QUIRK'S

Marketing Research Review

FEBRUARY 2008

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in case you missed it...

news and notes on marketing and research

Are low-sodium products worth their salt?

As reported by Brandweek's Vanessa L. Facenda, some food marketers are rolling out low-sodium options as a way to appeal to aging Baby Boomers. Del Monte, for example, has 25 low-sodium or no-salt-added products across its portfolio. "The low-sodium/no-salt business is small, only about 5 percent of our sales, but it's growing," said Apu Mody, senior vice president - consumer products. Del Monte introduced organic products three years ago, which has improved sales of low-sodium items. Kraft also offers several low-sodium and unsalted versions of its products, like Reduced Sodium Triscuits and Lightly Salted Planters nuts.

Juli Mandel Sloves, senior manager of nutrition and wellness at Campbell Soup, said sodium reduction is the top strategic priority for R&D at the company. "We are focusing on how to lower sodium across our entire portfolio," she said. Campbell uses a proprietary lower-sodium sea salt in its offerings, of which it now has nearly 50.

Sloves echoed Campbell president/CEO Douglas Conant's claim to analysts in September 2007 that low-sodium entries were bringing lapsed brand loyalists back to the fold: "The soup sales have exceeded our expectations and have been incremental to sales of our base brands."

So far, the growth of the low-sodium foods category is modest. Datamonitor Productscan Online reported that 4.1 percent of foods today are making low-sodium claims, up from 2.5 percent in 2002.

Proponents of the low-sodium diet point out that the nation's 76 million Baby Boomers are squarely in middle age, when sensitivity to salt becomes a health issue. (Salt makes the body retain fluid, making it harder for the heart to pump blood.)

But consumers aren't yet at the point where they're demanding low-sodium foods, Mody said. "There is some interest, but we're not seeing a huge consumer movement toward the desire for low-sodium offerings. It will become a greater area of focus for consumers, but we're not there yet." Retailers are the ones asking for more low-sodium products, he said.

Time will tell if consumers' demand for lower-salt products will materialize. Cereal firms sensed a similar groundswell for low-sugar cereals three years ago. But low sales prompted General Mills to pull two of its 75 percent-less-sugar cereals from shelves last year.

The low-sodium movement is another case in which marketers have cope with the changing winds of consumers' diet-related obsessions. "Every few years we have a new fad in regards to what's important in food," said Simon Sinek, president and chief strategic officer at Sinek Partners, New York. "First it was low-cal, then it's high- this or low- that, or no carbs...every few years we get something new that we're fixated on. Food marketers are constantly reacting to what the fad is."

"Food Firms Prep for Salt-Free Wave," *Brandweek*, November 12, 2007

Let me stay in my home, seniors say

Senior citizens fear moving into a nursing home and losing their independence more than death, according to a study, "Aging in Place in America," commissioned by Clarity and the EAR Foundation, that examined the attitudes and anxieties of the nation's elderly population.

The vast majority of seniors (89 percent) want to age in place - or grow older without having to move from their homes - and more than half (53 percent) are concerned about their ability to do so. Seniors living at home are determined to maintain their independence; they report that they require - and receive - limited support from their children or other caregivers.

Seniors cited three primary concerns that could jeopardize their ability to live independently: health problems (53 percent); memory problems (26 percent); and the inability to drive and/or get around (23 percent).

They said they do not expect nor do they receive much support from those around them. The majority of seniors (55 percent) view themselves as very independent in that they receive no assistance from their children and seem content with that fact. The vast majority (75 percent) said their children are involved "enough" in their life.

Seniors who do require help from others receive assistance with household maintenance (20 percent), transportation (13 percent) and health care (8 percent). Very few (1 percent) reported receiving any financial support.

Men want to look nice too

According to Harleysville, Pa., consulting firm the Natural Marketing Institute (NMI), men's personal care is the fastest-growing segment in the bath and body care category. In part driven by the advent of the metrosexual, the most critical aspect of this trend has been the growth of a youth culture which places increasing social and media pressure on men to be young, fit and well-groomed. The job market is flooded with aging Boomer men who are striving to maintain their competitive advantage through greater investment in their personal appearance.

The culmination of these factors is driving market expansion across generations and giving men a newfound permission to participate fully in the category, according to NMI. Interest in having natural, organic and eco elements to their personal care products (not just in the foods that they eat) and the prevalence of these products in mainstream retail environments is also leading more men to the category.

According to Linda Povey, a vice president of strategic consulting at NMI, "More men are gaining exposure to the personal care category as a direct result of their participation as primary grocery shoppers. Men's role as the primary grocery shopper has almost doubled from 26 percent in 1999 to 41 percent in 2006, allowing them greater access and interaction with products and brands."

Because of this shift, NMI looks for men to become increasingly accommodated in traditionally female environments such as grocery, drug and specialty retail. The challenge will be for retailers to understand how men shop, representing a unique opportunity in effectively marketing and merchandising to them versus women.

GLBT consumers will switch to pro-GLBT companies

According to a national survey by Harris Interactive, Rochester, N.Y., approximately one in four (24 percent) gay, lesbian, bisexual and transgender (GLBT) adults say they have switched products or service providers because they found a competing company that supports causes that benefit the GLBT community in the past 12 months, assuming that other

factors such as price, quality and convenience were not considerations. This includes fully one-third (32 percent) of gay men who say they have switched products or services within the last 12 months because they found a competing company that supports GLBT causes.

These are a few highlights taken from a nationwide survey of 2,868 U.S. adults (ages 18 and over), of whom 350 self-identified as gay, lesbian, bisexual or transgender. The study was conducted online between August 7 and 13, 2007, by Harris Interactive in conjunction with Witeck-Combs Communications Inc., a Washington, D.C., public relations and marketing communications firm.

The survey also found that a high proportion of gay men and lesbians (70 percent) had switched products or service providers because they learned the company engaged in actions that are perceived as harmful to the GLBT community.

In terms of their brand loyalty behavior, about two-thirds (66 percent) of all GLBT adults reported that they would be very or somewhat likely to remain loyal to a brand they believed to be very friendly and supportive to the gay, lesbian and transgender community - even when less-friendly companies may offer lower prices or be more convenient. Three out of four (75 percent) gay men and lesbians also said they would remain loyal to the gay-friendlier brand.

"For nearly a decade, we have tested customer loyalty benchmarks, to better understand the connection between GLBT consumers and brand reputations. Consistently, no matter how we frame the questions, we find GLBT consumers place a high value on brands that earn and grow respect within the community," says Wes Combs, president of Witeck-Combs Communications. "They remain loyal to companies that support causes that are important to them and are highly motivated to learn about corporate social responsibility in all its forms. They are among consumers most motivated to vote with their dollars." For more information visit www.harrisinteractive.com or www.witeckcombs.com.

Market to men as dads, not just as men

More than 80 percent of fathers report being solely responsible for or sharing in the family purchase decisions in categories ranging from fast-food dining to DVDs to toys and games. However, few marketers are talking to this growing segment, according to a new study released by Smarty Pants, a New York research firm.

"The landscape of fatherhood has radically changed. Today's fathers are taking an active role in parenting - and shopping for - their children ages 0-12. This 'new American dad' is involved, committed and he's a shopper," says Wynne Tyree, president of Smarty Pants. "It suggests that a family marketing paradigm shift is upon us. Reaching 21st century families is not just about connecting with moms and kids and fulfilling their needs; it's about reaching dads as well."

The spring 2007 study revealed that nearly two-thirds of dads spend more time with their kids than their fathers did with them. And 90 percent say they feel that they are doing as good or better job parenting than their own fathers. Fathers report spending over five hours per weekday with their children and more than 6.5 hours on weekends, up considerably from the 2.5 hours per day dads spent with their children in the 1960s. The new together-time is devoted primarily to co-viewing TV, reading, listening to music, and horseplay, but the new American dad is also spending time playing video games, e-mailing and surfing the Web with his children.

"The quality time that fathers spend with their children presents considerable opportunities for marketers, because much of it involves technology, media and recreation," says Tyree. "Not only are fathers hungry to be recognized and marketed to, but they are plugged into the right marketing channels. Unfortunately, most marketers are either ignoring them or talking to them as men only, which is different than speaking to them as fathers."

The study finds that a handful of marketers are reaching out to the new American dad. Fathers interviewed for

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names of note

Eva Jordan has been named vice president, advanced analytics at Cranford, N.J., research firm *Knowledge Networks*. In addition, **Daniel Rosen** has been named vice president, advanced analytics and consulting and **Harry Bhavatha** has been named project director.

Montgomeryville, Pa., research firm *J. Reckner Associates Inc.* has named

Ward Aukers

Cindy Ward and **Steven M. Aukers** senior vice president. In addition, **Beth Logan** has been named account director.

Klaus L. Wubbenhorst, CEO of German research firm *GfK Group*, has been awarded the Federal Cross of Merit, acknowledging his achievements for business and society.

G & S Research, Indianapolis, announced three promotions and a new hire. **Wendy Martin** has been

Martin Axe

promoted to manager, client services, and **Elizabeth Woerly** and **Ashley Gardner** have been promoted to analyst. **Megan Axe** has been added as director, client services.

Harris Interactive, Rochester, N.Y., has named **Peggy Lebenson** senior vice president.

Vancouver research firm *Vision Critical* has named **Jason Smith** president and COO of its panel division. The firm has also named **Jeremy Holt**

Holt Albert

sales director and tapped him to lead its new London branch along with Sales Manager **Paul Albert**.

Survey Sampling International, Fairfield, Conn., has promoted **Debi**

Hart Lorch

Hart to vice president, global panel solutions, based in the Netherlands; and **Jackie Lorch** to vice president, global knowledge management, based in Fairfield. The firm has also named **Kim Giangrande** vice pres-

Giangrande Subbiah

ident, global human resources; **Suresh Subbiah** vice president, global client services and delivery; and **Harold Kelley** vice president,

Kelley Wells

global marketing.

Atlanta research firm *CMI* has named **Angela Wells** senior marketing consultant.

Stamford, Conn., research firm *InsightExpress* has promoted **Suresh Kollipara** to senior database architect, **Dan Koppie** to software engineer and **Janelle Taylor** to software quality assurance specialist. In addition, the company appointed **James Eastwood** junior database administrator and **Ramon Llenado** Internet developer. And it promoted **Joseph Cesaria** to group director and **Niki Tyson** to director. **Kevin Evers** has been named account manager.

Seattle research firm *Global Market Insite Inc.* has named **David Parker** CFO.

Greenfield Online Inc., Wilton, Conn., has named **Mark Shepard** director of Internet survey solutions in Japan.

Chicago software firm *SPSS Inc.* has appointed **Patricia B. Morrison** to its board of directors, increasing the board size from seven to eight members. Morrison will

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Mediamark tests RFID tags in magazines

New York-based Mediamark Research and Intelligence (MRI) is collaborating with DJG Marketing and Waiting Room Subscription Services (WRSS) to test radio frequency identification (RFID) technology as a means of measuring magazine readership in public waiting rooms.

The joint test with WRSS follows more than a year of in-house testing by MRI of RFID technology, which uses microchips, antennae and radio waves to identify people or objects. MRI's objectives in the collaboration are to determine whether the company's RFID-driven Passive Print Monitoring System can reliably measure - in a waiting-room setting - the total time spent with a specific magazine issue, the number of individual reading occasions and, potentially, reader exposure to individual magazine pages.

These types of information are seen as potential enhancements to the magazine audience estimates drawn from MRI's Survey of the American Consumer, which is based on in-home interviews.

"The testing we did in-house from September of 2006 through August of 2007 suggests the power of RFID technology can be harnessed to provide passive measures of magazine pick-ups and time spent reading in public places," says Jay Mattlin, senior vice president of New Ventures at MRI. "At this stage, we need to test our Passive Print Monitoring System in a non-laboratory setting to determine how well it holds up in this important reading environment."

DJG Marketing will help to facilitate the public-place testing via its Waiting Room Subscription Services unit.

For MRI's internal tests, the company created an "intelligent" magazine prototype - containing the Passive Print Measuring System - that keeps track of reader activity with designated pages. Essentially, an RFID tag attached to the magazine sends a signal to a tag reader each time the test subjects turn to one of the designated magazine pages. The system records the times of the openings and closings of designated pages, as well as the opening/closings of the magazine itself. Mattlin reported at a conference of print researchers that the system correctly identified magazine openings and closings an average of 95 percent of the time in these internal tests. The Passive Print Measuring System will now be placed in a set of magazines and tested in real-world waiting rooms with WRSS, using its proprietary database of waiting room locations.

"There are a myriad of factors that affect how RFID technology would work in different settings," says Mattlin. "We've learned a lot so far in our controlled environment, but considering the complexity of trying to measure a non-electronic medium, like magazines, with electronic signals, it's going to take a while before we have a firm grip on the full potential of RFID with regard to magazine audience measurement. On the positive side, these early internal tests were very encouraging and we hope to deepen our practical knowledge via this public-place testing." For more information visit www.mediamark.com.

New medical media planning service

Kantar Media, New York, has launched the MARS Medical integrated media planning and buying system. Complete with health care readership surveys, media publisher rates and competitive data, the system is available for use by both agencies and publishers. Features include Web-based media usage research studies among health care professionals packaged with competitive media advertising data and ad scans. The MARS Medical system includes media reach-and-frequency metrics developed in conjunction with KMR Software and the KMR Group's TGI research group. For more information visit www.kmr-group.com.

Knowledge Networks offers guides to online research, panels

San Francisco research firm Knowledge Networks is now offering two new resources to illuminate the world of online research and panels. Available at www.knowledgenetworks.com/dmg/index.html, "The Decision Maker's Guide to Online Research 2007" is a 24-page booklet that can help users identify high- versus low-quality approaches to online research, including seven criteria for a top-quality job. "The Decision Maker's Toolkit for Evaluating Online Panels and Research" is a collection of more than 20 articles, white papers and other resources to help users sort out the key issues in online research quality. It is available as a CD-ROM or a ZIP download.

Eularis updates pharma marketing report

London firm Eularis has released an update to its report, Ensuring Profitable Return-on-Investment (ROI) in Pharmaceutical Marketing: Using Analytics and Metrics to Improve the Bottom Line. Originally offered in February 2007, the report has been revised to provide pharmaceutical marketers with the latest research information.

Eularis identified a common problem faced by pharmaceutical companies: how to know which activities impact market share and by how much. The company assembled a group of mathematicians in the

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research industry news

News notes

New York research firm **Kantar Group**, a division of WPP, of which Millward Brown is a part, announced a restructuring of its media businesses. Products and services that will move into the newly formed Kantar Media Research unit include Millward Brown Group firms TGI, KMR Software and IntelliQuest CIMS. Other parts of the new company will be MARS Pharma and MARS Medical, as well as TV ratings businesses and media solutions in over 40 worldwide markets through equity interests in AGB Nielsen, IBOPE, RSMB, Marktest and MRB Hellas. Andy Brown will lead the reconstituted KMR as CEO.

Effective last month, Germany-based **GfK Group**'s organizational structure now focuses on three sectors rather than the five previous business divisions. The five business divisions - custom research, retail and technology, consumer tracking, media and health care - are now set up as the three sectors of custom research, retail and technology, and media. Gérard Hermet will remain responsible for the retail and technology sector and Wilhelm R. Wessels for the media sector, with no change.

