 percent confidence level. For more information visit www.mastercardworldwide.com.

Study puts Boomers into five distinct groups

A study by Boston research firm Chadwick Martin Bailey (CMB), in conjunction with Arnold Worldwide, shows that treating the Boomer generation as only one or two groups is a mistake that oversimplifies their robust differences. "For years, companies have been marketing their products to the Baby Boomer generation as if it were a homogeneous group," says Mark Doherty, vice president of Chadwick Martin Bailey. "Our research shows that marketers can identify more substantive, actionable and strategic differences by segmenting the generation into five subgroups based on common attitudes, behaviors and demographics."

CMB and Arnold Worldwide have identified the following five distinct Boomer subgroups:

• Status Seekers: The largest segment identified, Status Seekers make up 26 percent of Boomers. The group is characterized as materialistic and feels that money is the best measure of success. They enjoy the finer things in life and are willing to pay more for brand names. Thirty-one percent of Status Seekers drive a vehicle they feel makes a statement about their personality and style.

• Traditionalists: This group accounts for 23 percent of Boomers. Traditionalists are defined by their conservative political, economic and social views. They have traditional attitudes and belief systems, are known for following the rules and are smart consumers (interested in value, trust and variety). Forty-five percent of Traditionalists report that they'll go out of their way to buy American-made products.

• Blue Collar Skeptics: 18 percent of Boomers fall into this group. The Blue Collar Skeptics are just that - skeptics. They are hesitant to trust big businesses and are concerned about the amount of information online. As they fall on the low end of the Boomer income bracket, this group is more stressed about time and money than the rest of their generation: 68 percent of Blue Collar Skeptics fear they haven't saved enough money for retirement.

• Activists: The most politically and socially active segment, 17 percent of Boomers are Activists. They are generally liberal and also donate a significant amount of time and money to charity. Activists are concerned about the environment, are brand-loyal and are financially smart. Thirty-seven percent of Activists describe themselves as green consumers (i.e., buying hybrid cars, recycling, etc).

• Achievers: The minority of Boomers, just 16 percent, fall into the Achiever category. This group adopts technology early and relies on it heavily. They are focused on success and wealth and are heavily involved in social activities. Twenty-four percent of Achievers claim to be the first among their friends to have new gadgets and devices.

In addition to the segments identified above, the CMB study exposed these common misperceptions of the Baby Boomer generation:

• More than 70 percent of Boomers were never actually politically active in the '60s and '70s. For example, only 6 percent claim to have been active participants in historic movements such as civil rights, anti-war and women's rights; and only 15 percent claim to have participated in demonstrations or protests.

• While only one in five Boomers consider themselves a "knowledgeable source of information for new technologies," certain portions of the Boomer population are much more tech-adept than previously believed. Achievers, for example, own significantly more technology devices than their counterparts and they consistently rely on technology.

For the purposes of this study, CMB surveyed 1,000 Baby Boomers born between 1946 and 1964. For more information contact Josh Mendelsohn at jmendelsohn@cmbinfo.com.

Retirement planning: don't do what I did

In a classic case of "Do as I say, not as I do," a nationwide survey of pre-retirees offers younger generations a glimpse of what Baby Boomers might do differently if they could turn back the clock and start their retirement planning over.

According to the survey of 2,500 adults, ages 45-64, conducted for Minneapolis-based Thrivent Financial for Lutherans, 71 percent of respondents wished they had started saving for retirement when they had their first full-time job, and a whopping 86 percent would advise younger generations to start saving as soon as possible. In addition, 61 percent would invest $1 million of unexpected income in retirement savings rather than start a business, buy a luxury home or go on a shopping spree.

The Thrivent Financial survey looked at pre-retirees' visions of retirement. It revealed a startling disparity between pre-retirees' ideal plans and their actual retirement readiness. Although the majority of pre-retirees (67 percent) anticipate that they will either enjoy a lifestyle similar to life now - or even thrive in retirement - they admit to wishing they were better prepared.

According to the survey, most pre-retirees (35 percent) ranked "starting to save and invest too late in life" as the No. 1 obstacle that keeps them from saving more money for retirement. Other top-ranking obstacles included the cost of health care or health insurance (32 percent), a low-paying job (29 percent) and credit card debt (28 percent).

Beyond saving earlier, the advice most offered to younger generations by pre-retirees included:

• Don't procrastinate - retirement will come sooner than you think (57 percent).

• Plan for the unexpected (57 percent).

• Seek professional help - retirement will come sooner than you think (32 percent).

While Boomers offered earnest advice to younger generations on their impending retirement, how they are preparing for their own retirement also made a resounding statement. Despite well over half (56 percent) of pre-retirees expecting to enjoy a standard of living similar to or better than their own parents, 71 percent of respondents feel a shortage of money in retirement may prevent their plans.

While many factors contribute to pre-retirees' guarded optimism about retirement, a lack of proactive planning and saving is the greatest cause for concern. The survey also found that:

• One in four (24 percent) pre-retirees haven't begun saving for retirement and one in five (19 percent) didn't start until they were at least 45 years old.

• Fifty-nine percent have neither gone through a formal retirement planning process with a financial professional nor done serious calculations on their own.

• Forty-one percent of respondents are worried about the effect of health care costs on their retirement savings.

While the advice pre-retirees gave may sound like more of a warning and the example they set a cautionary tale, Boomers are quick to point out that they are looking forward to retirement. For example, like a soundtrack to their lives, they likened their outlook on retirement to memorable song titles. Thirty-five percent say the Beatles' "The Long and Winding Road" most closely resembles their vision of retirement. However, 21 percent of pre-retirees compared retiring to another '70s hit - "Stayin' Alive" - as a testament to the apprehension they feel about getting by.

Additionally, 36 percent say planning for retirement is like a "walk in the park." Most expect to be able to travel (45 percent), spend more time with children and grandchildren (39 percent) or take up a new hobby or activity (23 percent).

Data for this survey were collected by the Harris Interactive Service Bureau (HISB) on behalf of Action Marketing Research. HISB was responsible for collection of the online data and demographic weighting only. Action Marketing Research was responsible for the survey design and was solely responsible for data analysis. HISB collected data September 26 to October 7, 2006, among a nationwide cross section of 2,500 U.S. adults age 45 to 64, of whom 1,213 were men and 1,287 were women.

Teens have friends and e-friends

For today's teens, friendships are developed in areas beyond the school walls or their neighborhoods. E-mail and social networking sites such as MySpace, Sconex and Facebook allow young people to expand their social connections by contacting and becoming friends with people who they have not necessarily met in person.

A study by New York-based Alloy Media + Marketing and Harris Interactive, Rochester, N.Y., shows that new technologies shift the means of communication across this digital generation, as teens come to define their closest circles by those they are connected with both online and offline.

Online social networks are providing fertile ground for teens to practice social behaviors, to try out different personas in their exploration for identity, and to nurture friendships. In some cases, online social networks allow for more intimate connections than offline relationships. The study depicts a generation more at ease through virtual communication, with many reporting they are more likely to reveal their true selves and to share more personal information with friends online than face-to-face.

"The Internet plays an increasingly important role in kids' friendships. Social networking Web sites aid in youth development by providing an arena to build meaningful relationships, establish independence, strengthen their identity and become connected to a community that is not limited to their physical community," says Suzanne Martin, research manager, youth and education research, Harris Interactive.

Friendships play an increasingly important role in young people's lives as they grow up. While more tweens (ages 8 to 12) prefer spending time with their parents than with their friends (58 percent vs. 31 percent), by the teen years (ages 13 to 17), this preference has dramatically reversed. More than twice as many teens say they prefer spending time with their friends than with their parents (56 percent vs. 22 percent).

Youth connect with each other in a variety of ways and favor certain means of connecting over others. Both tweens and teens are most likely to spend time with their friends in school and outside of school, by getting together with friends in person and speaking to them on the telephone. Teens are much greater users of e-mail or instant messaging (IM) (74 percent vs. 26 percent) and text messaging (37 percent vs. 9 percent) than their tween counterparts.

Talking to friends in person is the most-cited favorite way for teens to stay in touch (53 percent); however this preference is strikingly higher among tweens (81 percent). Fewer teens and tweens favor staying in touch with their friends through technologies such as IM (16 percent vs. 2 percent), cell phones (11 percent vs. 3 percent), e-mail (4 percent vs. 1 percent) and text messaging (4 percent vs. <1 percent). Tweens are more likely than teens to favor landline phones as a way to stay in touch with their friends (12 percent vs. 8 percent).

Social circles have widened in the age of digital media, causing a shift in perception of social status among today's youth. The number of friends young people attract to their social network profiles is an indicator of their status among peers. Most teens (59 percent) report having between one and 10 friends while more tweens (69 percent) report having that many friends. However, the number of friends appears to increase when the term "friend" is put in the context of an online profile or IM buddy list. Teens who have these types of lists have an average of 75 people on their online profile, 52 on their IM buddy list, 39 on their e-mail contact list and 38 contacts on their cell phone.

"Today's teens look to their friends above any other influence for guidance and approval. The extensive accessibility to 'friends' in the current media environment and the evolving definition of friend affords peer networks greater import than ever," says Samantha Skey, senior vice president, strategic marketing, Alloy Media + Marketing. "The shift extends to brands endeavoring to reach this influential audience as advertisers look to use the power of youth connectivity - and the evolving definition of friend - to enable online propagation of their messages."

For many teens, meeting in person is not a prerequisite for being considered a friend. Online connections have provided a socially accepted platform for teens to form friendships. More than one-third of teens (36 percent) have friends they've never met in person but have only "talked to" online. This is four times the number of tweens who have such friendships (8 percent). However, most teens use the Internet to augment relationships they have in the real world. Nearly nine in 10 (87 percent) have friends whom they talk to both in person and online; this is more than the number of teens who have friends whom they only talk to in person/on the phone (and never talk to online) (79 percent).

Friendships that are nurtured in both the real and virtual worlds define a teen's closest connections, depicting relationships that are more longstanding and intimate than those that are carried out in only one or the other. Nine in 10 teens (89 percent) who have friends that they talk to both in-person and online have known them for at least one year, and three-quarters (77 percent) consider these friends to be extremely or very close. In contrast, friendships that exist only in the real world are slightly less likely to be of such long standing: 82 percent report that they have known these friends at least a year.

But perhaps of more interest, fewer teens describe "in person-only" friendships as close, compared to those with friends to whom they maintain ties both in person and online. Only half (52 percent) of teens describe these friendships as extremely or very close. Friendships that exist only online are more recent, and thus not surprisingly, less close. Fifty-one percent of teens who have friends to whom they only talk online say they have known these friends for six months or less, and two-thirds (66 percent) describe these friendships as not at all or somewhat close. As these data show, even for teens, friendships that exist only online do not trump those with people they know in the real world as well.

For some teens, communicating online allows them to show more of their true selves. Three in 10 teens say they can share more with a friend online (30 percent) and that they are more honest when they talk to friends online (29 percent). Online friendships play different roles for teens and tweens. A majority of teens (62 percent), compared to only 49 percent of tweens, report that talking to their friends online makes them feel that they are always connected. Online friendships for tweens are as much an emblem of growing up. Half of tweens (52 percent), versus only 34 percent of teens, say that talking to their friends online makes them feel cool.

For young people, a friend is "someone I care about who I can talk to about anything," "someone who cares about me," "someone who is always there for you and you always hang out with," and "someone you can trust." For most teens, e-mail, IM and social networking sites provide another way to nurture friendships with people they know in person as well. But the length of a friendship is also an important factor in its closeness. Since many of teens' online-only friendships are more recent, only time will tell how those will evolve. For more information visit www.harrisinteractive.com.