Responsibilities will change in the custom research sector, which comprises the custom research, consumer tracking and health care divisions. Within the custom research division, Debra A. Pruent has joined the firm and is responsible for the North America region and Petra Heinlein for all other regions. Wessels retains responsibility for the consumer tracking and health care divisions within the custom research sector.

San Francisco research firm **MarketTools Inc.** has filed a patent application for its Survey Fraud Detection System and Method with the United States Patent and Trademark Office. MarketTools' patent-pending data validation technology identifies and removes fraudulent responses from data sets before they can impact the accuracy of research results.

The daughter of a Missouri woman who disappeared in December 2004 has filed a wrongful-death lawsuit against three firms tied to the door-to-door surveys the woman was conducting when she was last seen alive.

In the petition, Brandy Shipp blames the companies for several failures that allegedly led to her mother Summer Shipp's death. Among the allegations are failing to foresee the danger and risk associated with door-to-door surveys and

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Calendar of Events February-May

IIR will hold a conference on linkage strategies on February 24-27 at the Doral Golf Resort & Spa, Miami. For more information visit www.iirusa.com.

The American Marketing Association will hold the training seminar "Conjoint Analysis and Discrete Choice Modeling: Introduction, Comparison, and Evolution" on February 27-28 at the Gleacher Center in Chicago. For more information visit www.marketingpower.org.

IIR will hold a conference on youth marketing on March 2-5 at the Marriott Newport Beach Resort and Spa, Newport Beach, Calif. For more information visit www.iirusa.com.

ESOMAR will hold a conference on automotive research on March 3-5 in Switzerland. For more information visit www.esomar.org.

The Northern California Pacific Northwest, Southern California and Southwest Chapters of the Marketing Research Association will hold their annual Las Vegas conference on March 5-7. For more information visit www.mra-net.org.

The Pharmaceutical Marketing Research Group will hold its annual conference on March 9-11 at the Marriott Desert Ridge in Phoenix, Ariz. For more information visit www.pmrg.org.

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on March 31-April 2 at the New York Marriott Marquis. For more information visit www.thearf.org.

ESOMAR will hold its Asia-Pacific conference on April 7-9 in Singapore. For more information visit www.esomar.org.

The Qualitative Research Consultants Association and the Association for Qualitative Research will hold a worldwide conference on qualitative research on May 7-9 in Barcelona, Spain. For more information visit www.aqr.org.uk or www.qrca.org.

ESOMAR will hold its annual Latin American conference on May 11-14 in Mexico. For more information visit www.esomar.org.

The American Association for Public Opinion Research will hold its annual conference on May 15-18 in New Orleans. For more information visit www.aapor.org.

The U.K.-based Business Intelligence Group will hold its annual conference, which focuses on business-to-business marketing and research, on May 21-23 at the Marriott St. Pierre Hotel in Chepstow, England. For more information visit www.bigconference.org.

Canada's Marketing Research and Intelligence Association will hold its annual conference on May 25-28 in Winnipeg. For more information visit www.mria-arim.ca.

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. For a more complete list of upcoming events visit www.quirks.com/events.

By Pam Goldfarb Liss

Getting great insights from kids in focus groups

Today's kids are savvy consumers but sometimes their monosyllabic answers in focus groups may not reflect those smarts. It is a mistake to underestimate their input or take it just at face value. Kids and teens require a bit more creativity to get the answers your client is seeking.

Creativity always begins with uncovering a client's ultimate success criteria for the project. Starting with that and an understanding of the age group being researched, you can creatively pull out ways to gain the insights your client seeks.

After learning what your client defines as success, create a series of tricks and backup options for the many different possible scenarios that might happen with kids. Use these to help your clients get the insights they need. Clients in turn need to have their expectations appropriately managed by the moderator. The moderator must explain after each focus group what kids really said and how their different insights – no matter how odd – all contribute to helping them get the information they need.

Smaller groups are always best with kids and teens alike. In younger ages, recruiting with buddies can create the comfort level necessary for kid respondents.

Keep in mind that kids' attention spans are short. Depending on the age of the kids, a typical group lasts no more than 60 minutes; many are typically 30 minutes.

Following are some kid-friendly techniques.

• *Pre-session "lobby" survey/homework*

These assignments should be short, quick opportunities to better understand your respondent. Kids want to express themselves and be heard. Having them fill out a diary about who they are - their likes/dislikes, favorite people, places and things, families, etc. - is always illuminating when shy kids don't respond or answers are inconsistent in focus groups. It's your backup if you don't get what you need in the focus groups and can often connect other things for you and the client.

• *Ask "why" right away*

"Why" shows interest in what they have to say. It's a word they ask of each other when they're interested. Moderators must bring it back into their vocabulary for kids' groups.

• *Get them to "sell" the product*

Every kid has a best friend who they want to influence. Use this approach, in which you ask them how they would talk to a best friend about the product, to encourage kids to expand their comments beyond observations such as, "I just like it" and to

Editor's note: Pam Goldfarb Liss is a moderator with LitBrains-Igniting Ideas!, a New York research firm. She can be reached at pam@litbrains.com.

telling you what about the product or service is important to them. This "best friend" sales pitch will reflect how they really feel about what the product offers.

• *Keep a bag of tricks available*

Kid-friendly moderators need to have their Plan B ready with a second set of questions and activities in mind if they need to switch gears. Structure your discussion guide to accommodate either a mellow line of questions, an active set of group exercises or a set of individual written exercises. Use these different activities as needed to get your answers.

• *Push praise in the first five minutes*

Flattery will get you everywhere with kids. With a simple "Thank you" or "Wow, great idea!" to each kid inside the first five minutes, a discussion can engage every one. Kids are obvious lovers of praise. The discussion benefits greatly when everyone participates. Make sure each kid feels his or her contribution is really helping!

Have context

With the pre-session homework and/or in-the-lobby questionnaire in hand, you will have context for much of what your groups of kids answered. Think about your client's objective. Consider what was said in the discussion. Often with kids, there will be a missing piece that connects their answer to what they really meant or even the influences that got them there. It won't be obvious. Remember, kids rarely make the decision just because they liked it. Mom may be the culprit. The older sibling could be. Sometimes even the popular kid at school is the reason why they like something. Even money or household size also may affect how their decisions are made. Either way, your client's ultimate learning will come from all of these factors. This is where your creativity and experience comes into play by analyzing what influences them.

Never ambiguous

Focus groups with kids are never ambiguous. Kids know what they like and don't. After the discussion ends, it is up to the moderator to make those black-and-white answers into deep and usable insights for their clients. The focus group formats are also important to insure that every child is heard and the insights are plentiful.

Kids will produce great insights with creative approaches and the right format. Ultimately, it comes down to helping a client understand the opportunities with children, not the limitations! | Q

By Kelley Styring

Loose change, lotion and expired coupons

What else did researchers find when they asked one hundred women to open up their purses?

This article is based on an ethnographic project in which the contents of the purses of 100 women in Portland, Ore., and Plano, Texas, were analyzed in great detail. The women, ranging in age from 18 to 64, were recruited in shopping malls. The exploration began with taking each purse's weight and measurements and photographing its contents (the women weren't allowed to clean out their purse in any way prior to the research). The respondents then emptied the contents and were asked a series of questions regarding the purse: history, habits, likes/dislikes, etc. The contents were grouped by the respondent, and the groups were named and inventoried. Each respondent then participated in a qualitative interview to assess the bag's emotional role, context and the woman's history carrying a purse.

More than 30 product categories were represented in the purses we examined. There are 15 product categories that are found in more than half of all purses - demonstrating the vital nature of these items, since they must be carried on her person every day.

Access to finances comprises the most important category of items in the purse. Cell phones and keys comprise the rest of the top tier of items. Second-tier items include medications, sunglasses and beauty care items. Third-tier items include cigarettes, glasses and schedulers/planners.

The remainder of this article explores some of the top product categories in detail from most common to least common.

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Finance: 99 percent
Nearly every respondent in this study carries some items of a financial nature: wallets, checkbooks, credit cards, debit cards and other bank information. Women who are married, college-educated and with higher incomes are more likely to carry credit cards and carry more types of cards. Those who frequently use coupons are more likely to carry store-brand credit cards, indicating a higher level of shopping involvement than the average respondent. Women who carry heavier bags with a higher number of items are more likely to carry credit cards and a checkbook. Conversely, smaller bags are less likely to contain a checkbook and more likely to bear loose cash.

Women carry $42 on average in their purses: $30 in the wallet, if they have one, $10 in cash loose in the purse or in a pocket and about $2 in loose change. Change is accumulated over time and rarely accessed at retail. An enterprising retailer might develop a system that stores change under $1 on a reward card. Upon next purchase, the reward card would apply that change as a discount to purchase. This rewards the customer and removes cost from the retail system in terms of coin management.

Reward cards and memberships: 98 percent
The rewards and memberships category comprises video/club cards, retail reward cards, punch cards for frequent buyers, library and gift cards. Nearly all respondents in this study carry some type of membership documentation in their purses. Retail reward cards are carried by nearly three out of every four respondents. This is followed closely by membership cards for video or club stores. Blockbuster Video tops the list of specific brands but is overshadowed by the total collection of punch cards for frequent purchases, most often for local merchants. Keychain cards are prevalent.

Given the numbers of cards carried, they contribute significantly to complexity and clutter in the purse. Alternatives to cards would be appreciated by women to streamline transactions and improve "findability" in the purse.

Office supplies: 93 percent
Almost every respondent had some type of office supply in her purse. Pens and other writing utensils are the most commonly carried items; promotional pens from companies or "various" sources are the most

common type of pen. Pencils, on the other hand, are rarely branded.

Scraps of paper or notes and lists are the next most common, typically carried to remind the respondent of important information. These scraps are frequently forgotten and become trash that clutters the bag. This suggests opportunity for information management that could be leveraged by personal technology devices.

Beauty/hair care: 91 percent
Beauty care is one of the most extensive categories represented in the average purse. It consists of cosmetics, cosmetic accessories, fragrances, moisturizing lotions and hair care items. Lip cosmetics lead the way in terms of beauty care items in the purse with only 14 percent of all purses not containing a lip cosmetic.

Many of these products were purchased in attractive packages that, over time, were damaged, removing brand appeal and brand identification. This indicates an innovation opportunity for both packaging and printing technology.

Nearly a third of all purses contain some type of skin cosmetics. Powder/compacts top the list with nearly one out of every four women carrying it in their purse. Foundation, concealer and blush round out the other top skin cosmetics in the bag.

For almost half of those carrying a cosmetic accessory, that accessory is a makeup bag used to collect loose items into "findable" units in the purse.

One in five women carries a fragrance in her purse. Many of the fragrances observed were not in smaller travel sizes. Fragrances tended to be light in potency, like body mist or spray, and not high-end, designer fragrances.

One in three purses contains a moisturizing lotion, principally for hand and body use. While some lotions may have contained sunscreen, this is clearly not yet a prevalent behavior or recognized benefit.

One in five women carries a brush and/or comb for grooming. Importantly, there were no styling products in any of the purses researched.

Identification: 91 percent
Most women in this study carry some type of personal identification. Most identification is in the form of a driver's license. About half carry other identifying documents, most frequently a Social Security card. ID badges for employment, school or other purposes are carried about as often.

Very few respondents use a specialized ID holder. This may be an opportunity for innovation to help respondents quickly and easily retrieve identification when needed.

Security and access: 86 percent
Car lock/remote: 19 percent
More than four out of five respondents carry keys. Car lock fobs (electronic openers) are carried by nearly one in five women in this study. Garage door openers are carried in purses by 2 percent of women in this study. ID badges, carried by one in five, are included in this section because they give access to the workplace via bar codes or electronic swipe readers.

Interestingly, women carry keys and keychains in great big gobs. Women frequently use the sound of the keychain while shaking their purses to locate their keys. Keychains are often adorned with sentimental items, souvenirs and gift keepsakes. Innovation in this area would focus on what could help women streamline their keychains, yet find keys quickly or eliminate the need for keys altogether.

Receipts: 85 percent
Women carry receipts in their purses and hold onto them somewhat compulsively. Over time, these receipts become outdated, damaged and degrade into trash. When they are disposed of, it is en masse, as the bag is cleaned and restored to greater utility.

Cell phones/accessories: 74 percent
Nearly three quarters of all purses contain cell phones, and many also hold some type of phone accessory such as chargers, ear pieces, etc. The most common brands of cell phones include Motorola, Samsung and Nokia.

Some women carry their cell phones in an external pocket of the bag for quick access. Others used very loud ring tones as a way to locate the phone loose in the bag. Yet others purchase a cell phone pouch that attached to the bag. All of these behaviors suggest the importance of the cell phone, the premium placed on quick access when needed and how women use different methods to increase findability.

Insurance: 71 percent
Nearly three quarters of all respondents in this study carry insurance documentation in their purse. Medical/dental tops the list of types of items carried for insurance purposes.

Many respondents also carry insurance paperwork in their purse either as proof of insurance (medical) or to follow up on issues noted in the paperwork. In many cases, these important items are damaged and difficult to read. This suggests an innovation opportunity.

Food, gum, candy: 63 percent
More than half of all women with purses carry some type of food item. This is most often a mint, candy or gum item, though more than 5 percent carry some type of bar product, like a granola bar. This suggests a need for highly efficient foods or beverages or nutritive gums or mints that offer filling, nutritious, on-the-go benefits with little bulk in the bag.

Health care: 61 percent

Many women who carry a purse carry at least one health care item, mainly medications. Pain medications top the list of remedies carried in the purse. Birth control pills are carried by 6 percent of respondents.

Many prescription bottles are unmarked, unlabeled and contain unidentifiable medications. One out of every 10 respondents had at least one loose pill in the purse, typically discarded at the end of the interview along with other trash.

Packaging and organization of medical items could solve important problems for women including safety, hygiene, identification of medications and the ability to find these critical products when needed.

Coupons: 61 percent

One in three respondents uses coupons for more than half of her grocery trips, yet coupons are carried by nearly two-thirds of respondents. This suggests opportunity for innovative approaches to couponing and coupon-carrying mechanisms.

Brand coupons are underrepresented in purses, suggesting that they are not as appealing as store coupons or those for other outlets such as restaurants (coded as "various").

Coupons were a frequent "discard" during the course of these interviews. Almost one in 10 women threw a coupon in the trash when her interview was complete. Most often this was due to expiration but sometimes due to interest that had waned between clipping the coupon and the opportunity to redeem.

Eye care: 61 percent

More than half of respondents carry items for vision care in their purse. Sunglasses are the most common vision care item, carried by a full 40 percent of women in this study. Eyeglasses are carried by about a third, and nearly one in six carries eye drops. Eye care items require special care and are generally in some type of case/holder. Sunglasses are not always stored in this way and so are subject to damage and wear.

Photographs: 59 percent

Nearly 60 percent of total respondents carry photographs in their purses. Generally, these are photographs of loved ones. Unfortunately, most of them are not enjoyed often because they are stuffed in wallets behind credit cards and other items. In fact, very few are kept in any type of photo holder or case.

Trash and scrap paper: 51 percent

Trash was accounted for in two ways in this study. First, women were asked to designate a pile for trash. This tended to include obvious things like gum and candy wrappers (most common), loose tobacco, straw wrappers and other debris, typically made of paper.

About half of all women in this study could create such a pile.

Respondents would then add "discards" - what they wanted to throw away at the end of the interview - to the trash pile. While wrappers are trash automatically after the item is unwrapped, other things become trash over time. Coupons expire, receipts become irrelevant and other items like cough drops, pens and pencils and even tampons can't survive the harsh purse environment. Packages that dispense product without leaving wrappers behind and products that are packaged sturdily are two of many potential avenues to pursue.

Nail care: 31 percent
Nail files and clippers are carried by close to one-third of all women in their purses. Nail polish is carried by only 4 percent of all respondents. This suggests that the occasions for nail care are quick touch-up or damage repair and not beautifying moments. This could open doors for innovative new products.

Feminine care: 28 percent
One in four women carries tampons or pads in her purse. This number is surprisingly low, given the number of women who claim that the need for feminine protection is why they started carrying a purse. It may be that women carry them only in anticipation of need. Equally as likely, however, is the fact that keeping these products in the purse long-term leads to damage and lack of usefulness because of insufficient packaging protection for purse storage.

Tissues: 27 percent
One in four women carries facial tissues, often loose or in sandwich bags from home. Only 6 percent of women discarded tissues at the end of our interview. This suggests that the tissue is considered important by those who carry them but insufficiently protected, so they compensate by bringing their own bags or just tossing them out when they become too grimy to use. This situation offers many avenues for package innovation in this category.

Hand sanitizers/moist wipes/skin cleaners: 23 percent
About one in four carries a cleansing product for personal use. Hand sanitizer outpaces moist wipes by about 50 percent. This suggests a strong need to clean hands without water.

Food/drink supplies: 23 percent
Almost one in four respondents carries an eating or drinking implement of some type. Most of these are napkins or toothpicks, but a few are carrying utensils, straws and even bottle openers in their purses. All of these items are susceptible to the unclean environment of the purse. Some of them were wrapped but not wrapped well and most were unwrapped.

Oral care: 22 percent
Oral care items are carried by one in five respondents in their purses. Dental floss is the most common item, but toothbrushes, breath strips and even tooth wipes were found. Almost none were in any

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type of protected, closed package. Toothbrushes were the item most likely to be carried in a plastic sandwich bag.

Religious items: 15 percent
Items of religious significance are carried in a modest number of purses. These take the form of rosaries, funeral cards, medals, crosses and even notes from Bible study classes. Most of these items were carried as reminders or tokens.

Weapons: 14 percent
Fourteen percent of women in this study carry items that could be considered weapons, and the knife is the weapon of choice. Several of these knives are more of the utility variety (Swiss Army), but, more often than not, these knives were carried for protection. This is interesting because a knife is an intimate method of defense. Close proximity is necessary in order to use a knife as a weapon. Perhaps a better form of protection designed for a woman's needs and for ready access in her purse would be useful. Other protection items, carried at much lower levels, included flashlights and pepper spray.

Personal technology: 13 percent
More than one in 10 women carries some form of personal technology in her purse. These items typically take two forms: electronic storage media and MP3 players. Innovation opportunities could include dust/dirt protection and crush-proof storage. Functionality of these products could be further leveraged to replace scrap paper and other information collection methods and help keep track of a woman's schedule. Only about one in six carries some type of time-management tool, yet for those who carry them, it's a very important item. This is fertile ground for innovation.

Keepsakes: 10 percent
Many women carry irreplaceable keepsakes and mementos in their purses. They perceive this as a safe place, yet purses are lost and stolen every day. When a purse is stolen, it is the personal keepsakes that are missed most.

Keepsakes are frequently damaged or destroyed and not accessed often for enjoyment. There could be innovation opportunity to help women showcase and enjoy their keepsakes in the purse or innovation to help women keep better track of their purses.

Cameras/accessories: 8 percent
Cameras and camera accessories are carried by only a handful of respondents. Digital options outpace disposable cameras by more than two to one. Given the number of photographs carried, this might suggest an opportunity for digital photo capture and display in a single device and device integration. |Q

special markets: kids

Small in stature, big in importance

By Valla Roth

They're a major market force. They're a top priority for marketers. But for researchers who want to study their opinions, tastes and preferences, kids and teens can be elusive. Here are recommendations for conducting meaningful, actionable research on this important and impressive group of consumers.

Don't let their diminutive statures fool you: there's nothing small about the younger generation as a market segment. There are 73 million individuals under the age of 18 in the United States alone, wielding a whopping $250 billion in direct spending power and influencing upward of $1 trillion more. And their influence starts remarkably early. Children as young as three years old express opinions that impact household purchases. Their first purchase is not far behind, with kids from four to seven years old buying their first item directly.

There is no question that marketers need to analyze, evaluate and understand this powerful segment. The question is how. Research with children can be complex and challenging, with special requirements and considerations. This article covers the important issues in conducting research with children and teens - a segment we'll collectively call kids.

Complex process

Purchasing by and for kids is often a complex process of interactions among children and their parents. The kids may request a particular product, and that request may be subject to various levels or types of parental control. Even teens with their own disposable income can be subject to the control or veto power of parents.

Therefore, in designing your research, you must therefore identify the relevant parties and their respective roles in the purchasing decisions. First you will need to understand the category purchasing dynamics: How much of the category is purchased directly by children? By the kid influencing the parent? By the parent buying for the kid? Consider also the brand's targeting and marketing strategy. Is it kid-driven? Focused on the parent as gatekeeper for the child? Addressing the entire family?

In cases where kids make their own purchases (such as snacks or magazines for teens) or have strong influence (such as toys for

Using research to understand kids and teens

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eight-year-olds) you should prioritize the kids' choices in your research. In many situations, children don't make the purchase but exert influence on their parents. In these cases, the degree of influence can be affected by the age of the child, family size, parenting style and other factors, so it can be critical to gauge the degree of influence along with how strongly the child will lobby for the product. The family dynamics of how effectively the child's opinions can influence purchases will be critical to the product's success, and the research needs to take this into account.

In other categories, parents make the purchasing decision with little or no input from the kids. This is especially true for younger kids, for more-expensive items and in categories where health is a key factor. Focusing on the parents' choices is most important here.

In evaluating the entire picture, many factors will come into play, such as the price point and the purchase cycle of the product, whether other influencers such as teachers or grandparents giving gifts may play a role, and the relative influence of children based on country and culture. For example, if you are studying a product in a culture where children generally have little influence on their parents' purchases, you will likely focus on the parents' response to your concept. In cultures where children's opinions carry more weight, you may focus more on the kids' points of view.

Table 1: Do You Interview the Child, the Parents or Both?

Situation		Interview	Examples
Kid purchaser	• Child decides and buys with no veto power from parent • Generally older tweens or teens	Kids only	• Candy, snacks, fast food, magazines, books for teens or tweens • Small collectibles • Cosmetics or hair accessories for older girls
Kid influencer	• Child has strong opinion and influences parent purchasing • Novel or unique products where parents can't predict kid acceptance	Kid, then parent from the same household (parent sees kid responses)	• Most kid foods, clothing, video games (assuming parent buys) • Toys • Novel or unique products where parents can't predict kid acceptance
Parent influencer	• Parent makes decision for kid consumption but there is risk of kid rejection • Generally younger kids	Parent, then kid from same household	•More "serious" items, such as kid meals or shampoos
Parent purchaser	• Parent makes decision for kid, without consultation • Parent makes decisions and kids not interested in exerting their influence	Parent only	• Not highly unique new products in known kid categories (e.g., new cereal) • Kid staples such as multivitamins, school supplies •All-family products such as packaged dinners, family games
Mixed model	• Unclear degree of kid influence • Uncertain purchase behaviors • Plan to market to both parent and child	Kids and parents from different households	• New categories • Categories with broad consumption and varying influence models

In emerging categories or early in brand development, it may not be clear whether kid-targeting or parent-targeting is optimal. In this case, it's best to develop a wide range of concepts and to interview parents and kids from separate households (the bottom section of the Table 1). From the data collected, targeting strategies will begin to emerge. For example, if a concept scores well among parents and only fair among kids, a gatekeeper strategy is suggested. If a concept is strong among kids and is just acceptable to parents, then targeting kids directly is indicated.

Many venues

There are many venues in which to interview children, including over the phone, in person and online. There are several advantages to online interviewing. Children are comfortable with the online environment; the current kid generation is the first one to grow up with this medium. Conducting research online is visual and engaging, with no interviewer bias. The Internet allows for interacting with the child in his or her natural environment: the home.

When interviewing online, children can be reached directly via kid panels or by way of their parents through their participation in research panels. Our firm reaches

Recommended Survey Durations (Minutes)		
Age	Ideal	Maximum
6-7 (children)	5	10
8-12 (tweens)	10	15
13-17 (teens)	10-15	20

children solely through an invitation to the parent. The parent knows what the survey is about and gives permission before turning it over to their child. For younger children, the parent may need to help them understand the directions, so having the parent nearby is very helpful. And as we discussed earlier, many times it's valuable to interview the parent as well.

Specific guidelines

There are specific guidelines to follow when interviewing children and teens, regardless of the interviewing venue, such as those published by ESOMAR (www.esomar.org). Our company is a member of this organization and strictly adheres to these guidelines.

For children under 14 years of age:

• You must obtain permission from the parent or responsible adult first, giving them sufficient information about the subject matter of the interview, along with any potentially sensitive issues. The identity of the adult should be noted, but written permission from the adult is typically not needed from the adult.

• The adult should be nearby during the interview but need not be in the same room.

• If the child is to test a product, the adult must be able to see it and try it if desired.

For children and young people under 17 years of age:

• For product testing, the researcher must be assured by the supplier that the product is safe to handle or consume.

• The researcher must make sure the child has no relevant allergies, and that using or consuming the product does not result in any illegal activity.

• Also, the researcher must take into account the maturity level of the child and the subjects appropriate for him or her. Topics that may frighten, worry or disturb the child must be avoided.

If the topic is valid but potentially sensitive to some respondents, a full explanation must be given in advance to the responsible adult, and steps should be taken to ensure that the child is not worried, confused or misled by the questions.

Keep in mind the differences

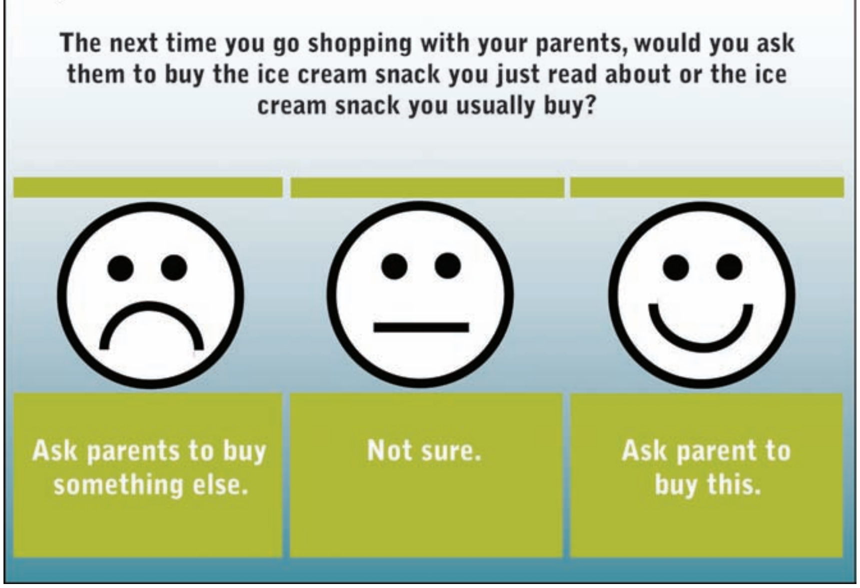
Kids are not miniature adults. Children are more concrete and literal thinkers, less articulate and more egocentric than adults. Therefore, an adult questionnaire shouldn't simply be modified for children. It's best to start over and to keep in mind the differences in how kids are able to respond to stimuli and make choices.

Young children (7 years old and under) tend to focus on one aspect of a stimulus, perhaps a very trivial one to an adult. For example, a young boy may love the color of a toy because it's the same color as his favorite sports team, yet he ignores the fact that it is remote-controlled and can maneuver around tight corners. These children tend to see the world as black or white, so survey questions need to be simple. Their reading level is not well developed, so they likely will need a parent to help them read any instructions and perhaps act as an interpreter when filling out the survey.

Tweens (8 to 12 years old) have better reading ability and can handle more verbal concepts. They can separate an idea or a product into its basic components, such as the taste and the texture of a food product. They are beginning to understand that not everything is black or white.

Teens (13 to 17 years old) have well-developed cognitive skills, similar to adults. They can use logic, reasoning and abstract thinking though not at the same maturity

Figure 1



level as adults.

We recommend interviewing children no younger than 6 years old. At 6 and above, children are in school, so they've learned to focus on activities and have at least a basic reading ability. Regardless of the age, child interviews need to be short to match their attention spans.

Below are some general tips in designing kid surveys (see chart for recommended survey durations):

• Give simple, clear instructions. Tell children that it's OK to ask a parent for help if they don't understand.

• For young kids, have all responses be mouse-driven rather than needing to be typed.

• Start with easy-to-answer questions. Consider a warm-up question for younger kids, one where the results aren't tabulated.

• Keep the survey very interactive and visual. Pattern a survey from a video game. Consider using sound as well as visuals such as voiceover instructions for younger kids.

• Check stimulus download times; kids are used to immediate reactions.

• Avoid matrix (grid) or constant sum questions.

• Give them positive feedback along the way and show a progress bar.

• If unsure, consult a teacher of that age group or pretest among a small group of kids of the target age.

About choices

Life is about choices - for children as well as adults. The type and the complexity of choices for children are, of course, different from those for adults. Choices are manifested in the ensuing behavior that occurs. For example, a child may choose a new cereal after seeing it on TV, and then ask his parent to buy it instead of his current favorite.

Because behavior is the bottom line, we believe in concentrating on the effects of the offerings, not the means. It's more important to measure the behavior than the attitude behind it, especially for children who may not be able to understand or articulate their attitudes or feelings. It's also important to measure the behavior alongside the alternative behaviors that could take place - in a choice context. Figure 1 shows an example of a choice-based behavioral question.

By providing the three visual choices, even younger children can understand and effectively answer the question, and differences between ideas can be found.

Figure 2

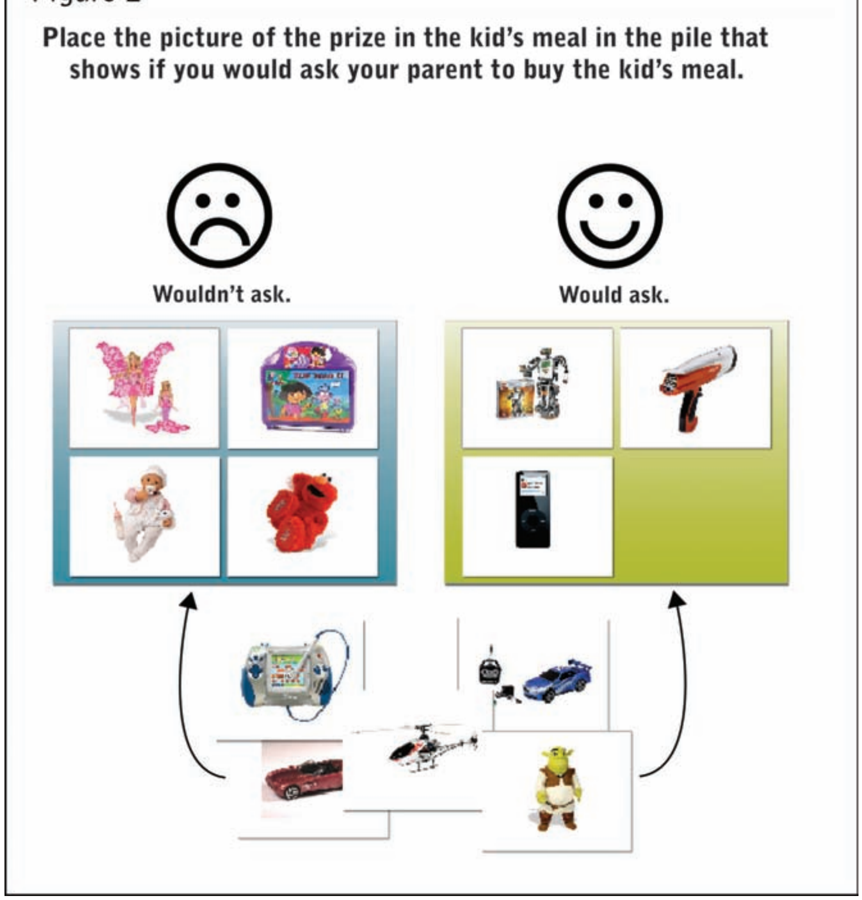


Figure 3

Figure 4

Figure 5

If children are responding to a number of simple stimuli (such as premiums that could go into a kid's meal), they could sort the pictures or drawings in a similar behaviorally-based manner, as shown in Figure 2.