Product and Service Update

continued from page 12

ArcIMS 9.2, which features new ways to create Web mapping applications, enhanced performance and improved security. ArcIMS 9.2 comes with the new ArcIMS Web Manager, a browser-based application that provides a step-by-step workflow for creating Web applications. With the ArcIMS Web Manager, users can configure services as well as functionality.

ArcIMS 9.2 also comes with a Web application developer framework (ADF). The Web ADF can be used to create customized Web applications from scratch or edit the output from the ArcIMS Web Manager. It supports both the .NET and the Java platform.

The Web ADF and Web Manager both support the integration of multiple GIS services (e.g., ArcGIS Server, ArcIMS, WMS, ArcWeb Services) in one Web application using the new multiservice architecture of ArcIMS.

ArcIMS 9.2 is fully backward-compatible, meaning that all applications created with ArcIMS 9.1 will work in ArcIMS 9.2 without alteration. For more information visit www.esri.com.

Update of Key Survey aims to aid enterprise users

Survey Software Services, Boston, has updated its Key Survey product, improving its functionality for enterprise users in particular. New API calls allow users to send an e-mail reminder to the respondents whose e-mail addresses are in the survey incompletes list and to retrieve a unique survey URL if a valid respondent is specified.

The XML Export feature allows users to export survey response data into XML and XSD formats. XML Export will help users retrieve the information from survey data and view it either as a file on their computer or directly from a browser window. Access Levels Management lets users specifically configure access to individual accounts by granting permissions such as read, edit, delete, launch and publish. This feature is used to control access rights for Key Survey's private label, workgroup and enterprise accounts. For more information visit www.keysurvey.com.

Briefly

Clear Seas Research, Troy, Mich., has launched online panels in four of the industries it serves: plumbing, adhesives, coatings and finishings, safety and flooring. For more information visit www.clearseasresearch.com.

GfK HealthCare Asia is now offering Image Radar as the first service from its recently established syndicated services division. Launched initially in Malaysia, Image Radar enables companies to benchmark themselves against the competition via a range of attributes relating to sales representatives and corporate image. The new service will be progressively launched in other Asian markets. For more information visit www.gfkms.com.

Computers for Marketing Corporation, San Francisco, has unveiled a revised company Web site. The new cfmc.com includes a 40 percent increase in product and service information. The new design is leaner than its predecessor, making for quick download times and faster page rendering. The combination of the new lightweight design and mobile cascading style sheets mean that visitors using smaller screens (a cell phone or PDA) can have easy access to the same information as those on full computer systems. Finally, the site design allows the user to increase or decrease the displayed font size, a preference stated in the Americans with Disabilities Act.

San Francisco-based Telephia and Reston, Va.-based comScore Networks have launched a joint service that compares and combines Internet usage data from the two firms. MobileWeb Metrix is designed to provide media companies, advertisers and agencies with a comparison of audiences who view Internet content using PCs and mobile phones. For more information visit www.comscore.com.

Sydney-based Pulse Group has added an interactive forum feature for the members of its Planet Pulse online research panel. The feature allows for members of its 20 country online communities to interact with each other, share experiences, ideas and insights. For more information visit www.pulse-group.com.

New York research firm Guideline Inc. is now offering its Product Realization Service, which is designed to aid companies in taking products from concept to launch. The service provides assistance from concepting to aspects of product design and manufacturing such as design for performance, materials selection, manufacturing process design and supplier qualification. For more information visit www.intota.com/product-realization.asp.

Harris Interactive Service Bureau, Rochester, N.Y., and Oak Brook, Ill., marketing firm DM2-DecisionMaker have partnered to offer Expert DecisionMaker Panels, industry-specific business-to-business panels built specifically for online market research. Companies that rely on custom market research and seek input from respondents in the business-to-business arena can now access workers in industries such as manufacturing, information technology, construction and small-business. For more information visit www.hisbonline.com.

2006 HealthFocus International Trend Reports are now available from HealthFocus International, St. Petersburg, Fla. The HealthFocus Trend Survey, which looks at consumer attitudes towards nutrition, health and wellness, has been conducted in 30 countries outside of the U.S. since 2000. 2006 reports for the following countries are now available: Argentina, Australia, Brazil, Canada, China, France, Germany, India, Italy, Mexico, Netherlands, Poland, Spain and the U.K. For more information contact Doug Healy at 847-297-7515 or at dhealy@healthfocus.com.

Arbitron Inc., New York, has added four new radio markets for the Spring 2007 survey: Aspen, Colo.; Grand Island-Kearney, Neb.; Hot Springs, Ark,; and Twin Falls (Sun Valley), Idaho. For more information visit www.arbitron.com.

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Media-Screen, a San Francisco research firm that studies the online consumer, will use the market research tools of Seattle-based **Global Market Insite Inc.** (GMI) to gather information for Media-Screen's Netpop syndicated research series. The alliance also brings Netpop reports to GMI's syndicated research Web site, www.insightcafe.com, providing users with access to analysis of the broadband population.

Separately, GMI announced its recruitment partnership with DNSstuff.com, a site for IT workers, through which GMI can recruit IT panelists from DNSstuff.com's computing and IT users for TechSay.com, its online IT panel. DNSstuff.com users have the opportunity to individually opt into GMI's panel, and provide their opinions in exchange for TekPoints as a reward for their time.

Association/organization news

The **Minnesota/Upper Midwest Chapter of the Marketing Research Association** has issued a call for presenters for its new-technology and vendor fair to be held on May 17 in Minneapolis. Topics appropriate for submission are manifold, including but not limited to: data collection methods using cell phones or PDAs; data processing technologies such as automated comment coding; data analysis techniques; and qualitative techniques such as blog scanning.

The audience is expected to consist of a minimum of 50-100 market research professionals. The conference is set up as a series of short presentations, each lasting 10-15 minutes at most. Sales-only presentations will not be accepted.

Prospective presenters must complete an application form. The deadline for presentation submissions is March 9. The deadline for exhibitor submissions is March 16. Submissions should be sent to info@mnmra.org. Contact Randi Luoto at rluoto@gmail.com with other questions about the event. For more information visit www.mnmra.org.

The Qualitative Research Consultants Association has moved its headquarters to 1000 Westgate Dr., Suite 252, St. Paul, Minn., 55114.

Awards/rankings

India-based research process outsourcing firm **Cross-Tab** has achieved the No. 4 position in the Deloitte Technology Fast 50 India 2006, a ranking of the 50 fastest-growing technology companies in India. Cross-Tab has also been ranked by Deloitte in its list of 500 fastest-growing companies in the Asia-Pacific region.

New accounts/projects

Burrell Communications has signed a contract for the use of Arbitron Portable People Meter (PPM) radio ratings service in Houston when **Arbitron** commercializes the PPM.

Oslo-based research software company **FIRM** announced that U.K.-based **Feedback Consumer Consultancy** has licensed FIRM's Confirmit marketing research platform for its online market research business.

New companies/new divisions/ relocations/ expansions

BNP Media, Troy, Mich., has created **Clear Seas Research**, a separate entity providing business-to-business market research.

Judith Langer has formed **Langer Qualitative**, a qualitative research consultancy based in New York. The firm is located at 525 E. 86 St., 18H, New York, N.Y., 10028. Phone 347-684-9073. Fax 917-432-5255. E-mail judy@langerqual.com.

The Miller Research Group Inc. has moved to 311 South Arlington Heights Rd., Suite 40, Arlington Heights, Ill., 60005. Phone 847-342-1500 (Jim Miller); 847-342-1135 (Robert Young). All other contact information is unchanged.

Company earnings reports

Netherlands-based **VNU Group B.V.** announced its financial results for the three months and the nine months ended September 30, 2006. Pro forma operating revenue for the third quarter was EUR 904 million, an increase of 6 percent in constant currency over the prior year. The 2006 amount excludes a EUR 7 million decrease in revenue due to the preliminary purchase price allocation (the "deferred revenue adjustment") related to the sale of the company to a group of private-equity investors in May. Reported operating revenue, including the deferred revenue adjustment and a negative 3 percent impact from foreign-currency translation, was EUR 897 million, up 2 percent.

For the first nine months of 2006, pro forma operating revenue was EUR 2,737 million, up 5.5 percent in constant currency from operating revenue of EUR 2,523 million in 2005. The 2006 amount excludes a negative impact of EUR 58 million from the deferred revenue adjustment. Including this adjustment and the positive impact of foreign currency exchange, operating revenue was EUR 2,679 million, up 6 percent. Reported third-quarter operating income was EUR 72 million, down 29 percent from EUR 99 million last year, while year-to-date operating income was EUR 113 million, compared with operating income of EUR 258 million in 2005. Both the third-quarter and year-to-date results were negatively impacted by a number of acquisition-related items.

Names of Note

continued from page 10

Mich., has named **Lynn Siluk** research director, analytics and **Brent Gruber** senior project director, automotive/powersports.

New York research firm *TNS* has named **Enzo Micali** chief information officer of its North America custom research business. In addition, **Michael O'Keeffe** has been appointed executive vice president, operations and MCP; and **Larry Levin** has been named executive vice president, U.S. consumer goods and services.

Washington, D.C., research firm *Zogby International* has named **Sharon Jachim** executive vice president of its new strategic solutions division.

Lightspeed Research, Basking Ridge, N.J., has named **John Tanzola** vice president, business development for North America and **Greg Stevens** business development representative for North America. In addition, the firm named **Nancy Kienzler** vice president of research operations and **Francesco Colbertaldo** senior vice president of business development.

Research firm *D3 Systems*, Vienna, Va., has named **Karl Feld** research manager and **John Richardson** assistant project manager for its worldwide research portfolio.

Researcher *Synovate Healthcare* has named **Kris Weinberg** vice president of longitudinal oncology services.

Package design firm *Product Ventures Ltd.* has named **Gail Ritacco** vice president market insights at its Fairfield, Conn., headquarters.

Parker Marketing Research, Cincinnati, has named **Kurt Palmquist** vice president, consumer research consultant.

Paul Field has joined the *Sutter Group*, a Lanham, Md., marketing and design agency, as strategic planning director. Marketing research will be among his new responsibilities.

Bret W. Wise, president and chief operating officer of Dentsply International Inc., has been elected to the board of directors of research firm *IMS Health*, Fairfield, Conn.

New York research firm *ROI2* has named **Peter J. Ruckdeschel** business development manager.

At *Greenfield Online*, Wilton, Conn., **Keith Price** has been promoted to executive vice president, North American sales and operations. **David St. Pierre** has been promoted to global technology officer for both the North American and the Ciao Survey Solutions businesses. **John Tan** will head up the company's India operations as vice president of survey programming. **Doug Guion** has been tapped to lead the company's Toronto sales and operations hub.

Stamford, Conn.-based *InsightExpress* has named **Jamie Huffman** senior account manager, technology. **Peter Zsamboky** has been named director, custom panels.

M/A/R/C Research, Irving, Texas, has named **Betsy Sutherland** senior vice president in its Greensboro, N.C., office. **Sherri Neuwirth** has joined M/A/R/C as senior vice president.

New York research firm *Advanced Focus* has named **Alison McAndrew** project director.

Ciao has named **Ross Broadbent** as new product development and product management director for its Ciao Internet survey solutions business. He is based in Ciao's London office.

New York-based *Ziment Custom*, the primary research division of the Ziment Group, has promoted **John Tapper** to chief operating officer of the division. This is in addition to his current title as chief methodologist.