There are times when rating scales are desired, especially for older kids and teens when evaluating product attributes. A choice-based approach is best, putting what is being evaluated into a meaningful context.

We have found that star scales work best – even across cultures and countries – because kids can universally respond to the notion of "more is better." When there are more than three scale points, kids can have trouble discerning differences in smiley faces. When using star scales, it's important to stack the stars in the answer responses for better understanding.

Figure 3 is an example of a star scale diagnostic question suitable for a Tween.

If it's important to discriminate between degrees of purchase interest, Figure 4 is an example of a star scale question that a teen could answer. Note that it is still portrayed as a choice-based question.

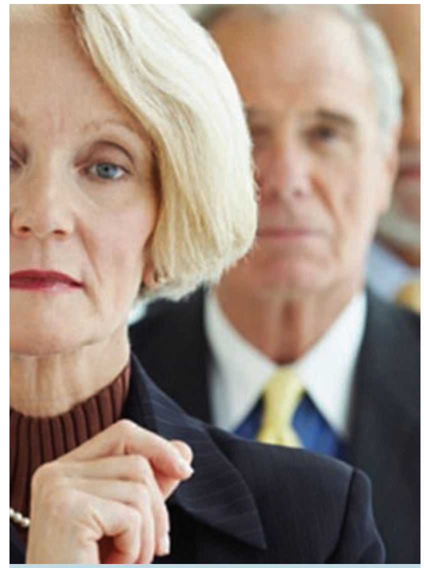
Finally, occasionally there are surveys that are largely attitudinal, not behavioral. These are not recommended for younger children and tweens because they usually can't articulate or even understand their attitudes or opinions. Teens are developing the cognitive ability to express their attitudes on subjects relevant to them. Figure 5 shows an example of an attitude question that may appear in a study among high school kids.

Tapping into the natural communities of kids and the adults around them – parents, teachers, grandparents and others – can help you identify the trends and related product opportunities. For example, you can analyze the content posted on kid-related message boards that are frequented by your targeted segments. By listening in and understanding the authentic and raw opinions of kids and their parents, you can generate ideas for further investigation.

Critical to the success

Researching the preferences, opinions and behaviors of children and teens can be critical to the success of your brand. Following these guidelines on appropriate techniques, questioning methodologies and protocols for kids will ensure that you gather relevant data and direction. In conducting research with kids, you should: follow appropriate parental involvement approaches; identify the appropriate purchase and influence segments; and conduct surveys using engaging and special markets: seniors

They're older so you need to be wiser



By Michael Hesser

The increasing median age of consumers in the U.S. is an often-discussed and frequently documented trend. The marketing-related implications of this change in the age profile of U.S. consumers will be significant and widespread, as evidenced by the following data points:

• The number of U.S. consumers aged 65 and over will increase from 35 million in 2000 to an estimated 71 million in 2030. The number of consumers over the age of 80 will more than double during the same time period.

• The number of adults aged 55 to 64 will increase by nearly 50 percent between 2000 and 2010, a rate of growth more than six times higher than that estimated for the remainder of the population; the number aged 65 to 74 will increase by nearly 20 percent during the same decade.

• Consumers over the age of 55 have a per capita income that is 25 percent higher than that of the general population.

• Consumers over the age of 55 own 77 percent of all financial assets in the U.S. and purchase nearly half of all luxury automobiles sold.

• Nearly half of all consumers over the age of 55 own a computer; 70 percent of them use the Internet regularly.

Companies that achieve success in this marketplace must recognize the complexity of the segment, the continuously shifting need sets of older consumers and the impact of their efforts to target this population on their ongoing delivery of products and services to other segments of consumers.

Issues and considerations for designing research with seniors

More specifically:

• Consumers aged 55 to 64 differ drastically from those aged 75 and above.

• A consumer aged 60 today will have very different needs when they turn 70.

• A company that successfully serves a younger segment cannot expect their product benefits, positioning strategies and/or brand identities to transfer equally to the older consumer, and vice versa.

The decision to target older consumers includes significant investments into understanding the relevant customer segmentation(s), diversified product requirements, positioning strategies and marketing messages.

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Vast and diverse
The total set of product and service categories that will be significantly impacted by the aging of the population is vast and diverse. As a means of demonstrating the challenges facing just a few example categories, two specific product/service segments are discussed in greater detail in the following sections.

Telecommunications
As the U.S. consumer population ages over the next 10 to 20 years, the composition of consumers' core need set for telecommunication products and services will transform dramatically.

At a very basic level, a new set of requirements will emerge - albeit gradually - for user-friendly products that accommodate diminished eye-sight, hearing and manual dexterity. More complex, however, will be the life stage factors such as reduced income, grown children with remote families and a shifted set of personal interests regarding information, travel and entertainment options that alter these consumers' interest in and need for products and services that were seen as critical just five to 10 years prior.

Wireless phones
The Baby Boomer generation played a significant role in the exponential growth of wireless telephone services over the past 20 years. Consumers between the ages of 35 and 55 not only represented the largest proportion of the population but also demonstrated a previously unseen appetite for new communication and entertainment technologies.

As this segment of the population enters into the senior age segments, however, their key requirements are likely to shift dramatically, including increased demand for services and handsets that represent a better fit with their physical capabilities and evolving lifestyles. The changing profile of the wireless user, therefore, holds significant implications for wireless carriers and handset manufacturers.

- In the year 2000, wireless penetration among consumers over the age of 65 was just 19 percent (6.7 million users). However, among those aged 55-64, penetration was 43 percent (10 million users).
- Assuming that most of the Baby Boomer users will maintain their wireless phones, the number of wireless users over the age of 65 will increase by more than 300 percent, to 22 million users, by the year 2010.
- The total proportion of wireless users, who are over the age of 65, just 8 percent in 2000, could increase to nearly 20 percent by 2010.

Web sites
Similar to the growth seen for wireless telephones, the drastic increases in Internet usage seen over the past 20 years can also be attributed in large part to the demand for these services among Baby Boomers. As these consumers reach 65 years of age and older, however, the current wave of detailed and complex Web site content may be run counter to the core requirements of this important group of Internet users. With the growth of alternative Web content access tools relatively flat over the past 10 years (aside from some wireless), the necessity falls to content providers to develop Web sites that accommodate the changing physical and lifestyle-related requirements of the older Internet user.

In 2001, 65 million adults aged 25 to 49 were regular users of the Internet. This population represented more than 65 percent of all consumers in this age group. Conversely, only 28 million adults over the age of 50 were regular Internet users in 2001, representing just 37 percent of all consumers in this age group.

Depending on the degree to which older adults maintain their use of the Internet past the age of 65, the total number of Internet users in this age group could more than double by 2010, to more than 50 million users.

Food and beverage services
Overall, the Baby Boomer generation

is very likely the healthiest 50+ generation in history, with previously unseen levels of awareness and concern for the pursuit of a vibrant lifestyle, for maintaining a healthy diet and for exploring options for slowing the aging process. Still, the changes that take place in the human body as a person reaches the age of 65 and beyond are largely unavoidable and have clear implications for companies serving the food and beverage needs of this segment.

As more and more consumers in the U.S. reach the age of 65 and beyond, the demand for tasty-yet-nutritious foods and beverages will increase dramatically. The need for specialized foods and nutrients will rise, especially for those with acute medical conditions and/or limited mobility.

With regard to individual wants and preferences, taste becomes an amplified issue for older adults, as specific flavors need to be up to 10 times stronger for these consumers than for the younger population. Appetites decline over time, perhaps due in part to diminished taste capabilities, but also as a result of health issues and physical capabilities (chewing, swallowing, etc.).

Given these issues, food and beverage providers must:

- recognize the financial resources of this segment and the value of established loyalty with older consumers over the next several decades;
- develop specialized products that target the specific needs and wants of individual senior consumer segments, particularly in terms of taste, nutritional value, freshness and so on; and
- consider seniors' limited capabilities and specialized needs in terms of shopping, traveling, standing in line, sitting, driving, etc., as means of accessing the products offered.

Challenges for researchers

Given the marketing-related issues noted, the challenges for researchers commissioned to assist in these efforts are as varied and as considerable as the population of older adults as a whole. Aside from recognizing the differences between various segments of seniors (e.g., 55-64-year-olds versus those 75+), we must also take the specialized needs and capabilities of these consumers into account at multiple stages of the research project cycle.

Project/sampling design

During the initial stages of research, researchers and their clients must coordinate to set goals. With regard to the senior population specifically, marketers and researchers must carefully questions such as:

- Which segment(s) of the 55+ population are relevant to the issues at hand?
- In addition to age, what segments exist in terms of financial status, residency, household composition and so on?
- In what geographies of the U.S. are these consumers located, and how might their needs and behaviors differ by geography?
- Are there issues of housing that need to be considered? For example,

the need to reach seniors who live in managed housing facilities or communities, etc.

Only through the documentation of specific and actionable goals for the research can considerations be made for an appropriate set of tools for gathering the necessary information.

As with any research, the ideal methodology is a function of the study's objectives, not vice versa.

Data collection

In some ways, senior consumers are an attractive target for traditional research methods such as telephone surveys, based on slightly higher levels of interest and participation. However, changes in lifestyle, physical capabilities and technology adoption that take place after the age of 55 hold important implications for the selection of an appropriate data collection method.

In particular, the following factors should be taken into account:

• Does the target audience have access to and/or the physical means of completing surveys delivered through traditional methods such as the telephone or mail? Do they have individual telephones or are they housed in a senior care facility or community? Does their age status call into question issues of hearing or eyesight to a degree that would impact survey completion/participation rates?

• What opportunities do the respondents have for participating in qualitative studies? Are they able to travel to a facility independently? Is group transportation an option? Would on-site discussions (at their home or community, for example) be more appropriate?

• What is the level of Internet access among the targeted consumers, and how does that level of penetration relate to the nature/topic/goals of the study? How do the project's needs for projectability relate to the proportion of Internet users in the population? What lists or databases are available for reaching the target population through an online survey?

Questionnaire design

Regardless of the data collection method utilized, significant attention must be given to the structure and content of the questionnaire/discussion guide utilized to capture the information.

• When designing the questionnaire, what are the capabilities and limitations of the audience for utilizing specific scales, question structures, visual aids and so on? Is it necessary to include varying scale anchors (1-5, 1-7, 1-10, etc.) or can a single set of anchors be used to simplify the instrument? Do the visual aids being considered for the study effectively communicate the desired messages/images? Are they easy to see and easy to read?

Specialized discipline

Primary research among older adults is a specialized discipline calling for a specific set of tools, techniques and considerations. Flexibility is the key, as consumers aged 55 and older have a host of differing needs and capabilities that must be accommodated. By tailoring your research approach to the respondents' life stages, you will ensure a quality data-gathering experience for your client and the consumers in their target markets. | Q

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special markets: employees

Internal groups can bring internal fears

By Peter Goudge

Editor's note: This article is adapted from a chapter in Peter Goudge's book Employee Research: How to Increase Employee Involvement Through Consultation *(Kogan Page, 2006). Goudge is a founder member and former chairman of the employee research group within the U.K.-based Market Research Society.*

A look at some of the issues surrounding qualitative research among employees

There are many considerations that have to be borne in mind when conducting qualitative research among employees, over and above those that might be observed in the conduct of consumer research. For example, you need to consider the composition of respondents in a group discussion so as to avoid, say, any inhibitions arising from the presence of people from different levels in the organization's hierarchy. Further, concerns about the confidentiality of any opinions expressed have to be recognized and dealt with.

Employees, even if they are not shareholders in an organization, can have substantial personal investment in it. Indeed, setting aside other monetary benefits linked to the organization (such as pensions, bonuses, loans for property or vehicles) the cumulative value of a career, including the potential for further advancement, could be perceived as being in jeopardy if they are deemed to express views which are not acceptable to others.

Someone who is attending a focus group as a customer of an organization is risking little in expressing a critical opinion of that organization. Indeed, one of the virtues of market research is that it helps organizations identify where they need to make corrections and improve what they offer to existing and potential customers. By contrast, consider the actions organizations can easily take against one of their own who has the courage to point out shortcomings in their practices. A National Whistleblower Center survey (as reported on its Web site) of 200 random whistleblower reports made to the Washington, D.C.-based watchdog group during 2002 found 49.5 percent reported that they were fired for blowing the whistle. And these were not trivial cases since over half of these respondents said they had reported fraud or criminal practices.

It is therefore critical that employees are reassured of the confidentiality of anything they may say in a focus group or depth interview. This of course is particularly relevant when, as is common, a moderator or interviewer wishes to record groups (on tape or disk) for the purposes of analysis later. Few researchers are blessed with

perfect recall, so the use of recordings permits an exhaustive analysis, ensuring that all views are accorded due weight.

That said, it is imperative that permission to record is requested in advance of the interview or discussion taking place, and if an employee declines then it will be necessary for the moderator to make notes of the discussion or have a note-taker present. While this is less satisfactory from the researcher's point of view, it should not compromise the integrity and confidentiality of the research process.

Concerns about confidentiality also make it highly unlikely that employee groups will be recorded on visual rather than audio media, as is often done in consumer research. The use of video in consumer research is a powerful means of demonstrating to decision makers how customers feel about an issue, and it is extremely unlikely that any one respondent would be known to those executives being shown the video. In contrast, any employee recorded on video during a research project would be readily identifiable and any guarantees of anonymity that they may have received would quickly be rendered worthless. For the same reason the practice of allowing observers to attend consumer groups cannot be replicated within an employee study.

Have implications

The composition of a group discussion may also have implications for the way in which certain topics are covered in the research. When individuals from, say, different backgrounds, with varying political (both internal and party-political) allegiances, are brought together it is possible that some discussions (for example, relating to equal opportunities) could get heated, again with the dangers of greater fallout than is ever likely from a similar-sized gathering of respondents drawn from the general public. The key here lies not in the avoidance of such issues but in the anticipation of those that might excite. The necessary preparations can then be made, not least with the use of a skilled moderator.