2007

Marketing Research

Software Directory >>>

The 2007 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 360 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 78
The software cross-reference tables begin on page 100

ActiveGroup
3720 da Vinci Court
Norcross, GA 30092
Ph. 770-449-5539
info@activegroup.net
www.activegroup.net
Software:
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ActiveGroups have revolutionized the way marketing researchers view, conduct and manage their qualitative research. You and your colleagues can engage in your research via the Internet from the comfort of your home or office through ActiveGroup's secure ClientLounge interface. With over 240+ facilities worldwide, ActiveGroups have quickly become an industry resource by connecting researchers with their research live and on-demand, and by eliminating the increasing costs and hassles of travel. ActiveGroups allow you to watch your research and your budget, too. For more information or a demonstration, call 800-793-3126 or visit www.ActiveGroup.net.
(See advertisement on p. 41)

Advanced Data Research, Inc.
1765 Star Batt Dr.
Rochester Hills, MI 48309
Ph. 248-299-5300 ext. 210
soare@adrsoft.com
www.adrsoft.com
Software:
Abase

Advanced Data Research (ADR) has been providing researchers worldwide with the technology and processes to take their research paperless since 1990. ADR offers many value-added features such as our Graphic Breakout technology. This is an innovative process that allows each respondent to select specific part(s) of any product for a particular question.
(See advertisement on this page)

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info@surveycharter.com
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Software:
Survey Charter

Alta Plana Corporation
7300 Willow Ave.
Takoma Park, MD 20912
Ph. 301-270-0795
info@altaplana.com
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Software:
SuperCROSS
SuperSTAR
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Alucid Solution
5887 Glenridge Dr., Suite 350
Atlanta, GA 30328
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Software:
UsabilityWare

AmSoft Systems US LLC
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Ph. 650-632-4480
gabe.wachob@amsoft.net
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Gabe Wachob
Software:
PULSE

The Analytical Group, Inc.
16638 N. 90th St.
Scottsdale, AZ 85260
Ph. 480-483-2700
jack.pollack@analyticalgroup.com
www.analyticalgroup.com
Jack Pollack, President
Branch Office:
640 N. LaSalle Dr.
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WinQuery, a Windows-based computer-aided interviewing system featuring easy questionnaire set-up, sample management, quota control, interviewing productivity and disposition reports. WinCross, a Windows-based crosstabulations system. WinCross features include a wide array of statistical testing, unlimited tables and respondents, weighting, netting, sample balancing, factor analysis module and data entry module. QueryWeb, for Web-based interviewing on the Internet.
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Software:
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Software:
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SurveyPro

ARCS® IVR Systems
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Tim Antoniewicz, AVP - ARCS Bus. Dev.
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ARCS® IVR Systems provide a unique set of fully integrated capabilities - simultaneous inbound/outbound IVR options, panel management/scheduling, concurrent Web/IVR survey capabilities and multiple project support. Based on Microsoft Windows, Transaction Services (MTS) and SQL Server, the ARCS system is efficient, flexible and highly scalable. All data stored in SQL databases.
(See advertisement on pp. 67, 91)

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Canada
Ph. 905-889-8783
sales@atpcan.com
www.rosetta-intl.com
Dave Homer, President
Software:
Rosetta Studio
(See advertisement on p. 93)

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Lago Vista, TX 78645-7523
Ph. 512-267-1814 or 512-917-6923
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www.namestormers.com
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Software:
Headliner®
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AutoData Systems
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Minneapolis, MN 55343
Ph. 952-938-4710 or 800-662-2192
sales@autodata.com
www.autodata.com
Software:
ExpertScan
Scannable Office

BayaSoft LLC
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Leominster, MA 01453
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Software:
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Ph. 800-359-7738
sales@surview.com
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Software:
Surview Sales Media Research Edition

Business Forecast Systems
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Software:
The Unscrambler
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Ph. 760-936-4500
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Teleform

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www.cfmc.com
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(See advertisement on opposite page)

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www.claritas.com
Carol Fitsimmons, AVP, Marketing
Software:
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Lou Smith, General Manager
Software:
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Russia
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www.datafriend.net
Elena Khlyupova
Software:
- DataFriend

Common Knowledge Research Services
16200 Dallas Pkwy., Suite 140
Dallas, TX 75248-6897
Ph. 800-710-9147 or 972-732-7323
getinfo@commonknowledge.com
www.commonknowledge.com
Steven R. Levine, President
Software:
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(See advertisement on p. 51)

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Software:
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- Text Analysis Program-TAP

CONVERSOFT (Axiom Software)
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info@conversoft.com
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Software:
- CONVERSO CAPI
- CONVERSO CASI
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Creative Research Systems
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Petaluma, CA 94952
Ph. 707-765-1001
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Bill Eaton, V.P. Sales
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- The Survey System - CATI
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Sally Hooper, Owner
Software:
- Interque

Cybernetic Solutions - The Survey Software
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R. Kent Francis, President
Software:
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- StatMost
- XPro

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STATS™ 2000 is a software package for IBM-compatible PCs. The software: generates random numbers; calculates sample sizes; computes the mean; standard deviation; standard error, range for keyboard-entered data; determines the standard error of proportion; performs significance tests between two percentages from independent samples, or dependent samples; does significance tests between averages from independent samples; performs Chi-square analysis.
(See advertisement on p. 13)

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Software:
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Easy Analytic Software, Inc.
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(See advertisement on opposite page)

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Ph. 781-453-1377
info@smiusa.com
www.smiusa.com
Software:
- 2D VOG
- 3D VOG
- iViewX

Sinclair Customer Metrics, Inc.
900 Isom, #110
San Antonio, TX 78216
Ph. 800-600-3871 or 210-979-6000
info@emailsinclair.com
www.sinclaircustomermetrics.com
Frank Bernacet
Software:
- Customer Connect 360

Smart Software, Inc.
Four Hill Rd., Suite 2
Belmont, MA 02478-4349
Ph. 617-489-2743
info@smartcorp.com
www.smartcorp.com
Software:
- SmartForecasts®

snap® surveys

Snap Survey Software
Div. of Mercator Corporation
Pease International Tradepoint
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Portsmouth, NH 03801
Ph. 603-610-8700 or 800-997-7627
sales@snapsurveys.com
www.snapsurveys.com
Software:
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- SNAP Professional
- SNAP Results
- SNAP Scanning

Snap is powerful, intuitive survey software for questionnaire design, publishing, data collection and analysis. Snap supports all survey modes (Web, e-mail, paper, kiosk, phone, PDA, scanning, Tablet PC). Snap has robust analysis capability (tables, charts, reports, descriptive and multivariate statistics) and is very extensible - MS Access or SQL database connectivity and seamless integration with MS Office (Word, Excel, PowerPoint, Access) and SPSS.
(See advertisement on this page)

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

SPRING SYSTEMS
P.O. Box 211
Elkhorn, WI 53121
Ph. 262-642-5929
springsys@worldnet.att.net
www.geocities.com/wallstreet/3960/
John Pavasars, President
Software:
- ARGUS Perceptual Mapper
- MktSIM
- Trial Map
- Turbo Spring-Stat

SPSS Inc.
233 S. Wacker Dr., 10th Floor
Chicago, IL 60606
Ph. 800-543-2185
sales@spss.com
www.spss.com
Joseph
Software:
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Clementine
Entryware
MR Interview
mr Studio
mr Tables
Quancept CATI
Quanquest
Quantum
Quanvert
SPSS Text Analysis for Surveys

SQAD Inc.
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Tarrytown, NY 10591
Ph. 914-703-6807
lfried@sqad.com
www.snapsoftware.com
Larry Fried, V.P. Nat'l. Sales
Software:
DATAVue
NetCosts
Snap Express
Snap3

Statistical Innovations, Inc.
375 Concord Ave.
Belmont, MA 02478
Ph. 617-489-4490
robert@statisticalinnovations.com
www.statisticalinnovations.com
Software:
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StatPac, Inc.
8609 Lyndale Ave. S., #209A
Bloomington, MN 55420
Ph. 715-442-2261
info@statpac.com
www.statpac.com
David Walonick, President
Software:
Statistics Calculator
StatPac Survey Software

StatSoft, Inc.
2300 E. 14th St.
Tulsa, OK 74104
Ph. 918-749-1119
info@statsoft.com
www.statsoft.com
Josh Coffey
Software:
STATISTICA 6
STATISTICA 7

William Steinberg Consultants, Inc.
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Champlain, NY 12919
Ph. 888-725-9392
info@notjustsurveys.com
www.notjustsurveys.com
William Steinberg, Ph.D., President
Software:
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Survey Genie - Gold
Survey Tools For Windows

SumQuest Survey Software
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Toronto, ON M4P 3H8
Canada
Ph. 800-779-7528
rmacnaughton@sumquest.com
www.sumquest.com
Ross Macnaughton, President
Software:
SumQuest Survey Software

SSI
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INTERNATIONAL

Survey Sampling International
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(See advertisement on p. 11)

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Canada
Ph. 604-609-7736 or 800-833-7846
quirks@clipstream.com
www.clipstream.com/surveys/
John Gammack, Vice President
Software:
SurveyClip

SurveyConnect, Inc.
2960 Diagonal Highway, Suite 202
Boulder, CO 80301
Ph. 303-449-2969
info@surveyconnect.com
www.surveyconnect.com
Marcie Levine, President
Software:
ActiveView 360
Survey Select Expert
SurveyConnect Online Testing

SurveyWriter®
3717 N. Ravenswood Ave., #236
Chicago, IL 60625
Ph. 773-281-8490
info@surveywriter.com
www.surveywriter.com
Software:
SurveyWriter

SySurvey
13 Brenchley Gardens
London SE23 3RD
United Kingdom
Ph. 44-870-086-1773
info@sysurvey.com
www.sysurvey.com
Ethan Roberts, Sr. Analyst
Software:
Sysurvey.com

Techneos Systems Inc.
Suite 209, 788 Beatty St.
Vancouver, BC V6B 2M1
Canada
Ph. 604-435-6007 or 888-282-0641
info@techneos.com
www.techneos.com
Software:
Entryware 6.0

TelAthena Systems LLC
96 Morton St., Ground Floor
New York, NY 10014
Ph. 888-777-7565 or 212-463-8054
sales@telathena.com
www.telathena.com
Software:
TelAthena

Tele Atlas
11 Lafayette St.
Lebanon, NH 03766
Ph. 800-331-7881
sales@gdt1.com
www.geographic.com
Software:
DynaMap/Census

TeleSage, Inc.
P.O. Box 750
153 E. Franklin St.
Chapel Hill, NC 27514
Ph. 866-942-8849 or 919-942-8849
info@telesage.com
www.telesage.com
Howard Surette
Software:
DialQ
eQ
SendQ
SmartQ

Tetrad Computer Applications, Inc.
3873 Airport Way
P.O. Box 9754
Bellingham, WA 98227-9754
Ph. 800-663-1334 or 360-734-3318
info@tetrad.com
www.tetrad.com
Wilson Baker, President
Software:
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MapPoint
PCensus
Vertical Mapper

Touchview Survey Solutions
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Los Altos, CA 94024
Ph. 650-968-0405
info@touchviewsurvey.com
www.touchviewsurvey.com
Software:
Touchview Survey Solution

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

20/20 Research - Online
2303 21st Ave. S.
Nashville, TN 37212
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rachaelk@2020research.com
www.2020research.com
Rachael Krupek
Software:
Qualboard

The Uncle Group, Inc.
3490 U.S. Rte. 1
Princeton, NJ 08540
Ph. 800-229-6287
info@unclegroup.com
www.unclegroup.com
Thomas Reeder, Vice President
Software:
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Uncle Reports
UNCLE Standard
USORT

Viking Software Solutions
A Div. of Phoenix Software International
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Ph. 800-324-0595 or 918-491-6144
sales@vikingsoft.com
www.vikingsoft.com
Software:
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VDE
VDE+Images

Vision Critical
858 Beatty St., 7th floor
Vancouver, BC V6B 1C1
Canada
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vancouver@visioncritical.com
www.visioncritical.com
Jason Smith, Sr. V.P. Sales & Marketing
Software:
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Panel+

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(See advertisement on pp. 59, 61)

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Montreal, PQ H3B 1H4
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Ph. 514-861-9255
montreal@voxco.com
www.voxco.com
Software:
CAPI Manager
Interviewer
Interviewer CAPI
Interviewer CATI
Interviewer VCC (Virtual Call Ctr.)
Interviewer Web
Pronto Telephony Solutions
STAT XP
Voxco Command Center
VOXCO Tab

Voxco is an international publisher of integrated survey software for multi-mode data collection and reporting analysis for feedback management (EFM). Voxco's main products are: Interviewer Virtual Call Center™ (Web-CATI, plus CAWI in mixed mode); VoxcoTab™ (statistical tabulation package); Voxco Command Center™ (centralized control system for mixed-mode and multi-mode surveying and data collection including CATI, CAPI, CAWI); and PRONTO™ (telephony server and predictive dialer). Headquartered in Montreal, we have branches in the U.S., France, U.K. and Germany.
(See Web ad at www.quirks.com)

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Ph. 800-334-3939 or 317-843-3939
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Michael Desanto, V.P. Marketing Comm.
Software:
Walker Smart Loyalty® System

WebSurveyor Corporation
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Herndon, VA 20170
Ph. 800-787-8755 or 703-481-9326
sales@websurveyor.com
www.websurveyor.com/quirks
Software:
CRMSurveyor
WebSurveyor

Weeks Computing Services
6 Langley Street, Covent Garden
London WC2H 9JA
United Kingdom
Ph. 44-20-7379-3548
info@weekscomputing.com
www.weekscomputing.com
Tony Weeks, Partner
Software:
U-Tab

Jan Werner Data Processing
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Pittsfield, MA 01201
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jwerner@jwdp.com
www.jwdp.com
Jan Werner, Principal
Software:
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QGEN
QTAB

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Rockville, MD 20850
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www.westat.com
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Blaise
WesVar

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sales@wrcresearch.com
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(See advertisement on p. 97)

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www.xionetic.com
Software:
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Xorbix Technologies, Inc.
759 N. Milwaukee St., Suite 322
Milwaukee, WI 53202
Ph. 414-277-5044
info@xorbix.com
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Software:
Ioxphere

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Denver, CO 80203
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info@yourperceptions.com
www.yourperceptions.com
Jim Zigarelli, President
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Your2Cents Online Opinion Panel
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(See advertisement on p. 51)

Zoomerang
Market Tools Inc.
150 Spear St., Suite 600
San Francisco, CA 94105
Ph. 800-316-0662 or 415-957-2000
sales@zoomerang.com
http://info.zoomerang.com
Software:
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(See advertisement on opposite 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. 95	●				●	GUI			●	●	●	●		●				
Answer Tree SPSS Inc. p. 96	●				●	Both	Var			●	●						Buy	$$
ARGUS Perceptual Mapper SPRING SYSTEMS p. 95	●										●							
askiaanalyse ASKIA - Software for Surveys p. 80	●					GUI	Unltd	Unltd	●	●	●		●		●			
askiavista ASKIA - Software for Surveys p. 80						Both	Unltd	Unltd	●	●	●		●		●		Either	
CART Salford Systems p. 94	●		●	●		Both	8,192		●	●	●						Buy	$$
CBC System Sawtooth Software, Inc. p. 95	●				●	GUI			●	●	●	●	●		●			
CCA System Sawtooth Software, Inc. p. 95	●					GUI	300		●	●	●			●				
Clementine SPSS Inc. p. 96	●		●		●	Both	Unltd		●	●			●	●	●	●	Buy	$$$$
Community Coder ESRI p. 84							Unltd											
Confirmit FIRM INC. p. 84	●				●	GUI			●	●	●	●						
CPM System Sawtooth Software, Inc. p. 95						GUI			●	●	●			●				
Customer Connect 360 Sinclair Customer Metrics, Inc. p. 95					●	GUI			●	●	●	●	●					
CVA System Sawtooth Software, Inc. p. 95	●					GUI			●	●	●	●			●			
Databeacon Databeacon Inc. p. 82					●	GUI												
DataFriend COMCON p. 82	●					GUI	Unltd	Unltd	●	●	●		●	●		●	Lease	$$
Dub InterViewer NEBU b.v. p. 90	●			●	●	GUI	Unltd	Unltd	●	●	●	●	●				Lease	
Eform Beach Tech Corporation p. 80	●				●	Both	Unltd	Unltd	●	●	●	●		●	●	●	Either	
eListen Scantron p. 95	●				●	GUI	Unltd	Unltd	●	●	●							
EQS Structural Equations Modeling Multivariate Software, Inc. p. 90	●		●	●		GUI			●	●	●		●	●	●	●	Either	$$
ESPRI Information Tools Ltd. p. 86	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Buy	$$
E-Tabs Interactive E-Tabs p. 84	●	●			●	GUI			●	●	●	●				●	Lease	$$
E-Tabs Lite Reader E-Tabs p. 84	●					GUI												
E-Tabs Web E-Tabs p. 84	●		●			Both						●					Lease	$$$$

$ = $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
E-Tabs Writer E-Tabs p. 84	●		●	●		GUI											Lease	$$$
EzMedia Plan New Age Media Systems, Inc. p. 90					●	GUI	Unltd	Unltd	●	●	●	●					Lease	$$$$
FASTAB Ad Hoc Tabulation DATAN, Inc. p. 82	●					Syntax	5,000	Unltd	●	●	●						Lease	$
Flo - Stat Senecio Software, Inc. p. 95		●							●	●	●	●	●	●	●	●		
Forecast Pro Business Forecast Systems p. 80	●					GUI	10	1	●		●						Buy	$
Forecast Pro Unlimited Business Forecast Systems p. 80	●					Both	Unltd	Unltd	●	●	●		●		●		Buy	$$$$
Forecast Pro XE Business Forecast Systems p. 80	●					GUI	100	1	●	●	●		●		●		Buy	$$$
GeoSight Sammamish Data Systems, Inc. p. 94	●					GUI	Unltd	Unltd	●	●	●						Buy	$
Goldminer® Statistical Innovations, Inc. p. 96	●					GUI				●	●		●	●		●	Buy	$$
HARMONI Information Tools Ltd. p. 86	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Buy	$$$
Hosted Survey Hostedware p. 86					●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	
IdeaMap®.Net Moskowitz Jacobs Inc. p. 90					●	GUI					●	●						
ImagEntry Viking Software Solutions p. 97	●		●	●		GUI	32,000	32,000									Buy	$$
Impact! Analysis Pattern Discovery, Inc. p. 92																	Lease	
Internet Survey Machine Marketing Masters p. 88	●	●	●	●	●	GUI	32,000	Unltd									Buy	$$$$
Interview & Analysis Program Comstat Research Corporation p. 82																		
Ioxphere Xorbix Technologies, Inc. p. 98	●	●			●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$
KMRQuest KMR Software p. 88	●												●				Lease	
Latent Gold® Statistical Innovations, Inc. p. 96	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Buy	$$
Latent Gold® Choice Statistical Innovations, Inc. p. 96	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Lease	$$$
MarketSight® MarketSight LLC p. 88	●				●	GUI	10,000	Unltd	●	●	●	●	●	●	●	●	Either	$$
MARS Salford Systems p. 94	●		●	●			8,192		●	●	●						Buy	$$$$
MaxDiff/Web Sawtooth Software, Inc. p. 95	●				●	GUI				●		●			●			$$$
MENTOR CfMC Research Software p. 82	●		●	●		Syntax	Unltd	Unltd	●	●	●	●	●		●	●	Lease	

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

Tabulation Software Software Title/ Company/Listing page #	Operating System Win	Mac	Unix	Linux	Web	Tabulation Features Graphic user Interface or script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Significance Tests Chi-Square	F-Test	T-Test	Z-Test	Purchasing Buy or Lease	Price Range
MERLIN Tabulation System DATAN, Inc. p. 82	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$$
MERLINPlus (plus menus) DATAN, Inc. p. 82	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$
Microtab Version 6 - Professional Ed. Microtab, Inc. p. 90	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$$
Microtab Version 6 - Standard Edition Microtab, Inc. p. 90	●					GUI	Unltd	Unltd	●			●					Buy	$$
Microtab Ver. 6 SPSS Add-on Module Microtab, Inc. p. 90	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$
MktSIM SPRING SYSTEMS p. 95	●										●							
MM4XL 7.0 MarketingStat p. 88	●					GUI	200	Unltd	●	●	●	●	●	●	●	●	Buy	$$
Modern360 Feedback Modern Survey, Inc. p. 90																		
mr Studio SPSS Inc. p. 96	●					Both			●	●		●					Either	$$
mr Tables SPSS Inc. p. 96	●				●	Both				●		●	●		●		Buy	$$$$
MRDCL Marketing & Rsch. Data Consultants p. 88	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$$$
mTAB Research Analysis System PAI-Productive Access, Inc. p. 92	●				●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	
NCSS Dataxiom Software, Inc. p. 82	●					GUI	250	Var	●	●	●		●	●	●	●	Buy	$
NCSS NCSS p. 90	●					GUI	1,000	Unltd	●		●		●	●	●	●	Buy	$
NET-MR Tabulation GMI (Global Market Insite, Inc.) p. 86	●		●	●	●	GUI	Unltd	Unltd	●	●	●		●	●	●			
NIPO DIANA NIPO Software p. 90	●				●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Lease	$$$
OnTraq Marketing & Rsch. Data Consultants p. 88	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$
PASS Dataxiom Software, Inc. p. 82	●					GUI											Buy	
PEER Forecaster Delphus, Inc. p. 83	●					GUI			●					●	●		Either	$
PEER Planner for Windows Delphus, Inc. p. 83	●					GUI			●	●	●	●	●	●	●	●	Either	$$$$
Postal Carrier Route Polygons Sammamish Data Systems, Inc. p. 94	●						Unltd	Unltd	●	●	●						Buy	$
Power & Precision Dataxiom Software, Inc. p. 82	●					GUI											Buy	$$
P-STAT P-STAT, Inc. p. 92	●		●	●		Both	250,000	Unltd	●	●	●	●	●	●	●		Buy	$$
Pulsar/Pulsar Web Pulse Train Ltd. p. 92	●					GUI	Unltd	Unltd	●	●	●	●	●		●	●	Either	$$$