Sensitivity over the topics to be discussed may also be pertinent in organizations where large numbers of the workforce are represented by trade unions. It represents good practice where unions are involved to inform them of plans for any research and to gain their commitment to the process. Apart from anything else, this makes it possible to allay any misconceptions that could otherwise arise over whether the discussions might cut across more formal negotiations. In some respects the flexibility and free-flowing nature of any group discussions (as opposed to the certainty of a structured questionnaire) make it as important to engage unions in the qualitative research process as it is with a quantitative study.

Since group discussions can easily last for an hour-and-a-half, and interviews take up to an hour, it is important to consider whether they are scheduled to take place during or outside the working day. While it is standard practice for consumer groups to take place during the evening, this reflects the fact that few people would be able or prepared to take time off work to participate in such research. With employees, the situation is virtually reversed in that they are less likely to want to spend time of their own discussing work-related topics.

The point here is further complicated by the difficulties of thanking people for their participation in the same way as is traditional with consumer research: by means of a cash gift, vouchers or goods. A practical dimension to this issue is that tax authorities could regard these payments as taxable (as either pay or a benefit in kind). In addition, there is always a philosophical preference for having participants who are there by virtue of an interest in the subject matter rather than those who are attending as a means of increasing their income.

A solution that meets this need while avoiding the complications of involving payroll departments and tax authorities is to hold the research sessions over extended lunch breaks (and possibly outside work hours, provided the occasion is presented as an attractive event in its own right). It will be attractive if the subject matter under discussion is of interest, and potential respondents are made to feel they will be able to make a genuine contribution through their participation. It should also be enjoyable; the location is crucial to this and the provision of food and refreshments will also help.

If the research is conducted after the working day there are generally more possibilities for holding the sessions off-site. It has to be recognized that those with families or burdened with long working hours may be reluctant to become involved at this time. Where off-site sessions can be arranged, participants are more likely to arrive free of some of the baggage attached to their job and be more open-minded on some of the issues to be discussed.

The optimal timing will vary according to the place of work. In large cities, employees will arrive at work from all points of the compass, having commuted significant distances. To facilitate their return home, the timing of any research activity should follow closely on the end of the normal working day. Elsewhere in the country, it may be appropriate to schedule the event for later to allow employees, should they wish, to go home prior to reconvening at a central point for the research.

The benefits of the above approach apply particularly to group discussions, involving as they do a number of participants. The reasons for conducting interviews off-site are less compelling. Indeed, it is often the case that more senior people are interviewed alone, and the demands on their time are such that it makes practical sense to talk to them in their offices.

There will occasionally be compelling logistical reasons for holding group discussions in the workplace. Even so attention needs to be given to the location of the discussions. For instance, there may be nervousness on the part of some employees if the group is held in a meeting room that is located in an area where their participation would be noted by other, possibly more senior, colleagues.

Report back

The need to eventually report back the results of the research, plus any accompanying actions, to the participating employees is a message that bears repetition. Nowhere is this more important than in qualitative research. By definition a small proportion of the workforce will have participated at length in an exercise where they have been invited to contribute to the debate on issues of significance to the organization. The participation alone can be a very powerful form of motivation, as the individuals concerned will derive a strong sense of involvement in the decision-making process. However, this can easily backfire if the participants are left without any indication as to what will happen following the research. The perceived return on their investment of time and effort will quickly become a loss if they are not informed how matters will be taken forward. Even a decision to take a contrary course of action to that recommended in the research can be accepted if it is accompanied by a rationale. Complete silence on any decision-making is likely to result in reluctance on the part of those respondents to participate in future activities.

In certain instances the nature of the subject matter and the implications of the decisions will be such that all employees (and possibly external audiences) should be advised simultaneously. Even so, it should be possible to explain this to those who took part, and their contribution should certainly be recognized when the announcement is finally made. Apart from demonstrating an appreciation of these contributions, this can also create a positive impression among the workforce.

The fact that employees will have taken part in the research on the basis that their identities are not revealed to the employer inevitably requires that their contributions are recognized in a general way, such as through a communication to all employees. A more direct and targeted thank-you message can only be delivered by the external moderator, who can arrange for a personalized communication without the recipients ever being identified by those working for the organization. | Q

Your brand can become their brand

By Ted Mininni

Tweens. Ranging in age from 8 to 12, they're not children anymore. But they're not quite teenagers. Marketers are increasingly focusing on this demographic and for good reason. Between their own growing purchasing power and the influence they exert on family purchases, tweens account for a staggering $240+ billion in spending. What's more, tweens are very brand-conscious, highly impressionable and use favorite brands to define themselves. Tweens' favorite category purchases include food, music, fashion, entertainment, toys and games.

Reaching tweens isn't hard; this demographic responds favorably to traditional media, including TV, radio, and age-appropriate magazines. However, the Internet and cell phones are rapidly becoming tweens' favorite communications platforms, due to their highly interactive nature. Reaching tweens with marketing messages isn't the hard part, but selling them is another matter.

Interesting demographic

Tweens present an interesting demographic. They have an amazing ability to multitask. They can engage in a conversation, have one eye on the TV or their ears plugged into their favorite tunes on the iPod as they instant-message friends on the Internet.

Tips on marketing to tweens

Since they're growing up in a media-rich environment, tweens are adept at using more features on the Internet and cell phones than adults are. They love electronic communications since they are highly interactive and offer a quick, easy way to keep in touch with their friends. Marketers' Web sites that are interactive and allow tweens to have control over their own experiences, giving them maximum enjoyment and a sense of freedom, are absolute favorites. Ditto with mobile phone marketing.

Marketing campaigns that partner with popular tween Web sites, or choose to market on mobile phones will do well if they:

• Offer interactive games or contests since tweens love to participate. The element of fantasy in games is popular with tweens.

• Post silly humor or nonsensical jokes that no one is supposed to get; tweens enjoy sharing these with their friends. Promoting fun with humor is key in tween marketing campaigns.

• Tie in with pop cult characters whose core values tweens identify

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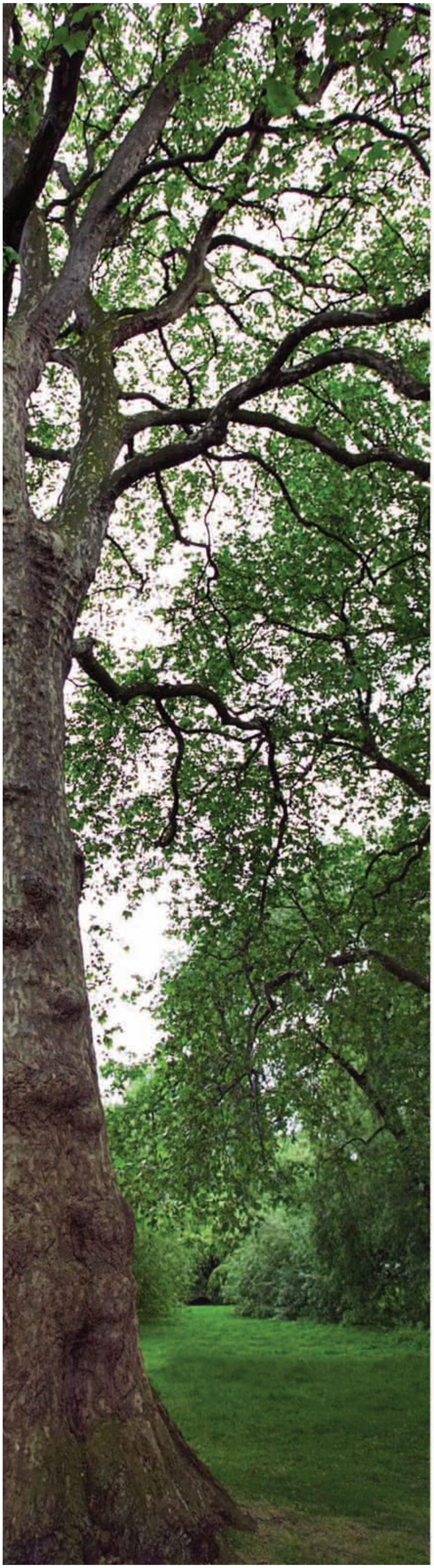

with. For example, Harry Potter, Spiderman and specific Nickelodeon properties.

Brands must be perceived as teen-oriented, not child-oriented. Feeling grown up, being taken seriously and not talked down to is important to tweens.

Honesty and authenticity are also very important; kids can smell phoniness a mile off. Turn tweens off once and marketers have lost them for good. According to researcher Millward Brown Optimor, there are six core values tweens respond and aspire to: fantasy, mastery, love, fear, stability and humor. Hence, tweens' love of brands like Harry Potter and *American Idol*, myTego, Hasbro's Tiger Electronics, American Girl, and so on. These brands embody some, if not all, of tweens' core values.

Tweens love to go online at www.mytego.com and customize the skins, or covers, for their mobile handhelds. IPods, Nintendo units and cell phones all become tween-stamped in a matter of moments. Tweens create custom-designed skins that go on and come off easily and see those designs being created in real time. They basically "brand" and customize their electronics very easily with myTego. This enables them to give free reign to fantasy, mastery and humor, and implement symbols of these values into their designs, as well as elements that signify love and fear for them, if they choose.

Hasbro's Tiger Electronics is a lifestyle brand exclusively designed for the tween set. The brand offers tweens TV plug-in and handheld and computer games. CHATNOW communicators mimic cell phones, allowing tweens to chat or text their friends within a two-mile radius. The device even has a built-in digital camera. Another handheld, the Massively MiniMedia Player allows tweens to store almost two hours of digital music, up to one hour or video and up to 1,200 photos.

Tiger Electronics' new music and video players, like the I-DOG, are designed to plug into tweens' music players and produce big sound through their built-in speakers or the kids' own headphones. I-DOG even grooves to music with movement and flashing LED lights that change color. All of these products appeal to tweens on many levels; they're tween versions of very adult kinds of electronics. They appeal to top tween values that they and their friends share as they use these products, such as mastery and fantasy. The concept of customization of product and brand is a big factor here too: Tweens can shape Tiger Electronics products and make them their own. What's not to love about that?

Complete pushback

Hard-sell techniques are not appreciated by tweens. In fact, that tack will result in a complete pushback. Using the tactics we've demonstrated will elicit favorable responses from tweens, and they themselves will then market to their circle of friends via word of mouth. Whatever we choose to call it – word of mouth, viral or buzz marketing – it's a hallmark of this demographic.

Whether it's at school, at sporting events or at other venues where tweens spend time, on the Internet or on their cell phones, this demographic group will make or break fads, trends, brands and preferences. When group members endorse brands, tweens rush to embrace them. Community marketing is increasingly used to brand-message tweens: local malls, movie theaters, sporting and entertainment venues are favorites to reach them.

Love to experiment

According to industry statistics, over 60 percent of tweens find out about hot new brands or products from their friends, inside and outside of school. Many marketers have turned to school-oriented brand messaging within the context of school events and programs to reach tweens. Tweens love to experiment and try new things. New fads, trends and ideas that meet with peer approval shape their attitudes and gain acceptance. Be prepared to see these accepted trends or ideas become shaped in a manner tweens can make their own.

As stated earlier, tweens respond very favorably to being able to have control over, or being able to create, their own experiences. Mass personalization enables tweens to take brands and truly make them their own. Business models that cater to mass personalization are a hit with tweens, including myTego, American Girl and Build-A-Bear.

By specifically gearing brands for them in a relevant and authentic manner, and marketing them as "just for you," companies find acceptance for their products with tweens. When companies acknowledge who tweens are, respect their intelligence, wants and needs, tweens will return the favor by becoming true brand adherents.

Let them define

Remember: the key to success when marketing to tweens is to let them define what their brand experiences will be, rather than trying to deliver the experiences as companies think they should be. This generation of tweens has learned how to create their own experiences in their online and offline lives, and they expect to be able to personalize their brands as well.

Letting tweens adopt brands as they wish and make them an integral part of their lives turns them into brand ambassadors. Tweens will then sell these brands to their friends via word of mouth. And that is the most desirable kind of marketing for any company trying to reach this active, multitasking, totally connected demographic. | Q

ethnographic research

What does the term 'ethnography' mean to you?

By H. Grace Fuller

I am confused by all the names used today for the anthropology- and ethnography-related methodologies in marketing research, and I've worked for over 20 years as an applied anthropologist and qualitative research consultant in marketing research. The words and names used for these methods seem longer than Santa's list: ethno-interview, shop-along, embedded research, urban ethnography, guerrilla ethnography, experiential research, immersive experience, observational research.

I knew I was really confused last year when I read an article that made a distinction between "immersion" and "immersive." It sounded to me like parsing bits from bytes. I have a passion for ethnographic work in marketing research, but it's not always the right tool for the job.

Once upon a time, when ethnographic-based research methods were first folded into marketing research, the terms used for this method typically named the place where an encounter between researcher and respondent-informant occurred - names like "in-homes" and "shop-alongs." Words like anthropology and ethnography weren't well known among most marketers. Now that ethnography has become a hot tool and is fairly common in marketing, the method and applied theory are being spread thin. This article addresses these issues: What do all the names for ethnographic work mean? What is the impact of using revisions of anthropological and ethnographic methods?

Researchers use too many terms to define the act of watching consumers live their lives

Simple definition

As a classically-trained anthropologist I was taught a simple, encompassing definition of anthropology: the study of humankind. These four words were broad enough to include physical anthropology, such as in forensics; archaeology, in which people and cultures in the past are studied through the things they left behind; and cultural anthropology.