$ = $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
QDA Data Analysis Software Tragon p. 97	●					GUI	100				●			●			Buy	$$$$
QPSMR CATI QPSMR Limited p. 92	●					Both	30,000	30,000	●	●		●	●	●	●	●	Lease	$$$$
QPSMR INSIGHT QPSMR Limited p. 92	●					Both	30,000	30,000	●	●		●	●	●	●	●	Lease	$$
QPSMR REFLECT QPSMR Limited p. 92	●					Both	30,000	30,000	●	●		●	●	●	●	●		
QPSMR SOLO QPSMR Limited p. 92	●					Both	30,000	30,000	●	●		●	●	●	●		Buy	$$
QTAB Jan Werner Data Processing p. 98	●			●		Syntax	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$$
Quantum SPSS Inc. p. 96							Unltd	Unltd	●	●			●		●	●	Buy	$$$$
Quanvert SPSS Inc. p. 96	●					GUI		Var	●	●					●		Buy	$$
QuestionPro QuestionPro.com p. 92					●	GUI	Unltd	Unltd	●			●	●		●		Either	$$
QWRITERII for Windows Your Perceptions p. 98	●					GUI	2,000	200			●						Lease	$
RandomForests Salford Systems p. 94	●		●			Both	8,192		●	●	●						Buy	
Raosoft EZReport Raosoft, Inc. p. 94	●					Both	Unltd	Unltd	●	●	●		●	●	●	●	Buy	$
Raosoft SurveyWin Raosoft, Inc. p. 94	●					GUI	Unltd	Unltd	●	●			●	●	●	●	Buy	$
Rosetta Studio Rosetta Studio International p. 94	●					GUI		Unltd			●						Either	$$$$
Sensus Web Sawtooth Technologies, Inc. p. 95	●					Both	Unltd	Unltd	●			●					Buy	
Si-CHAID® Statistical Innovations, Inc. p. 96	●					GUI	Unltd	Unltd		●	●		●				Buy	$$
SmartForecasts® Smart Software, Inc. p. 95	●					GUI	Unltd		●	●	●	●	●	●	●	●	Either	$$$$
SNAP Internet Snap Survey Software p. 95	●					GUI	Unltd	Unltd	●	●		●	●		●	●	Buy	
SNAP Professional Snap Survey Software p. 95	●					GUI	Unltd	Unltd	●	●	●	●	●		●	●	Buy	
SNAP Results Snap Survey Software p. 95	●					Both	Unltd	Unltd	●	●	●	●	●		●	●		
SNAP Scanning Snap Survey Software p. 95	●					GUI	Unltd	Unltd	●	●		●	●		●	●	Buy	
SOLAS Dataxiom Software, Inc. p. 82	●					GUI												
SPSS Text Analysis for Surveys SPSS Inc. p. 96	●					GUI											Buy	$$
SSI Web Sawtooth Software, Inc. p. 95	●				●	Both			●	●		●		●	●			

$ = $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
Star Pulse Train Ltd. p. 92	●					Both	Unltd	Unltd	●	●					●	●	Either	$$
STAT XP VOXCO (Groupe Voxco Inc.) p. 98	●					Both	10,000	Unltd	●	●	●	●	●		●	●	Buy	$$$$
STATISTICA 6 StatSoft, Inc. p. 96	●				●	Both	Var	Var	●	●	●		●	●	●	●	Buy	
STATISTICA 7 StatSoft, Inc. p. 96	●					Both	Var	Var	●	●	●		●	●	●	●	Buy	
StatMost Dataxiom Software, Inc. p. 82	●					GUI	250	Var	●		●		●	●	●	●	Buy	$
StatPac Survey Software StatPac, Inc. p. 96	●					Syntax	2,000	Unltd	●	●	●	●	●	●	●	●	Buy	$$
STATS Decision Analyst, Inc. p. 83	●					GUI				●			●					
StyleMap®.Net Moskowitz Jacobs Inc. p. 90					●	GUI					●	●						
SumQuest Survey Software SumQuest Survey Software p. 96	●					GUI	250	Unltd	●	●	●	●	●				Buy	$
SuperCROSS Alta Plana Corporation p. 78	●					GUI	Unltd	Unltd	●	●	●	●	●					
SuperSTAR Alta Plana Corporation p. 78	●		●	●		Both	Unltd	Unltd	●	●	●	●					Either	
Survey Explorer Memphis International p. 88	●					GUI	Unltd	Unltd	●	●			●					
Survey Said Enterprise Edition Marketing Masters p. 88	●				●	GUI											Buy	
Survey Select Expert SurveyConnect, Inc. p. 96	●					GUI	Unltd	Unltd			●	●					Buy	$$
SurveyPro Apian Software p. 80	●					GUI	3,000	3,000	●	●	●	●	●				Buy	$$
SurveySolutions Perseus Development Corporation p. 92	●					GUI	Unltd	Unltd	●		●							
Sysurvey.com SySurvey p. 96					●	GUI			●		●	●					Lease	
TestKit Hexworx Computer Services P/L p. 86	●		●	●	●	Both	Unltd	Unltd	●	●	●	●			●	●	Buy	$
The Survey Cybernetic Solutions p. 82	●					GUI	1,000	32,000	●	●	●		●	●	●	●		
The Survey System Creative Research Systems p. 82	●					GUI	32,000	5,000	●	●		●	●	●	●	●		$$
The Survey System - Web Creative Research Systems p. 82	●					GUI	32000	1000	●	●		●	●	●	●	●		$$
The Unscrambler CAMO Smart Software Inc. p. 80	●					GUI	Unltd	Unltd	●	●	●			●	●	●		
The Unscrambler Designer CAMO Smart Software Inc. p. 80	●					GUI	Unltd	Unltd	●	●	●			●	●	●		
TPL Tables QQQ Software, Inc. p. 92	●		●	●		Both	Unltd	Unltd	●	●		●					Buy	$$

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

Tabulation Software

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
TreeNet Salford Systems p. 94	●		●	●		Both	8,192		●	●	●						Buy	$$$$
Trial Map SPRING SYSTEMS p. 95	●										●							
Turbo Spring-Stat SPRING SYSTEMS p. 95	●										●		●	●	●	●		
UNCLE Professional The Uncle Group, Inc. p. 97	●					Both	65,534	9999	●	●	●		●		●		Buy	$$$$
Uncle Reports The Uncle Group, Inc. p. 97	●					GUI	9,999		●	●								$
UNCLE Standard The Uncle Group, Inc. p. 97	●					Both	65,534	9,999	●	●	●		●		●		Buy	$$$$
U-Tab Weeks Computing Services p. 98	●					GUI	Unltd	Unltd	●	●	●	●	●	●	●		Buy	$
VDE Viking Software Solutions p. 97	●		●	●		GUI	32,000	32,000									Either	$$
VDE+Images Viking Software Solutions p. 97	●		●	●		GUI	32,000	32,000									Buy	$$
Vector Cobalt Sky Limited p. 82					●	GUI	Unltd	Unltd	●	●	●	●				●	Lease	$$$$
VOXCO Tab VOXCO (Groupe Voxco Inc.) p. 98	●					GUI	Unltd	Untld	●	●		●	●		●		Either	
Walker Smart Loyalty® System Walker Information p. 98	●		●		●	Both			●	●	●	●			●		Lease	$$$$
WesVar Westat p. 98	●					GUI	Unltd	Unltd	●	●	●		●	●	●	●		
WinCati Sawtooth Technologies, Inc. p. 95	●					Both	Unltd	Unltd	●			●					Buy	
WinCATI Mixed Mode Sawtooth Technologies, Inc. p. 95	●					Both	Unltd	Unltd	●			●					Buy	
WinCross The Analytical Group, Inc. p. 78	●					Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$$
XPro Dataxiom Software, Inc. p. 82	●					GUI	250	Var	●	●	●		●	●	●	●	Buy	$
Your2Cents® Survey Creator Common Knowledge Rsch. Services p. 82					●	Both			●		●				●	●		
Your2Cents® Survey Creator Your2Cents Online Opinion Panel p. 98					●	Both			●		●				●	●		
Zip + 2 Polygons Sammamish Data Systems, Inc. p. 94	●						Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$
Zip + 4 Centroids Sammamish Data Systems, Inc. p. 94	●						Unltd	Unltd	●	●	●						Buy	
Zip Code Polygons Sammamish Data Systems, Inc. p. 94	●						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. 95	●				●	GUI	●	●	●	●	●			●	●	●	●		
AccessPoint for Market Research Global Bay Mobile Technologies p. 86	●	●	●	●	●	Both	●			●					●			Either	
AskAnywhere Senecio Software, Inc. p. 95	●	●	●	●	●	GUI	●	●		●	●				●			Lease	$$
Askia ASKIA - Software for Surveys p. 80	●					Both	●	●	●	●		●		●	●	●	●	Either	
Bellview Fusion Pulse Train Ltd. p. 92	●					Both			●	●				●		●		Either	$
Blaise Westat p. 98	●					GUI	●	●	●	●								Buy	
CBC System Sawtooth Software, Inc. p. 95	●				●	GUI	●	●	●	●	●	●		●	●	●	●		
Checkbox Mobile Survey Prezza Technologies, Inc. p. 92	●					GUI				●				●					
Ci3 System Sawtooth Software, Inc. p. 95	●				●	Syntax	●	●						●	●				
Confirmit FIRM INC. p. 84	●				●	GUI	●	●	●	●		●		●	●	●	●		
Customer Connect 360 Sinclair Customer Metrics, Inc. p. 95					●	GUI				●	●	●	●	●	●	●	●		
Cutom Panel Building Itracks p. 86					●	GUI			●	●				●	●	●	●		
CVA System Sawtooth Software, Inc. p. 95	●					GUI	●	●	●			●		●	●	●	●		
Dub InterViewer NEBU b.v. p. 90	●			●	●	GUI	●	●	●	●					●	●		Lease	
Eform Beach Tech Corporation p. 80	●				●	Both			●	●	●		●	●	●	●	●	Either	
Hosted Survey Hostedware p. 86					●	Both	●			●	●	●		●	●	●	●	Either	
Interviewer VOXCO (Groupe Voxco Inc.) p. 98	●				●	Both	●	●	●	●				●	●	●		Either	$$
IT CATI/CAPI/Web Interview Technology p. 86	●				●	Both	●		●	●					●			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
Itracks Online CATI Itracks p. 86					●	Both			●	●				●	●	●	●		
Itracks Online Surveys Itracks p. 86					●	Both				●				●	●	●	●		
MaxDiff/Web Sawtooth Software, Inc. p. 95	●				●	GUI	●	●	●	●	●	●							$$$
MR Interview SPSS Inc. p. 96	●				●	Both	●	●	●	●				●	●	●	●	Either	$$$$
NET-MR Suite GMI (Global Market Insite, Inc.) p. 86	●		●	●	●	GUI	●		●	●		●		●	●	●	●		
NIPO Fieldwork System NIPO Software p. 90	●					Both	●	●	●	●	●	●		●	●	●	●	Lease	$$
Online Focus Groups Itracks p. 86					●	GUI				●				●	●	●	●		
OPST (Online Panel Site Tool) Globalpark GmbH p. 86					●	Both				●	●	●	●		●	●	●	Lease	$$$
Pulse DNA Software Suite Pulse Group p. 92	●			●	●	Both	●	●	●	●	●	●	●	●	●	●	●	Either	
QPSMR CATI QPSMR Limited p. 92	●					Both	●	●	●		●	●		●	●	●		Lease	$$$$
QPSMR INSIGHT QPSMR Limited p. 92	●					Both	●				●	●		●	●	●		Lease	$$
Qualmetrix Itracks p. 86					●	GUI				●					●		●		
Quanquest SPSS Inc. p. 96	●					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. 94	●				●	Both	●	●	●	●								Buy	
SNAP Professional Snap Survey Software p. 95	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	
SSI Web Sawtooth Software, Inc. p. 95	●				●	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
StatPac Survey Software StatPac, Inc. p. 96	●					Syntax			●	●	●	●		●	●	●	●	Buy	$$
SumQuest Survey Software SumQuest Survey Software p. 96	●					GUI			●	●	●	●		●	●	●	●	Buy	$
Survey Genie William Steinberg Consultants, Inc. p. 96	●					GUI				●	●	●		●	●	●	●	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc. p. 96	●					GUI		●		●	●	●		●	●	●	●	Buy	$
Survey Said Enterprise Edition Marketing Masters p. 88	●				●	GUI			●	●	●	●	●	●				Buy	
Survey Tools For Windows William Steinberg Consultants, Inc. p. 96	●					GUI		●		●	●	●		●	●	●	●	Buy	$
SurveyPro Apian Software p. 80	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$$
SurveySolutions Perseus Development Corporation p. 92	●					GUI				●	●	●		●	●	●	●		
Sysurvey.com SySurvey p. 96					●	GUI			●	●	●				●	●	●	Lease	
The Survey Cybernetic Solutions p. 82	●					GUI				●	●	●		●	●	●	●		
The Survey System Creative Research Systems p. 82	●					GUI	●	●	●	●	●	●	●	●	●	●	●		$$
Virtual Call Center Network Itracks p. 86					●	GUI			●	●					●	●	●		
Voxco Command Center VOXCO (Groupe Voxco Inc.) p. 98					●	GUI	●	●	●	●		●	●	●	●	●		Either	
WinCATI Mixed Mode Sawtooth Technologies, Inc. p. 95	●					Both			●	●		●	●	●	●	●	●	Buy	