Cultural anthropology, the study of peoples' life-ways and systems, is the area that most marketing researchers are using today. The method of gathering data to describe a culture or way of life is the anthropological sub-discipline called ethnography. I believe this term is used more frequently among marketing researchers because anthropology can sound esoteric. Also, those not trained in the discipline of anthropology may

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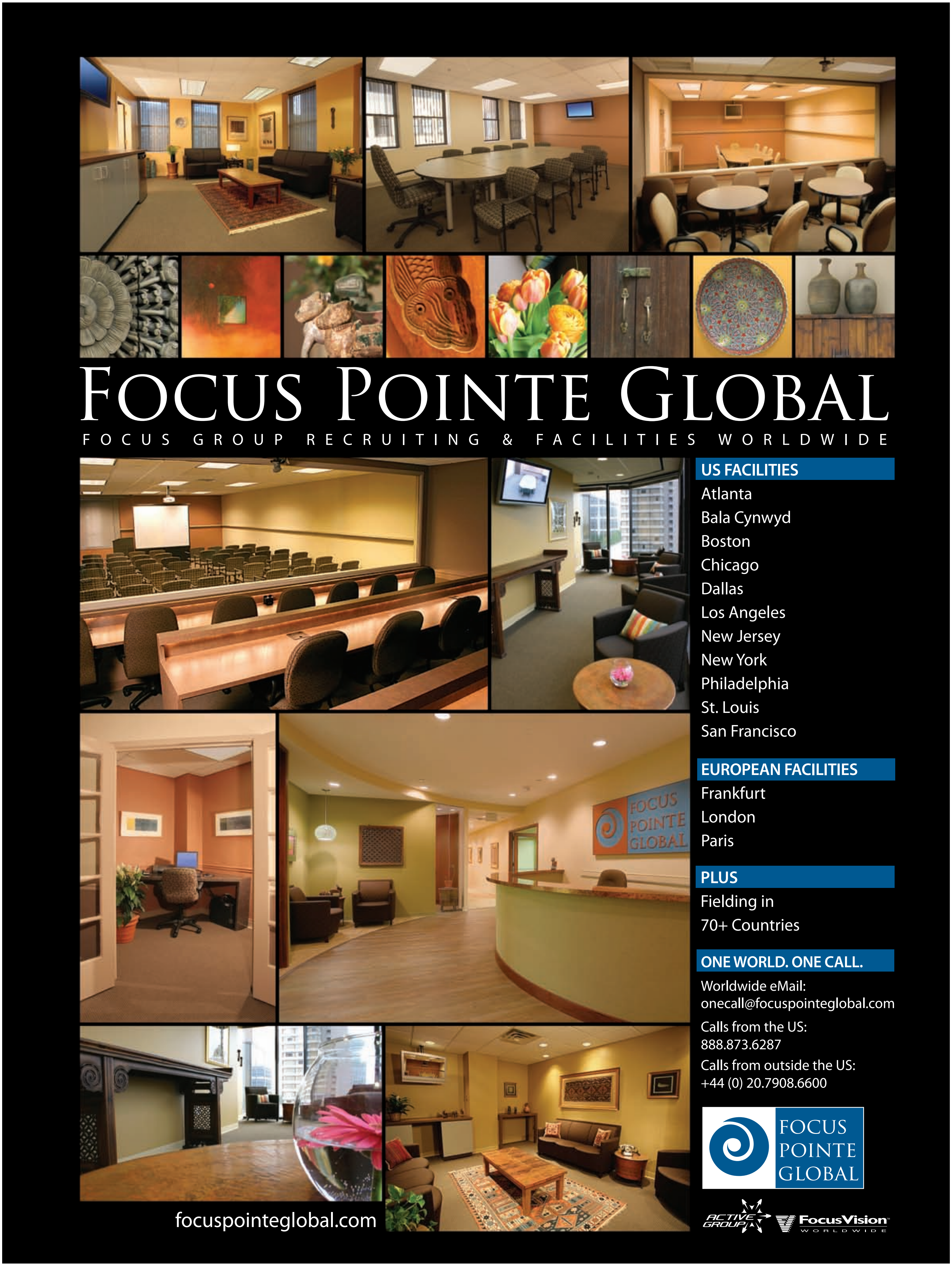
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feel more comfortable saying they do ethnography since it's more a method and can seem less an academic discipline. In this article I will often use both terms interchangeably.

In quantitative and facility-based research we have referred to the people we research as respondents. We, the researchers, asked them something and they answered or responded. Anthropologists and ethnographers have described the people under study as informants. All of their verbal comments plus other actions - unspoken behavior, how they create and interact with the space around them - inform us about what their worlds are like.

Where the lines are drawn

Even among academic experts in these fields, it's not that clear where the lines are drawn in the study of human behavior. In fact, the British refer to what American academics call cultural anthropology as social anthropology. So, one answer for the plethora of names is that there's a history of using different labels for the many ways to conduct the fine art and science of studying ourselves.

In traditional cultural anthropology, and its sub-discipline, ethnography, a lot of time is spent living with a defined group of people, observing what they do and fitting it all into a system of behaviors that makes sense to the people living in the culture or society. It involves seeking out a holistic view of the culture.

In classic academic studies this has meant spending at least a full year with informants so that researchers can observe and understand behaviors through all seasons. For example, if a marketing ethnographer from outer space, one who specializes in Earth shopping patterns, was in the field in the U.S. from January 15 to November 15, she still wouldn't fully understand U.S. shopping behaviors. She would have missed the Christmas holiday shopping frenzy and Black Friday.

In the reality of applied research in our market-based society, we researchers have to deal with constraints such as time and budgets. Our paying clients cannot afford to send us to live in the field for a year, and I'm guessing most of us wouldn't want to - well, maybe if it was Hawaii.

In addition to resource constraints, research buyers and clients are growing more comfortable with coming from behind one-way mirrors and mingling with their customers and constituents. They want to go onto respondents' turf to understand them on a deeper level. This is laudable.

To save money and time, and to put the client on-site, too often the result is an ethnographic study that dissolves into a parade of researchers/marketers going through a respondent's home in about two hours, with much of the data gathered by someone who is inadequately trained or inexperienced to do the work. Maren Elwood, of On-Site Research Associates, says, "This is the 'lights, camera, action phenomenon' because consumers end up acting for the camera instead of acting like they normally do." Her firm uses what it calls the "Hand Cam," a small camera that takes both stills and video, but looks like a still camera so consumers tend to forget they are being filmed. The cameras use infrared light so researchers don't have to use artificial lights during interviews.

It's hard for many marketers and researchers, who are active, busy people, both professionally and personally, to simply be in informants' spaces and absorb, to allow informants to take center stage while the researcher becomes the audience.

Ava Lindberg, president of Sun Research and a classically-trained anthropologist, tells of an experience she had with a client-observer who accompanied her on a home visit with a female informant. The research team had spent enough time with the informant that her behavior had returned to normalcy. Lindberg and her client were shadowing her as she went about her activities. "The informant was doing at least three different things - watching *America's Next Top Model*, doing her nails and carefully checking out reactions to photos she had recently put on her MySpace site – when the client asked, 'So…what would you typically be doing right now?' The respondent stopped everything, sat back, and intellectually explained her 'usual' activities, which bore no relationship to the current behaviors we had been observing," Lindberg says.

In the unfamiliar world of qualitative interviewing and ethnography, an untrained, inexperienced person usually resorts to interviewing with a highly structured questionnaire. This is not good ethnography.

Some of these methods have evolved to something that might be called ethnography-like work. Professionals who understand that research conducted in these ways is not true anthropology or ethnography often create a new name for the method used. This is another reason there are a lot of names.

There's at least one more reason for multiple names: More people are doing ethnographic-like work so a need has arisen among researchers and research firms to distinguish themselves one from another. In other words, more names are created for branding purposes.

Impact of revisions

The second topic - the impact of using revisions of anthropological and ethnographic methods - addresses the more important issue of whether anthropology-like and ethnography-like work is a service to research buyers and the marketing research profession.

When field researchers are on-site and observe appropriately (that is, being with informants who have become comfortable with what's going on and return to natural behaviors), trained researchers can get really good data and can get different kinds of data than what is gathered in focus groups. Sometimes respondents forget or are unaware of everything they do. When conducting ethnography on-site, we researchers can see for ourselves which products informants have in their homes, how they prepare their meals, what they hold of value and put in a place of honor.

Lindberg uses the terms "authentic anthropology" and "authentic ethnography" to distinguish her work because she feels it is more connected to the origins of the disciplines and to the holistic study of culture. She spoke to me about how she spends extended periods of time with her informants observing and often engaging in activities alongside them, doing what they are doing.

Elwood maintains that stranger-visitor activities destroy the normal, everyday activities researchers are there to observe. "We don't go in with video crews because people just perform for the camera," she says. Elwood and her team have also developed a way around short, one-time-only ethnographic visits by forming a longitudinal ethnographic panel. Over time informants in her studies have become familiar with her and her team members so that their presence in the homes have become natural, a part of the informants' everyday lives.

Richer data

Many current methods of ethnography-like research are missing opportunities to gather more and richer data. A one- or two-hour interview conducted in a home involves all the trouble of ethnography without discovering insights that could be gained when time is spent exploring how people live.

Not only is value missed, but research costs are increased. Ethnography and ethnographic-like interviews are expensive. They involve increased recruitment costs, expense for teams to rent cars, extra time driving to informant locations, plus paying extra high co-op fees for what is being called an ethnographic interview in the home.

Lastly, ethnography is too often bought and sold as the research method of choice on the grounds that focus groups don't provide reliable data. Respondents are said to lie in focus groups about what they do and how they use products in their lives. I hold that this potential research error can occur with almost all research conducted with human beings - both in qualitative and quantitative research.

Taking enough time

To do true ethnographic work we have to do more than follow respondents around in their homes with cameras and a clipboard. It's about taking enough time to be with informants to observe natural behaviors. The ethnographic process works best when researchers take advantage of our informants' hospitality and willingness to let us into their homes to see - or better, to experience - how they live.

No matter what names are used for ethno-like methods – whether they involve bringing in a large staff team with a video crew and lights; or using inexperienced interviewers because it may seem to save time and money; or conducting a one-hour interview in a home setting and calling it ethnography – these approaches are neither real ethnography nor are they the best, most resource-efficient methods of interviewing.

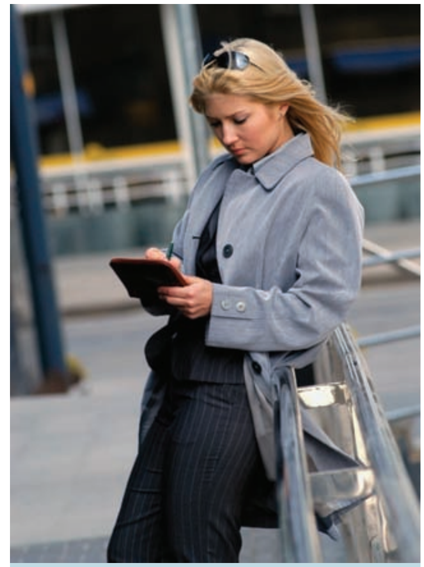
It's as if the real strengths of qualitative research, and the fact that there's more than one way to solve research problems, have been forgotten. If using ethnographic methodologies is the best way to serve research buyers and their companies, then it's important to do it right. For informants to act normally and give us true ethnographic data, they have to have time to become accustomed to researchers in their homes and lives. And sometimes this can mean that the research field team simply takes time to sit with them for an hour or two watching television, if that's what the informants typically do.

If ethnographic tools are not used right, or if gathering data for a specific project can be done better with other qualitative tools, then professional qualitative research consultants should choose other tools.

True anthropology means having the patience to let our informants' lives unfold in front of us. This is the true, the authentic, the magic of anthropological and ethnographic research. If researchers aren't willing to do that then let's take the interviews back to the facility and save our clients' time and money. | Q

ethnographic research

Taking research on the road



By Debbie Peternana and Kim Harrison

Tips for making your ethnographic-style interviews go more smoothly

Each type of ethnographic research study requires different preparation and processes. Whether you are conducting in-home interviews, party groups, in-office interviews, shop-alongs or dinner groups, often the mistake is made of trying to do them all the same way.

Recruiting for ethnographic studies brings its own special set of procedures and problems. The chances of miscommunication during recruiting are extremely high with ethnographies due to the number of people involved: phone recruiters, another person doing the follow-up, another calling with directions and a reminder, and the person actually conducting the interview. All of them usually possess different levels of experience.

Just as a kickoff call with a client at the start of a project is valuable so is a kickoff meeting with the people who will be doing the phone recruitment, follow-up and actual in-home interviews. Make an internal checklist and train them to what to ask and how to assess what they are hearing the respondent say or not say. It may take an additional hour, but it will be worth it if an interviewer finds him/herself with a respondent who has nothing to say once they are in their home.

Here are a few concerns your potential respondents may have during the call. Add these to your kickoff meeting with the interviewers so that they know what they may be asked.

• Should I let these people in my home?

• How many interviewers will be in the home?

• When will I be paid? How do I know you will pay me?

• Will this interview be taped by a videographer? What is that tape used for?

The recruiters, as we know, have a difficult job. They must find qualified respondents who are excited about participating and also build trust with respondents. To further build trust, consider having the moderator call the respondent the week of the interview to introduce themselves. This can go a long way toward making the respondent feel much more comfortable!

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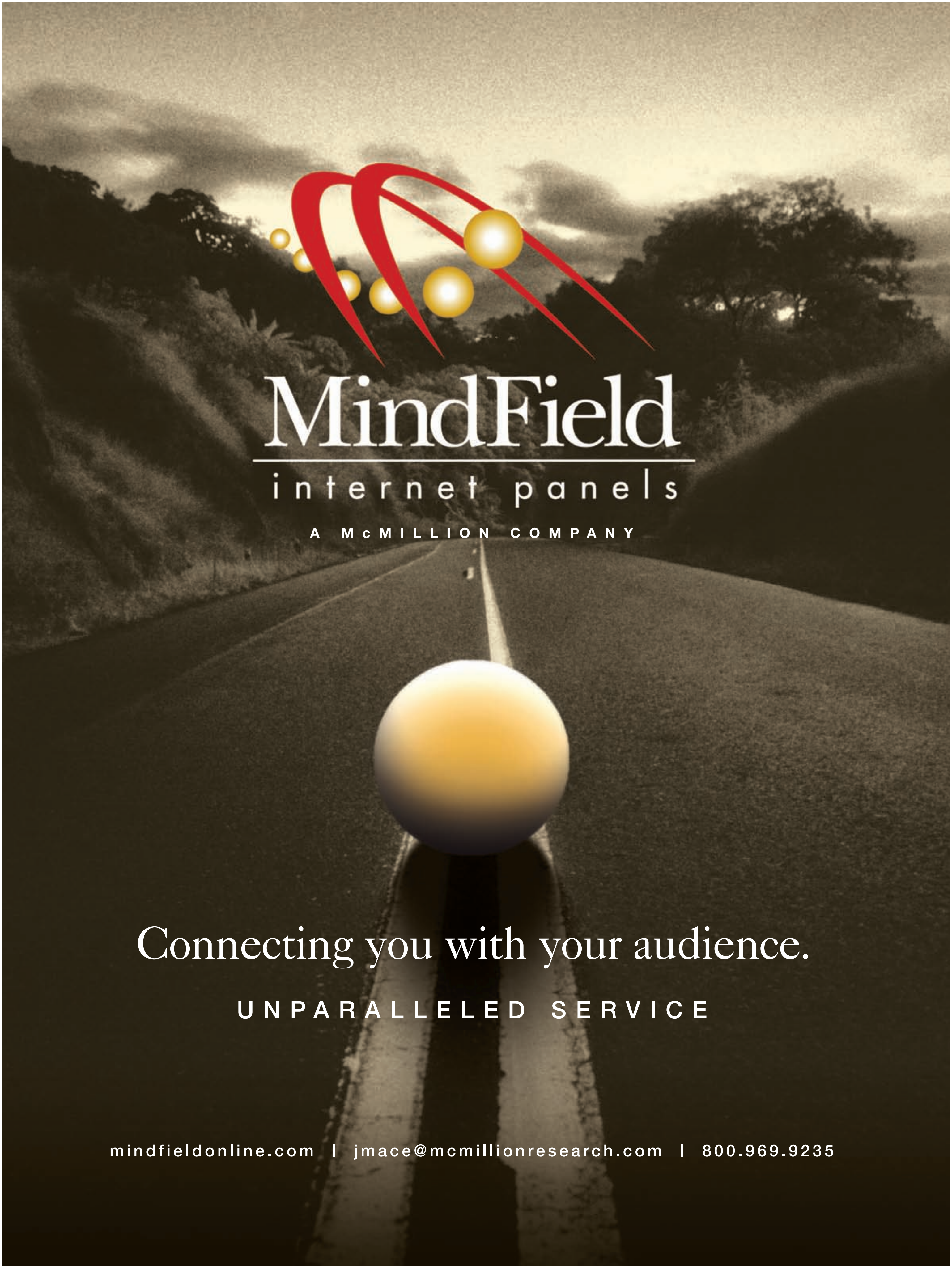
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In-home interviews

The amount of information derived from in-home interviews is only as good as the respondent recruited to do them. This is where quality means everything. What are the challenges to in-home interviews and how do we overcome them? In speaking to fellow researchers and to clients, we have received valuable information on how to handle the challenges associated with conducting this type of interview.

In general, prior to starting the recruiting, review the kickoff call notes and make sure the interviewers are clear on how they are expected to work with the database or list (if applicable) and how the client defines a "good" respondent. Also consider having quotas and a list of harder-to-get "like to haves."

Challenge: Getting respondents who are not just qualified but also excited to participate.

Solution: Articulation questions are key! Include questions in the screener that help to determine how articulate the respondent is.

Challenge: During the screener, too much information comes at the respondent at one time.

Solution: Put important points in the beginning of the screener and have the recruiter include them at the end of the screener in summary. Include important points in the confirmation e-mail in bullet-point fashion. Request a confirmation that the e-mail was received.

Challenge: Sometimes all information is not covered in the screener and follow-up: details, dates, times, expectations, incentives, etc.

Solution: Have someone review the confirmation e-mail to insure there is nothing missing.

Challenge: Making sure the respondent doesn't feel ambushed by the number of people who arrive at their house.

Solution: Let the respondent know how many people will be attending the interview, to keep that environment of trust. Don't send 10 people when two are expected.

Challenge: Keeping the respondent comfortable with having strangers in their house.

Solution: Let the respondent know if the interviewer/moderator will be going into any personal spaces such as bedrooms or closets. Also tell them what they should leave as-is, in terms of cleaning, etc. Some research may be about the space as it is and not after it has been cleaned!

A happy moderator is also important. Consider the following:

- Travel distances of 20 miles (30-40 minutes) work well. You don't want to have your moderator running all over town!
- When doing city and rural interviews, consider doing city one day and rural the next.
- While respondents may be hesitant to invest over two hours of their time, do not misrepresent time commitment. The moderator will have an impatient respondent on their hands!
- Double-confirm all contact information and addresses. There is nothing worse then sending a moderator to an interview and arriving at the wrong house.

Party/friend groups

Challenge: The host respondent assists with the recruitment.

Solution: Make sure your hostess knows the details, such as how many friends should be invited, etc.

Challenge: Party groups can be longer than other types of in-home interviews and can end up being less structured.

Solutions: Ask the hostess what will motivate the guests. Serve food and provide an incentive for the best homework. Play a creative game. If alcohol is served, provide a ride home whenever possible or make sure there is a plan to safely get the guests home. If parents will be bringing young children, a babysitter can entertain while the parents share valuable opinions.

In-office interviews

The biggest challenge you may find with workplace or in-office interviews is permission to conduct the interviews in the office and the use of video equipment. In this day and age, some offices simply will not allow a videographer to film the interview or interviews. Ask if you can take pictures instead! Many times, smaller offices (less than 50 employees) will allow you to do interviews and film.

This is where building rapport and trust will come in handy, as you may be required to speak to a manager in order to get permission to conduct the interviews. Make sure the person who is requesting permission comes across as credible and professional and has been trained on how to request clearance for in-office interviews. If need be you could offer an incentive to the gatekeeper, either in the form of cash, lunch for the office or a donation.

Having the moderator call can also alleviate any concerns and build trust. Be prepared to send over information about what the company can expect and explain that the mentioning of proprietary information can be avoided if required. In most cases managers or gatekeepers are just nervous about how it will affect other workers. There may also be concern that proprietary information will be provided and that they may get in trouble.

Challenge: Company managers or gatekeepers may worry that the length of the interview and the timing of it could disrupt productivity.

Solution: Keep the interview to one hour. If two hours are necessary you may consider one hour in the office and the second during lunch. Morning interviews work well also but steer clear of doing interviews at the end of the day. People are trying to wrap up and go home and you may not have their full attention.

Challenge: The phrase "research session" may have negative connotations for respondents.

Solution: Use the term "appointment" instead.

Challenge: Co-workers get involved and the moderator has trouble gaining control.

Solution: If a client would like to speak to the primary respondent first, and then speak to a few co-workers, have the moderator call the primary before recruitment of the co-workers.

Challenge: Your crew is turned away when you arrive. Respondents don't remember or are too busy.

Solution: Make sure a confirmation e-mail is sent summarizing all expectations and that participation rules are negotiated ahead of time. Get it signed and have it with you so that you can present it upon request.

Shop-alongs

Use the same process to recruit as you would with other ethnographies. As always, be prepared.

Challenge: Trust issues and safety concerns about participating in a shop-along.

Solutions: Meet the respondent in the store to avoid trust issues. If you meet at their home, have the moderator take a separate car to the shop-along.

If you are planning to meet in a smaller store, it is smart to call the store beforehand and ask permission.

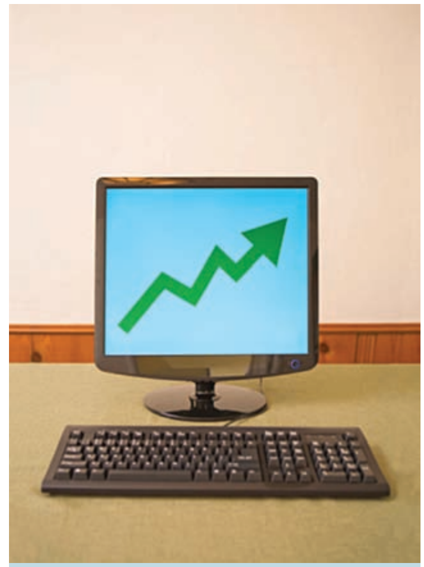
Dinner groups

In addition to the standard processes used for group parties or individual interviews make sure that you are communicating your expectations for the interview.

We have seen dinner groups done many ways. Some include dinner as the incentive but we have found that dinner plus a monetary incentive is the most effective approach. Inform the respondents of the distance they will be driving and how long you will expect them to stay. Some people go out to dinner or spend a short amount of time eating dinner and you do not want their expectations to be out of sync with yours.

Let them know during the initial call and the follow-up what they will need to order (if there is a requirement for that) as well as what costs will be covered by the client and what costs are the respondent's responsibility. | Q research software

Are research software sales due for an increase?



By Tim Macer and Sheila Wilson

Quality rather than the bottom line is the current concern of many market researchers. This general finding emerged from the responses to several questions in the 2007 Confirmit Annual Market Research Software Survey, carried out by meaning ltd.

Though all software packages should help save time and money, improving quality is an altogether more complex goal to achieve through technology and is a challenge the market research (MR) industry can rightly lay at the door of the software vendors.

The results of this survey, now in its fourth year, give software developers plenty to chew on. In addition to quality issues, the findings pose questions such as: Why are so many market research agencies using bespoke software? Even for CATI. And, given the effort involved, why are so many MR firms planning to change their software? And why has this churn rate increased since 2006?

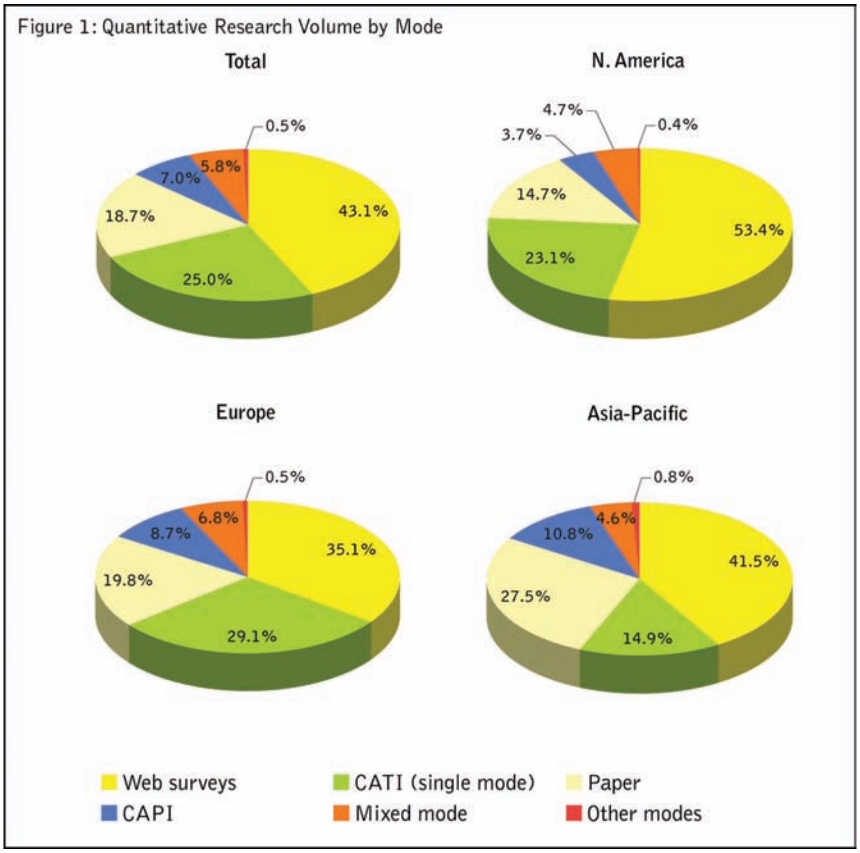
We introduced several new questions into the survey for 2007, including some about continuous research. It's an area not at all well-supported by most software, resulting in many ad hoc and poorly-automated processes for research and fieldwork companies alike. We are astonished to note a level of satisfaction in the status quo bordering on complacency - we are convinced both technology and practice could be so much better in this area.

The 2007 sample represents 233 companies, balanced by region, company size and level of responsibility. The survey was translated into French, German and Japanese. All participants are actively involved in or responsible for IT within their companies, and 70 percent are IT managers, directors or business owners. We are most grateful to every one of them for participating.

Part I of a two-part report on the 2007 Confirmit Market Research Software Survey

North America is the only region in the world where Web research represents over half of total revenues. Figure 1 shows the percentage of total revenue from quantitative work generated by each research mode. Web dwarfs its rivals; CATI, the next biggest, brings under a quarter of revenues, so you could say that in North America Web has more than double the importance of CATI.

Editor's note: Tim Macer is managing director and Sheila Wilson is an associate at meaning ltd., the U.K.-based research software consultancy which carried out the research on which this article is based on behalf of Confirmit. The authors wish to express their gratitude to Confirmit for its permission to publish these results in this article. Part II will appear next month.



CATI and paper are the only other modes that currently have any real volumes when measured by revenues in North America. All others are well below 5 percent; Web, CATI and paper together account for 92 percent of business in North America. In Europe and Asia, it is slightly less concentrated, with 84 percent and 85 percent respectively coming from the big three.

Asia-Pacific is the only place where CAPI on mobile phones has achieved as much as a 5 percent foothold (it is included in the CAPI figure in Figure 1). In North America it languishes at a mere 1 percent and in Europe is just 2 percent. Paper is far more important in the Asia-Pacific region than CATI. It is a region of great contrasts, with both highly developed urban areas and undeveloped rural hinterlands in many countries, where conventional paper may be the only way to reach respondents reliably.

One area where we might anticipate a change in the future is mixed-mode. Two-fifths of companies are kitted out to offer mixed-mode research, but a mere 6 percent of revenues currently come from mixed-methodology surveys.

Industry challenges

MR professionals across the world consider falling response rates to be the No. 1 challenge facing the industry. So-called professional respondents and availability of sample to conduct research are problems two and three, respectively. All of the nominated top three sit squarely on the respondent-facing side of the research triangle, revealing an industry concerned about its raw material above all else.

Time and cost - classic business issues - are rated highly in the overall mix (we asked respondents to select up to three challenges) but come well down the list of No. 1 worries. These are issues more within the control of the research companies themselves. Ten percent of respondents consider turnaround time (from fieldwork to delivery) the top issue, but 37 percent have it as one of their top three concerns, just one point behind professional respondents and availability of sample as overall concerns.

Globally, the contrast in priorities is very revealing, as can be seen in the table of the top four challenges in each region.

Response rates and professional respondents are very much North American preoccupations, it seems. Europe shares concerns over response rates and also client expectations on project turnaround time, but a fifth are concerned with the inaccessibility of research results to decision makers, once the research is done; in Asia-Pacific, there is less

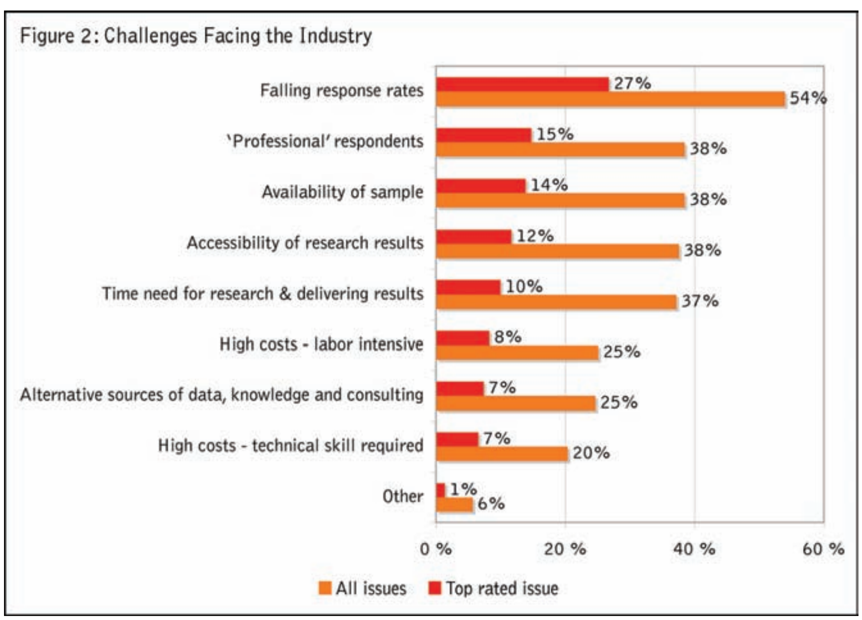


Table 1: Top Four Challenges Facing Researchers, By Region

	North America		Europe		Asia-Pacific
Falling response rates	32%	Falling response rates	25%	High cost base	18%
Professional respondents	17%	Making research findings accessible	20%	Alternative sources of data, knowledge and consulting	18%
Time to conduct research and deliver results	14%	Time to conduct research and deliver results	15%	Falling response rates	18%
Availability of sample	13%	High cost base	10%	Availability of sample	18%

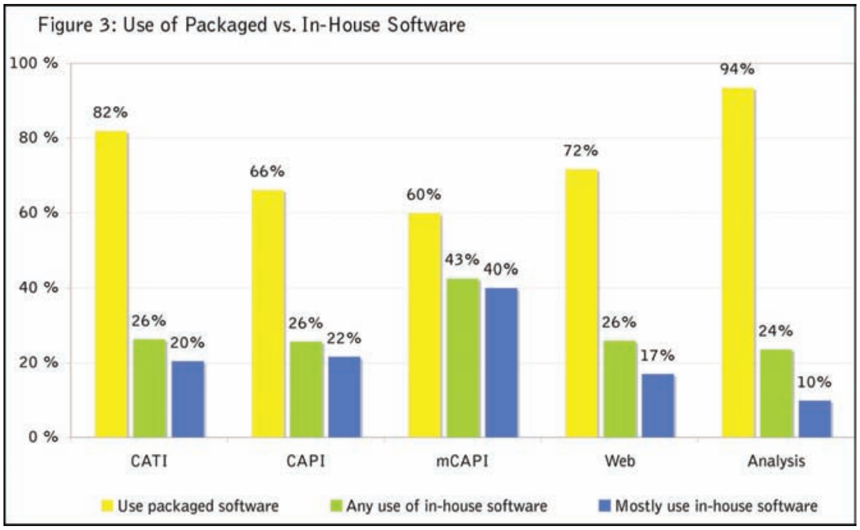


Figure 3: Use of Packaged vs. In-House Software

unanimity about concerns, and costs rank alongside competitive fears and response rate woes.