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. 92	●		Both	●	●	●	●	●	Add-on	Either	$$$$
Confirmit FIRM INC. p. 84	●	●	GUI						Yes		
Customer Connect 360 Sinclair Customer Metrics, Inc. p. 95		●	GUI		●				Yes		
Eform Beach Tech Corporation p. 80	●	●	Both		●	●			Yes	Either	
ExpertScan AutoData Systems p. 80	●		GUI		●	●	●	●	Yes	Buy	$$$
FAQSS Optimum Solutions Corp. p. 92	●		GUI	●	●	●	●	●	Yes	Lease	$$$$
FLIPS Scantron p. 95	●			●	●	●					
Inquisite Survey System Inquisite Inc. p. 86	●	●	GUI		●				Yes	Either	$$$$
OPST (Online Panel Site Tool) Globalpark GmbH p. 86		●	Both	●						Lease	$$$
Pulse DNA Software Suite Pulse Group p. 92	●	●	Both	●			●			Either	
Raosoft SurveyWin Raosoft, Inc. p. 94	●		GUI	●	●				Yes	Buy	$
ReadSoft Documents for Forms ReadSoft, Inc. p. 94	●		GUI	●	●	●	●	●	Add-on	Buy	$$$$
Remark Classic OMR Gravic, Inc. - Remark Products Group p. 86	●		GUI		●	●	●		Yes	Buy	$
Remark Office OMR Gravic, Inc. - Remark Products Group p. 86	●		GUI		●	●			Yes	Buy	$$
Scannable Office AutoData Systems p. 80	●		GUI	●	●	●	●	●	No	Buy	$$$$
SNAP Professional Snap Survey Software p. 95	●		GUI	●	●		●	●	Yes	Buy	
SNAP Scanning Snap Survey Software p. 95	●		GUI	●	●		●	●	Yes	Buy	
SumQuest Survey Software SumQuest Survey Software p. 96	●		GUI						Yes	Buy	$
Survey Genie William Steinberg Consultants, Inc. p. 96	●		GUI						Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc. p. 96	●		GUI						Yes	Buy	$
Survey Said Enterprise Edition Marketing Masters p. 88	●	●	GUI	●	●				Yes	Buy	
Survey Select Expert SurveyConnect, Inc. p. 96	●		GUI						Yes	Buy	$$
Survey Tools For Windows William Steinberg Consultants, Inc. p. 96	●		GUI						Yes	Buy	$
SurveyPro Apian Software p. 80	●		GUI		●	●			Yes	Buy	$$
SurveySolutions Perseus Development Corporation p. 2	●		GUI						Yes		
TELEform Scantron p. 95	●			●			●	●			
The Survey System Creative Research Systems p. 82	●		GUI		●				Yes		$$

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. 78	●					●	●	●		Both	●	●	●	Yes	Buy	$$$$
ACA System Sawtooth Software, Inc. p. 95	●				●	●	●			GUI	●	●	●	Yes		
AccessPoint for Market Research Global Bay Mobile Technologies p. 86	●	●	●	●	●	●	●			Both	●	●	●	Yes	Either	
AskAnywhere Senecio Software, Inc. p. 95	●	●	●	●	●	●	●	●		GUI	●	●	●	Yes	Lease	$$
askiaface ASKIA - Software for Surveys p. 80	●					●				Both	●	●	●		Either	
Bellview CAPI Pulse Train Ltd. p. 92	●					●				Both	●	●	●	Add-on	Either	$
CAPI Manager VOXCO (Groupe Voxco Inc.) p. 98	●					●	●	●		Both	●	●	●	Yes	Either	$$
CBC System Sawtooth Software, Inc. p. 95	●				●	●	●			GUI	●	●	●	Yes		
Checkbox Mobile Survey Prezza Technologies, Inc. p. 92	●						●			GUI						
Ci3 System Sawtooth Software, Inc. p. 95	●				●	●	●			Syntax	●	●	●	Yes		
CONVERSO CAPI CONVERSOFT (Axiom Software) p. 82	●					●	●	●		Both	●	●	●	Yes	Either	
CONVERSO CASI CONVERSOFT (Axiom Software) p. 82	●					●	●	●		Both	●	●	●		Either	
CONVERSO Pocket/Mobile CONVERSOFT (Axiom Software) p. 82	●						●	●		Both	●	●		Yes	Either	
CVA System Sawtooth Software, Inc. p. 95	●					●	●			GUI	●	●	●	Yes		
Digivey Survey Suite Diatouch, Inc. p. 83	●					●	●	●		GUI	●	●	●	Yes	Either	$$
Dub InterViewer NEBU b.v. p. 90	●			●	●	●	●	●		GUI	●	●	●	Add-on	Lease	
Eform Beach Tech Corporation p. 80	●				●	●			●	Both	●	●		Yes	Either	
Empathica Customer Experience Mgmt. Sys. Empathica Inc. p. 84					●				●					Yes	Buy	$$$$
Entryware SPSS Inc. p. 96	●						●			GUI				Yes	Buy	$$
Entryware 6.0 Techneos Systems Inc. p. 96	●				●		●			Both				Yes	Lease	$$
Hosted Survey Hostedware p. 86					●		●	●		Both	●	●	●	Add-on	Either	
Interview & Analysis Program Comstat Research Corporation p. 82																
Interviewer CAPI VOXCO (Groupe Voxco Inc.) p. 98	●				●	●	●	●	●	Both	●	●	●	Yes	Either	$$
IT CATI/CAPI/Web Interview Technology p. 86	●				●					Both				Yes	Buy	$$$$
MaxDiff/Web Sawtooth Software, Inc. p. 95	●				●	●	●			GUI				Yes		$$$
NET-CAPI GMI (Global Market Insite, Inc.) p. 86	●		●	●	●	●	●	●	●	GUI	●	●	●	Yes		

$ = $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
NIPO CAPI System NIPO Software p. 90	●					●	●	●		Both	●	●	●	Add-on	Lease	$$$$
QPSMR CATI QPSMR Limited p. 92	●					●	●			Both	●	●	●	Yes	Lease	$$$$
QPSMR INPUT QPSMR Limited p. 92	●					●				GUI		●	●	No		
QPSMR INSIGHT QPSMR Limited p. 92	●					●	●			Both		●	●	Yes	Lease	$$
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. 80					●		●		●	GUI	●	●		Yes		
Reply Fleetwood Group, Inc. p. 84	●	●				●				GUI	●	●	●	No		
Results for Research 6.0 RONIN Corporation p. 94	●				●	●	●	●		Both	●	●	●	Yes	Buy	
SmartQ TeleSage, Inc. p. 96	●								●	GUI	●			Add-on	Buy	$$$$
SNAP Professional Snap Survey Software p. 95	●					●	●	●		GUI	●	●	●	Yes	Buy	
SSI Web Sawtooth Software, Inc. p. 95	●				●	●	●			Both	●	●	●	Yes		
SURVENT CfMC Research Software p. 82	●		●	●	●	●				Syntax	●			Yes	Lease	
Survey Genie William Steinberg Consultants, Inc. p. 96	●					●				GUI				Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc. p. 96	●					●				GUI				Yes	Buy	$
Survey Tools For Windows William Steinberg Consultants, Inc. p. 96	●					●				GUI				Yes	Buy	$
SurveyPro Apian Software p. 80	●					●		●		GUI		●		Yes	Buy	$$
The Survey System Creative Research Systems p. 82	●					●	●	●		GUI	●	●	●	Yes		$$
The Survey System - CATI Creative Research Systems p. 82	●					●				GUI	●	●	●	Yes		$$$
The Survey System - PDA Creative Research Systems p. 82	●						●							No	Buy	$
Touchview Survey Solution Touchview Survey Solutions p. 97	●						●	●								
WinQuery The Analytical Group, Inc. p. 78	●					●		●		Both	●	●	●	Yes	Buy	$
Your2Cents® Survey Creator Common Knowledge Research Services p. 82					●	●	●			Both	●	●	●	Yes		
Your2Cents® Survey Creator Your2Cents Online Opinion Panel p. 98					●	●	●			Both	●	●	●	Yes		

$ = $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
askiavoice ASKIA - Software for Surveys p. 80	●					Both	●	●	Yes		
Bellview CATI Pulse Train Ltd. p. 92	●					Both	●	●	Add-on	Either	$
Confirmit FIRM INC. p. 84	●				●	GUI	●		Yes		
CONVERSO CATI CONVERSOFT (Axiom Software) p. 82	●					Both	●	●	Yes	Either	
Dub InterViewer NEBU b.v. p. 90	●			●	●	GUI	●	●	Yes	Lease	
Eform Beach Tech Corporation p. 80	●				●	Both			Yes	Either	
Interview & Analysis Program Comstat Research Corporation p. 82											
Interviewer CATI VOXCO (Groupe Voxco Inc.) p. 98	●				●	Both	●	●	Yes	Either	$$
Interviewer VCC (Virtual Call Ctr.) VOXCO (Groupe Voxco Inc.) p. 98	●				●	Both	●	●	Yes	Either	$$
Ioxphere Xorbix Technologies, Inc. p. 98	●	●			●	GUI	●	●	Yes	Either	$$
IT CATI/CAPI/Web Interview Technology p. 86	●				●	Both			Yes	Buy	$$$$
Itracks Online CATI Itracks p. 86					●	Both	●	●	Yes		
NET-CATI GMI (Global Market Insite, Inc.) p. 86	●		●	●	●	GUI	●		Yes		
NIPO Fieldwork System for CATI NIPO Software p. 90	●					Both	●	●	Add-on	Lease	$$$$
Pulse DNA Software Suite Pulse Group p. 92	●			●	●	Both				Either	
QPSMR CATI QPSMR Limited p. 92	●					Both	●	●	Yes	Lease	$$$$
Quancept CATI SPSS Inc. p. 96			●			GUI	●	●		Either	$$$$
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	$
Results for Research 6.0 RONIN Corporation p. 94	●				●	Both	●	●	Yes	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
SNAP Professional Snap Survey Software p. 95	●					GUI			Yes	Buy	
StatPac Survey Software StatPac, Inc. p. 96	●					Syntax			Yes	Buy	$$
SumQuest Survey Software SumQuest Survey Software p. 96	●					GUI				Buy	$
SURVENT CfMC Research Software p. 82	●		●	●	●	Syntax	●	●	Yes	Lease	
Survey Said Enterprise Edition Marketing Masters p. 88	●				●	GUI				Buy	
SurveyPro Apian Software p. 80	●					GUI			Yes	Buy	$$
Sysurvey.com SySurvey p. 96					●	GUI			Yes	Lease	
TelAthena TelAthena Systems LLC p. 96											
Telescript Digisoft Computers, Inc. p. 83	●				●	GUI		●	Add-on	Buy	
The Survey Cybernetic Solutions p. 82	●					GUI	●		Yes		
The Survey System Creative Research Systems p. 82	●					GUI	●		Yes		$$
The Survey System - CATI Creative Research Systems p. 82	●					GUI	●		Yes		$$$
Virtual Call Center Network Itracks p. 86					●	GUI	●	●	Yes		
WinCati Sawtooth Technologies, Inc. p. 95	●					Both	●	●	Yes	Buy	
WinQuery The Analytical Group, Inc. p. 78	●					Both	●	●	Yes	Buy	$

Web Interviewing Software

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
ACA System Sawtooth Software, Inc. p. 95	●				●	GUI	Web	●	●	Yes	●		
AccessPoint for Market Research Global Bay Mobile Technologies p. 86	●	●	●	●	●	Both	Web	●	●	Yes	●	Either	
ARCS® ARCS® IVR Systems p. 80	●					GUI	Web	●	●	No	●	Either	$$$$
AskAnywhere Senecio Software, Inc. p. 95	●	●	●	●	●	GUI	Both	●	●	Yes	●	Lease	$$
askiaweb ASKIA - Software for Surveys p. 80	●					GUI	Both	●	●	Yes	●		
AttentionTracking MediaAnalyzer Software & Rsch., Inc. p. 88	●				●	GUI	Web	●	●	Yes	●	Lease	
BayaSoft Custom Development BayaSoft LLC p. 80					●		Both	●	●	Yes		Lease	
BayaSoft RTD - Real Time Data BayaSoft LLC p. 80					●		Both	●	●	Yes	●	Lease	
BayaSoft RTR - Real Time Reporting BayaSoft LLC p. 80					●		Both	●	●	Yes	●	Lease	
BayaSoft SMS - Sample Management Svc. BayaSoft LLC p. 80					●		Both	●	●	Yes	●	Lease	
Bellview Web Pulse Train Ltd. p. 92	●					Both	Web	●	●	Add-on	●	Either	$$$$
Bulletin Board Focus Groups Itracks p. 86					●	GUI	Web	●	●	Yes	●		
CBC System Sawtooth Software, Inc. p. 95	●				●	GUI	Web	●	●	Yes	●		
Checkbox Mobile Survey Prezza Technologies, Inc. p. 92	●					GUI	Web			Yes			
Checkbox Survey Prezza Technologies, Inc. p. 92	●					GUI	Both	●	●	Yes	●	Either	$$
Confirmit FIRM INC. p. 84	●				●	GUI	Both	●	●	Yes	●		
CONVERSO CAWI CONVERSOFT (Axiom Software) p. 82	●					Both	Web	●	●	Yes	●	Either	
CRMSurveyor WebSurveyor Corporation p. 98					●	GUI	E-mail	●		Yes	●		
Customer Connect 360 Sinclair Customer Metrics, Inc. p. 95					●	GUI	Web	●	●	Yes	●		
Cutom Panel Building Itracks p. 86					●	GUI	Web	●	●	Yes	●		
Dub InterViewer NEBU b.v. p. 90	●			●	●	GUI	Web	●	●	Add-on		Lease	
Eform Beach Tech Corporation p. 80	●				●	Both		●	●	Yes		Either	
Empathica Customer Experience Mgmt. Sys. Empathica Inc. p. 84					●		Web	●	●	Yes	●	Buy	$$$$
eQ TeleSage, Inc. p. 96	●					GUI	Both	●	●	Add-on	●	Lease	$$$
eTelescipt Digisoft Computers, Inc. p. 83					●	GUI	Web	●			●	Buy	
Eval Builder Your Perceptions p. 98	●				●	Both	Both	●		Yes	●	Lease	
Fusion Vision Critical p. 97					●	GUI	Web	●		Yes	●	Lease	
Hosted Survey Hostedware p. 86					●	Both	Both	●	●	Add-on	●	Either	
Hosterd Survey Lite Hostedware p. 86					●		Web						
IdeaMap®.Net Moskowitz Jacobs Inc. p. 90					●	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 Survey System Inquisite Inc. p. 86	●				●	GUI	Web	●	●	Yes	●	Either	$$$$
InstantSurvey NetReflector, Inc. p. 90					●	Both	Both	●		Yes	●	Buy	
Intellisurvey Intellisurvey, Inc. p. 86					●	Both	Web	●	●	Yes	●		
Internet Research Manager Domestic Data p. 83	●					GUI	Both	●	●	No	●	Lease	$$$$
Internet Survey Machine Marketing Masters p. 88	●	●	●	●	●	GUI	Web	●		Yes	●	Buy	$$$$
Interviewer Web VOXCO (Groupe Voxco Inc.) p. 98	●					Both	Web	●	●	Yes	●	Either	$$
InterVu FocusVision Worldwide p. 84	●	●											
Ioxphere Xorbix Technologies, Inc. p. 98	●	●			●	GUI	Both	●	●	Yes	●	Either	$$
IT CATI/CAPI/Web Interview Technology p. 86	●				●	Both				Yes		Buy	$$$$
Itracks Online Surveys Itracks p. 86					●	Both	Web	●	●	Yes	●		
Kinesis Survey Kinesis Survey Technologies, LLC p. 86			●			GUI	Web	●	●	Yes	●	Lease	$$$
MaxDiff/Web Sawtooth Software, Inc. p. 95	●				●	GUI	Both	●	●	Yes	●		$$$
MR Interview SPSS Inc. p. 96	●				●	Both	Both	●	●	Yes		Either	$$$$
NET-Survey GMI (Global Market Insite, Inc.) p. 86	●		●	●	●	GUI	Web	●	●	Yes	●		
NIPO Fieldwork System for Web NIPO Software p. 90	●					Both	Both	●	●	Add-on	●	Lease	$$
Online Focus Groups Itracks p. 86					●	GUI	Web	●	●	Yes	●		
Opinio ObjectPlanet AS p. 92	●	●	●	●	●		Both	●		Yes	●	Either	$
OPST (Online Panel Site Tool) Globalpark GmbH p. 86					●	Both	Both	●	●	Yes	●	Lease	$$$
Panel+ Vision Critical p. 97					●	GUI	Web	●	●	Yes	●	Lease	
PRIME: Custom Online Survey Software Enetrix p. 84					●	GUI	Web	●	●	Yes	●	Either	$$$$
QueryWeb The Analytical Group, Inc. p. 78	●					Both	Web	●	●	Yes	●	Buy	$$$$
QuestionPro QuestionPro.com p. 92					●	GUI	Web	●	●	Yes	●	Either	$$
Raosoft EZReport Raosoft, Inc. p. 94	●					Both	Both			Yes	●	Buy	$
Raosoft EZSurvey Raosoft, Inc. p. 94	●				●	Both	Both	●		Add-on	●	Buy	$
Raosoft InterForm Raosoft, Inc. p. 94	●				●	GUI	Web	●		Add-on		Buy	
Remark Web Survey Professional Gravic, Inc. - Remark Products Group p. 86	●					Both	Both	●				Buy	$$
Remark Web Survey Standard Gravic, Inc. - Remark Products Group p. 86	●					Both	Both	●		Yes		Buy	$$
Research Reporter Insight Marketing Systems Pty. Ltd. p. 86					●			●	●	Add-on	●	Either	$$$$
Results for Research 6.0 RONIN Corporation p. 94	●				●	Both	Web	●	●	Yes	●	Buy	
Sensus Web Sawtooth Technologies, Inc. p. 95	●					Both	Web	●	●	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
SNAP Internet Snap Survey Software p. 95	●					GUI	Both	●	●	Yes	●	Buy	
SNAP Professional Snap Survey Software p. 95	●					GUI	Both	●	●	Yes	●	Buy	
SSI Web Sawtooth Software, Inc. p. 95	●				●	Both	Both	●	●	Yes	●		
StatPac Survey Software StatPac, Inc. p. 96	●					Syntax	Both	●		Add-on		Buy	$$
StyleMap®.Net Moskowitz Jacobs Inc. p. 90					●	GUI	Web	●	●	Yes	●		
SumQuest Survey Software SumQuest Survey Software p. 96	●					GUI	Both			Yes		Buy	$
Survey Console QuestionPro.com p. 92					●	GUI	Both	●	●	Yes	●	Lease	$
Survey Genie - Gold William Steinberg Consultants, Inc. p. 96	●					GUI	Both			Yes		Buy	$
Survey Said Enterprise Edition Marketing Masters p. 88	●				●	GUI	Both			Yes		Buy	
Survey Select Expert SurveyConnect, Inc. p. 96	●					GUI	Both	●		Yes		Buy	$$
Survey Tools For Windows William Steinberg Consultants, Inc. p. 96	●					GUI	Both			Yes		Buy	$
SurveyClip SurveyClip p. 96	●		●	●	●	GUI	Web			No		Either	$$
surveyNgine.com Database Sciences, Inc. p. 82					●					Yes			
SurveyPro Apian Software p. 80	●					GUI	Both	●	●	Yes	●	Buy	$$
SurveySolutions Perseus Development Corporation p. 92	●					GUI	Both	●	●	Yes			
SurveyWriter SurveyWriter® p. 96					●	GUI	Web	●	●	Yes	●	Either	$
Sysurvey.com SySurvey p. 96					●	GUI	Both	●	●	Yes	●	Lease	
TestKit Hexworx Computer Services P/L p. 86	●		●	●	●	Both	Web			Yes		Buy	$
The Survey Cybernetic Solutions p. 82	●					GUI	Both	●		Yes			
The Survey System Creative Research Systems p. 82	●					GUI	Both	●	●	Yes	●		$$
The Survey System - Web Creative Research Systems p. 82	●					GUI	Both	●	●	Yes	●		$$
VantagePoint NetReflector, Inc. p. 90	●					Both	Both	●		Yes	●	Buy	
Walker Smart Loyalty® System Walker Information p. 98	●		●		●	Both	Web	●		Yes	●	Lease	$$$$
WebSURVENT CfMC Research Software p. 82	●		●	●	●	Both	Web	●	●	Add-on	●	Lease	
WebSurveyor WebSurveyor Corporation p. 98	●					GUI	Both	●	●	Yes	●	Either	$
Your2Cents® Survey Creator Common Knowledge Research Services p. 82					●	Both	Web	●	●	Yes	●		
Your2Cents® Survey Creator Your2Cents Online Opinion Panel p. 98					●	Both	Web	●	●	Yes	●		
Zoomerang zPro Zoomerang p. 98					●	GUI	Both	●		Yes	●	Buy	$$
zTelligence MarketTools, Inc. p. 88					●	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
2D VOG SensoMotoric Instruments p. 95	●																
3D VOG SensoMotoric Instruments p. 95	●																
AccessPoint for Market Research Global Bay Mobile Technologies p. 86	●							●	●								
ActiveGroup ActiveGroup p. 78											●						
ARC GIS 9.2 Business Analyst ESRI p. 84							●										
ARCS® ARCS® IVR Systems p. 80												●					
ARGUS Perceptual Mapper SPRING SYSTEMS p. 95					●	●											
Arthur The Analytical Group, Inc. p. 78			●														
ASDE Survey Sampler - Canada ASDE Survey Sampler p. 80															●		
ASDE Survey Sampler - USA ASDE Survey Sampler p. 80															●		
BrandMap WRC Research Systems, Inc. p. 98					●												
BrandProfiler WRC Research Systems, Inc. p. 98					●												
BrandTrend WRC Research Systems, Inc. p. 98				●													
Bulletin Board Focus Groups Itracks p. 86											●						
CAPI Manager VOXCO (Groupe Voxco Inc.) p. 98								●									
CART Salford Systems p. 94					●												
Claritas BusinessPoint Claritas Inc. p. 82		●		●	●	●											
Clementine SPSS Inc. p. 96					●												
Community Coder ESRI p. 84		●					●										
ConsumerPoint Claritas Inc. p. 82				●	●	●	●										
Customer Connect 360 Sinclair Customer Metrics, Inc. p. 95					●												
Cutom Panel Building Itracks p. 86												●					
Data Tailor MDSS, Inc. p. 88		●						●	●			●					
DataFit/DataFit X Oakdale Engineering p. 90					●												
DecisionPad Apian Software p. 80						●											

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
DialQ TeleSage, Inc. p. 96														●			
Dub Planner NEBU b.v. p. 90								●				●					
DynaMap/Census Tele Atlas p. 96							●										
East 3.0 Cytel Inc. p. 82						●											
ESPRI Information Tools Ltd. p. 86					●	●											
E-Tabs AutoGraph E-Tabs p. 84				●													
E-Tabs Enterprise E-Tabs p. 84				●													
E-Tabs Interactive E-Tabs p. 84				●	●												
E-Tabs Lite Reader E-Tabs p. 84				●		●											
E-Tabs Professional Reader E-Tabs p. 84				●													
E-Tabs Web E-Tabs p. 84				●													
E-Tabs Writer E-Tabs p. 84				●													
Eval Builder Your Perceptions p. 98	●																
EzMedia Plan New Age Media Systems, Inc. p. 90				●	●												
GENESYS Sampling Systems GENESYS Sampling Systems p. 86															●		
Goldminer® Statistical Innovations, Inc. p. 96					●												
HARMONI Information Tools Ltd. p. 86					●	●											
Headliner® Austin NameStormers p. 80										●							
iMARK Claritas Inc. p. 82				●	●	●	●	●									
iMARK Online Claritas Inc. p. 82				●	●	●	●	●									
Interque Crusader Services p. 82											●						
Ioxphere Xorbix Technologies, Inc. p. 98	●																●
IPSS Senecio Software, Inc. p. 95							●										
iViewX SensoMotoric Instruments p. 95	●																
iXPRESS Claritas Inc. p. 82				●	●	●	●										

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
Kinesis Survey Kinesis Survey Technologies, LLC p. 86												●					
KMRQuest KMR Software p. 88					●	●	●										
Latent Gold® Statistical Innovations, Inc. p. 96					●												
LogXact Cytel Inc. p. 82						●											
MAIA Market Attitude & Intent Analysis Hamilton-Locke, Inc. - Verbatim Analysis p. 86						●											
MapInfo Professional/MapX MapInfo Corporation p. 88							●										
Maptitude Caliper Corporation p. 80							●										
Maptitude for Redistricting Caliper Corporation p. 80							●										
Maptitude for the Web Caliper Corporation p. 80																	●
MARS Salford Systems p. 94						●											
MENTOR CfMC Research Software p. 82		●			●												
Microtab Version 6 - Professional Edition Microtab, Inc. p. 90		●															
Microtab Version 6 - Standard Edition Microtab, Inc. p. 90		●															
Microtab Version 6 SPSS Add-on Module Microtab, Inc. p. 90		●														●	
MiningSolv Decision Support Sciences p. 83					●												
MktSIM SPRING SYSTEMS p. 95						●											
M-Link The Analytical Group, Inc. p. 78			●														
MM4XL 7.0 MarketingStat p. 88					●	●									●		
MPE Data Entry & Editing DATAN, Inc. p. 82					●												
mr Studio SPSS Inc. p. 96		●		●													
MRDCL Marketing & Research Data Consultants p. 88		●															
mTAB Research Analysis System PAI-Productive Access, Inc. p. 92					●	●											
NamePro® Austin NameStormers p. 80										●							
Net-DB GMI (Global Market Insite, Inc.) p. 86											●						
NET-Focus GMI (Global Market Insite, Inc.) p. 86											●						

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. 86															●		
Net-Panel GMI (Global Market Insite, Inc.) p. 86												●					
Online Focus Groups Itracks p. 86									●								
OnTraq Marketing & Research Data Consultants p. 88		●															
Panel+ Vision Critical p. 97												●					
PASS Dataxiom Software, Inc. p. 82															●		
PCensus Tetrad Computer Applications, Inc. p. 97							●										
PEER Forecaster Delphus, Inc. p. 83						●											
PEER Planner for Windows Delphus, Inc. p. 83						●											
Perception Analyzer MSInteractive - Perception Analyzer p. 90	●																
PositionSolve Decision Support Sciences p. 83					●												
Postal Carrier Route Polygons Sammamish Data Systems, Inc. p. 94							●										
Power & Precision Dataxiom Software, Inc. p. 82															●		
PrefSolv Decision Support Sciences p. 83					●												
Pronto Telephony Solutions VOXCO (Groupe Voxco Inc.) p. 98														●			
PRO-T-S® Telephony Systems PRO-T-S® Telephony Systems p. 92														●			
P-STAT P-STAT, Inc. p. 92		●				●									●		
Pulse DNA Software Suite Pulse Group p. 92		●		●					●				●				
QBAL Jan Werner Data Processing p. 98															●		
QGEN Jan Werner Data Processing p. 98		●															
Q-Leap The Analytical Group, Inc. p. 78			●														
QPSMR REFLECT QPSMR Limited p. 92						●											
Qualboard 20/20 Research - Online p. 97											●						
QuestionPro QuestionPro.com p. 92						●					●						
Quick Tally Quick Tally Audience Response Sys., 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 EZReport Raosoft, Inc. p. 94					●	●											
Raosoft EZSurvey Raosoft, Inc. p. 94						●											
Raosoft InterForm Raosoft, Inc. p. 94						●											
Raosoft SurveyWin Raosoft, Inc. p. 94						●											
Reply Fleetwood Group, Inc. p. 84	●					●											
Report Direct Marketing & Research Data Consultants p. 88				●													
Research Reporter Insight Marketing Systems Pty. Ltd. p. 86				●	●	●		●									
Research Tracker II MDSS, Inc. p. 88							●	●	●			●			●		
Research Tracker II for Medical Respondents MDSS, Inc. p. 88							●	●	●			●			●		
SegmentSolv Decision Support Sciences p. 83					●												
SendQ TeleSage, Inc. p. 96				●		●											
Si-CHAID® Statistical Innovations, Inc. p. 96					●												
SmartForecasts® Smart Software, Inc. p. 95		●				●											
Snap3 SQAD Inc. p. 96						●											
Software G3 Rogator Software AG p. 94												●					
SOLAS Dataxiom Software, Inc. p. 82															●		
Sp-Link The Analytical Group, Inc. p. 78			●														
SSI - SNAP Survey Sampling International p. 96															●		
Statistics Calculator StatPac, Inc. p. 96						●											
StatXact Cytel Inc. p. 82						●											
StatXact Procs for SAS Users Cytel Inc. p. 82						●											
SuperCROSS Alta Plana Corporation p. 78				●	●	●											
SuperWeb Alta Plana Corporation p. 78				●		●											
SurveyClip SurveyClip p. 96											●						●
Surview Sales Media Research Edition Bruce Bell & Associates, Inc. p. 80						●											

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
Sysurvey.com SySurvey p. 96	●	●										●					
TestKit Hexworx Computer Services P/L p. 86				●			●								●		●
The Rite Site Easy Analytic Software, Inc. p. 83							●										
The Survey System Creative Research Systems p. 82												●					
The Survey System - Web Creative Research Systems p. 82												●					
TransCAD Caliper Corporation p. 80							●										
Trial Map SPRING SYSTEMS p. 95						●											
Turbo Spring-Stat SPRING SYSTEMS p. 95					●	●											
USORT The Uncle Group, Inc. p. 97		●															
U-Tab Weeks Computing Services p. 98				●	●												
Vertical Mapper Tetrad Computer Applications, Inc. p. 97							●										
VideoMarker FocusVision Worldwide p. 84											●						
Virtual Call Center Network Itracks p. 86								●									
Voxco Command Center VOXCO (Groupe Voxco Inc.) p. 98								●						●			
WebSurveyor WebSurveyor Corporation p. 98	●					●											
WinLink The Analytical Group, Inc. p. 78			●														
XSight QSR International p. 92									●								
Zip + 2 Polygons Sammamish Data Systems, Inc. p. 94							●										
Zip + 4 Centroids Sammamish Data Systems, Inc. p. 94							●										
Zip Code Polygons Sammamish Data Systems, Inc. p. 94							●										
Zipfind Xionetic Technologies, Inc. p. 98							●										

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Trade Talk

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are often quite low, these firsthand recommendations and other word-of-mouth-based tips play an important role in product awareness and trial. And while some of these low-income consumers may not be able to read, they are frequent television viewers, so a product's visual identity and its ability to communicate using graphics are key.

Crucial messages

Sherman said the research held some crucial messages for marketers, advertisers and any company wanting to target the lower-income consumer in these countries. "The low-income market is large, and while not rich, these consumers are savvy, discerning and in need of affordable solutions that still deliver the core benefit they are looking for, as well as the quality," he said. "This may mean the same product in smaller, more affordable packaging, a scaled-down version of a product or a product with simplified, less expensive design.

"Marketers also need to understand that the competition they face in such a market is not just from other brands within a product line but from other product categories altogether, as due to budget restrictions, low-income consumers face choices between two entirely different types of products, rather than choices between brands.

"It's worth noting that this finding does not apply in the same way in developed markets. Synovate also surveyed the U.S., U.K. and Japan for the purposes of comparison and found that, in these markets, low-income consumers have very different priorities and attitudes to their middle-class counterparts," Sherman said. | Q

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trade talk

By Joseph Rydholm
Quirk's editor

For emerging-market consumers, low incomes don't mean low standards

Despite their disadvantaged situations, low-income consumers in the world's emerging markets have much in common with their middle-class brethren, according to a study by Synovate.

Synovate surveyed over 8,000 consumers in 14 countries around the world, using a combination of quantitative and qualitative approaches, to gain a better understanding of their attitudes, values and purchasing habits. The countries surveyed were: Argentina, Brazil, China, Egypt, Hungary, India, Indonesia, Mexico, Poland, Romania, Russia, South Africa, Thailand and Turkey.

"Low-income consumers want many of the same things out of life and their products as their middle-income counterparts, but are constrained by their relatively limited purchasing power," said Mike Sherman, Synovate executive director consumer insights, in a company press release. "This suggests that as their income grows - which is projected to happen in many of these markets - the lower-income consumers will display the same kind of spending habits as the middle class," he said.

Health, family and physical security are the top three most-important things in life for more than 80 percent of low- and middle-income consumers, followed by a good home, an education and a good income. (For the purposes of this analysis, Synovate defined low-income consumers as those at the bottom income quartile of the population and middle-income consumers as those in the second and third quartiles.)

When asked how they would use the extra money if given a 20 percent increase in income, 38 percent of low-income consumers would spend their extra income, 47 percent would save or invest it and 15 percent would pay off debt. Similarly, 34 percent of middle-income consumers would spend it, 56 percent would save or invest it and 10 percent would pay off debt.

Prefer local brands

The different income classes share similar brand perceptions. If price and quality are equal, just under two-thirds of low-income consumers prefer local brands; one-third believe local brands are as good as international brands; and 31 percent agree that most people don't know the difference between local and international brands - responses which all mirror those of middle-income consumers.

A host of factors loom large as influences on the product choices of low-income consumers. Limited transportation options force many of them to shop locally, giving neighborhood merchants a lot of sway over purchasing habits, both via the products they stock and the products they recommend. In communities where literacy rates

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