Outside of Asia-Pacific, encroachment from consulting companies and other data providers does not seem to be generating much unease. We captured only 8 percent looking over their shoulders at this concern in Europe and 6 percent in North America.

Packaged or in-house software

We are truly puzzled at the extent to which research companies are relying on home-built tools (Figure 3). Why is a fifth of market research companies' software developed and maintained in-house? Are the IT specialists within the market research industry suffering "not invented here" delusions, or can it really be that the MR software industry is just not doing what MR companies need at a price they can afford?

And what about mCAPI? On the one hand, the industry is hardly making any money out of it: a mere 1.8 percent of qualitative revenues in 2007 were attributed to mCAPI. On the other hand, it appears that market research companies have been willing to invest in developing their own mCAPI software. Is this a sign that mCAPI as a research channel is going to expand greatly over the next few years? Since this is a newer area, there are fewer off-the-shelf products to choose from, but the ones we have reviewed seem to offer much better value and certainty into the future in this technically-challenging and constantly changing area. We suspect that with mCAPI, as with the other data collection methods, too many research companies are succumbing to the siren call that their work and their clients' needs are so special that the only answer is to develop from scratch - with all of the long-term liability for maintenance and upgrades that this also brings.

The analysis part of the chart in Figure 3 seems less surprising; some 10 percent of agencies use mainly own-developed software. Firstly, this is by far the smallest

Figure 4: Plans to Change Software

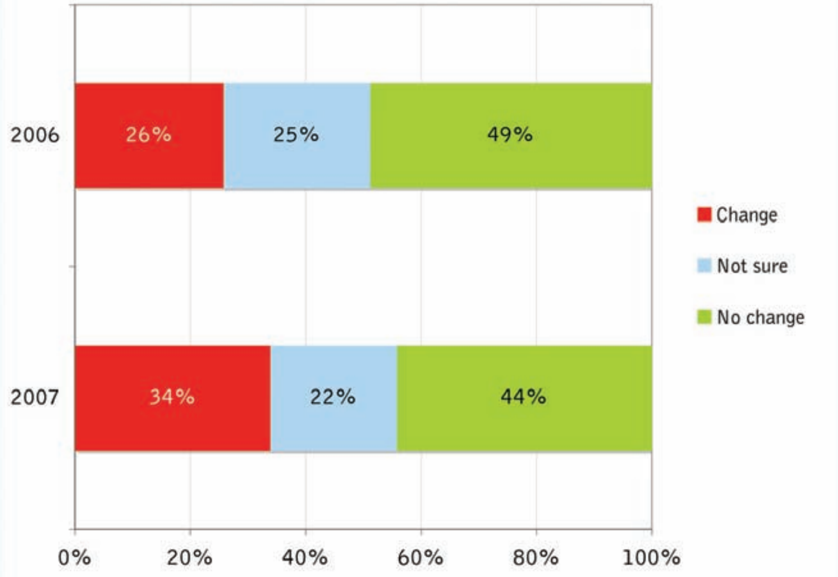


figure on the chart, and secondly, it is surely in the area of results analysis and interpretation where MR companies can really differentiate themselves, so having a non-standard tool might just give the edge.

Plans to change software

Software market shares look set for a shake-up in 2008 (Figure 4). Well under a half of respondents are planning to keep the software they currently have. Over a third are planning to change within the next two years, with the rest being undecided. We have seen a marked shift in the numbers since the 2006 study, where nearly a half of the industry looked set to keep the same software and only a quarter had definite plans to look for new tools.

Among our three worldwide regions, North America seems the most stable since more companies plan to stay loyal to their current technologies. Although, even there, only half say that they have no plans to change; the other half are either planning a change or are undecided. The picture is broadly similar in Europe, but with far fewer firms planning to stick with the same software. However in Asia-Pacific only 29 percent - less than one in three - are planning to keep the same software.

Big companies are the most likely to change their software, and with the largest software contracts to award they have the greatest influence on the marketplace. Nearly half (47 percent) of them, as opposed to around a third of small and medium-sized companies, plan to acquire new software over the next two years. A mere third (32 percent) of large companies think they will keep their existing software, compared with 50 percent of small businesses and 43 percent of medium firms. We predict a turbulent 2008 for some software manufacturers.

Reasons to change software

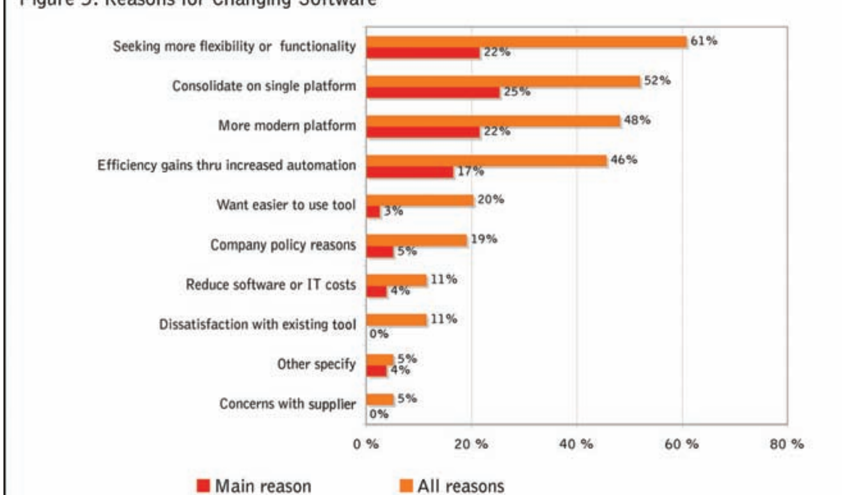
Reasons for changing software seem mainly related to product features and integrating with other tools (Figure 5). Four reasons stood out: seek more flexibility, more capabilities or better functionality; consolidate all activities on a single integrated platform; move to a more modern platform; and achieve efficiency improvements through increased automation.

Yet, despite an apparent unhappiness with software evident here and elsewhere, "dissatisfaction with existing tool" is rarely mentioned explicitly. Nobody cited it as their main reason and only 11 percent mention it as one of their reasons. Cost saving is also low on the list. It seems that although those who are planning to change their software are not unhappy with what they have, nonetheless they see opportunities to increase quality and decrease turnaround times. This should be good news for those suppliers with newer, slicker products.

With the spate of mergers and acquisitions among research companies over recent years, "consolidate on single platform" seems to indicate that these enlarged research enterprises are seeking to eliminate the plethora of products that they have inherited. | Q

Next month: Requirements for mixed-mode capabilities; sample source utilization trends; and future wishes for analysis and reporting.

Figure 5: Reasons for Changing Software



Survey Monitor

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the study recall the 2006 Cheerios ad from General Mills that featured a father using Cheerios to teach his infant football strategy and good health. Fathers speak of AstraZeneca's campaign for Nexium, featuring a dad as the sole caregiver, as another example of advertising that resonates with them. Ford's Bold Moves campaign struck a chord as it featured a divorced father getting dropped off after a weekend with the kids. These ads spotlight dads sharing quality time with their children and using the brand to facilitate parent-child connectedness. But these ads are not the norm; few fathers are able to recall communications that speak to them as dads, recognizing their dedication and unique needs.

The New American Dad study was completed in May 2007 and included a 20-minute online survey of more than 750 fathers of 0-12-year-olds as well as individual and small-group interviews with fathers of kids in the same age range. The sample includes a nationally-representative mix of fathers based on their income, race/ethnicity, marital status, work status and region and their children's ages, genders and living arrangements. For more information visit www.asksmartypants.com.

Perception of good value drives grocery store choice

Good value is the most important factor in determining where global consumers spend their grocery dollars, according to a study by the Nielsen Company, Schaumburg, Ill. Sixty percent of U.S. consumers rank "good value for money" as the most important consideration when choosing a grocery store; 85 percent of global consumers agree.

Nielsen's research shows that after "good value," 28 percent of U.S. consumers choose grocery stores based on the selection of high-quality brands and products while 23 percent choose the grocery store that is closest. Fourteen percent of U.S. consumers choose the most convenient store with easy parking and 9 percent choose a store based on its use of recyclable bags and packaging.

In contrast to the habits of U.S. shoppers, Nielsen finds that Malaysian shoppers prefer supermarkets which offer the most convenient/easy parking; South Koreans, Indonesians and Germans like to shop at the supermarket closest to them; Russians and Indians seek out supermarkets offering a better selection of high-quality brands and products, while Filipinos and Singaporean shoppers top global rankings for placing the most importance on getting good value for money.

The second-most important attribute for U.S. shoppers, as well as shoppers around the world, is a supermarket that offers a better selection of high-quality brands and products.

"This is a perfect example of today's conflicted shopper," says Todd Hale, senior vice president of consumer and shopping insights, Nielsen Consumer Panel Services. "Demanding shoppers expect the best of both worlds from retailers today. On one hand, we're all natural bargain hunters and insist on good value for our grocery dollar, and on the other hand, we expect retailers to stock a wide selection of high quality brands and products so we can indulge in our favorite premium treats. Consumers want the 'cheapest of the cheap' in some categories and the 'best of the best' in others."

The economies in which the highest numbers of consumers cite choosing a supermarket because it offers a better selection of high-quality brands and products are Russia (93 percent), India (79 percent) and China (78 percent) as well as the emerging Baltic countries of Latvia (78 percent) and Lithuania (77 percent) - sending a clear message to retailers operating in or entering those markets and a sharp contrast with the 28 percent of U.S. shoppers who select stores on that basis.

"In fast-growing, emerging markets, there are large numbers of consumers with growing disposable incomes and newly acquired, discerning tastes," says Hale. "These consumers want premium international grocery products in their shopping baskets and seek out supermarkets with a better offering of high-quality, branded products."

For consumers citing "good value" as their most important consideration, Nielsen found that price, promotions and perceptions are most influential in helping consumers define value.

Eighty percent of U.S. shoppers consider it very important or somewhat important for supermarkets to feature frequent promotions and price discounts, while 72 percent believe a store's reputation for delivering low prices - even if, in reality, this is not the case - is very or somewhat important. Ranking third are prices published in the stores' leaflets (71 percent) and everyday low prices (70 percent). Slightly less important to U.S. consumers are discounts for store card holders (63 percent), price comparison across retailers (59 percent), private-label offerings (53 percent) and friends' recommendations (43 percent).

"Our research shows that the importance of good value and low prices resonates much more with lower-income households in the U.S." says Hale. "More affluent households regard quality of fresh produce, meat and seafood and selection above good value. That said, the success of warehouse club retailers speaks loudly to the importance affluent American consumers place on value."

According to the research, three in four consumers around the world consider it very or somewhat important that supermarkets feature frequent promotions and regular price discounts, and 70 percent vote it very or somewhat important that the store have a reputation for being cheaper than competitors. In third place are prices published in the stores' leaflets (62 percent), followed by research and price comparisons across retailers (60 percent), price reductions offered through loyalty/store cards (57 percent) and stores that promised to have everyday low prices (57 percent).

Interestingly, some consumers are not attracted to promotions and regular price discounts. One in four (22 percent) Finnish shoppers do not consider price promotions and discounts to be important, and the emerging European economies of Russia, Hungary and Estonia share this view.

"The retail and media trade are both highly fragmented in Russia's urban centers, and it's difficult for consumers to receive and access information on price discounts and promotions," says Hale. "The main reason Russian shoppers aren't interested in promotions and regular price discounts is simply that they don't know about them because advertising and promotional channels are still underdeveloped."

Nielsen surveyed 26,486 Internet-using consumers in 47 markets in Europe, Asia-Pacific, the Americas and the Middle East on the factors that influenced their choice of grocery store. For more information visit www.nielsen.com.

Execs say marketing basics are most important

The Marketing Executives Networking Group (MENG), a Stamford, Conn.-based collection of marketers who are at a vice president level or above in their organizations, issued the results of its first annual survey of top marketing trends for 2008. The survey of MENG members, conducted by Anderson Analytics, focused on top marketing concepts, buzzwords, global areas of opportunity and targeted customer demographics, as well as the books that marketers look to for inspiration and growth opportunity.

While the marketers weighed in on many marketing concepts a few key areas emerged. Marketing basics (60 percent "very important"), which include specific concepts such as customer satisfaction, customer retention, segmentation, brand loyalty and ROI, were of greatest interest. Search engine optimization (42 percent) had relatively wide appeal, and cut across marketers in all fields. Green marketing (32 percent) was another important emerging concept and it was identified as the trendiest marketing buzzword.

China is viewed as the region with the best future opportunity (52 percent); India is a distant second (20 percent). Few marketers saw other regions such as Eastern Europe, Western Europe, Latin America, Brazil, Russia and Mexico as comparable opportunities. In terms of another important global issue, outsourcing/offshoring, the majority of marketers (77 percent) reported that their companies do not offshore any part of the marketing function. Half of senior marketers are not in favor of offshoring any part of the marketing function, while just under a quarter view it favorably.

When asked about the most important customer demographics, senior marketing executives rank Baby Boomers highest with 88 percent ranking them as either very important or somewhat important. What may be surprising is the fact that Gen X (86 percent), Hispanics (86 percent), women (85 percent) and Gen Y (84 percent) are catching up to Boomers as customer targets.

Senior-level marketing executives read avidly to stay abreast of information and gain insights for their business. The most popular books are not necessarily the most recently published, given that *Good to Great*, *The World is Flat* and *Blink* were the top three most recently read books. In terms of an all-time favorite business book ever read, three in five executives were eager to make a recommendation to their fellow marketers. Topping the list were: *Good to Great*, *Positioning* and *The 7 Habits of Highly Effective People*.

The Marketing Trends Survey was fielded by Anderson Analytics among current MENG members between October 19 and November 20 of 2007. Anderson Analytics used text mining software to code open-ended/free-form text answers to questions to understand what issues were top-of-mind among the senior executives. The 607 responses yield overall statistics with a confidence interval of +/-3.98 percent at the 95 percent confidence level. For more information visit www.mengonline.com.

Social media work for life scientists

Life scientists are highly engaged users of a variety of social media, according to preliminary results of a worldwide study of more than 1,500 scientists released by BioInformatics LLC, an Arlington, Va., research firm. The survey, co-sponsored by BioInformatics LLC and PJA Advertising + Marketing, found that 77 percent of life scientists participate in some type of social media.

The leading reasons for this participation are to find application and troubleshooting tips, protocols and product reviews. In fact, company Web sites were identified as the most trusted source of product information, with 54 percent of respondents indicating that their purchasing decisions are influenced by social media.

Social media refers to blogs, podcasts, online communities, wikis and social networking sites that are increasingly being used by professionals to share experiences, opinions and advice. While scientists still consider their suppliers to be the most trusted source of product information, 45 percent of those surveyed find "access to objective feedback on products and services from multiple sources" to be the most valuable aspect of social media.

"Life scientists were among the first to use the Internet to communicate, collaborate and contribute to a common body of knowledge," says Bill Kelly, president of BioInformatics LLC. "But a new generation of Web applications is making this process easier and faster, which presents both opportunities and challenges for our corporate clients attempting to influence life scientists' purchasing behavior."

Hugh Kennedy, executive vice president and partner at PJA concurred: "Scientists aren't laggards to the IT crowd in social media - they've been right there all along. It's only recently, however, that life science suppliers have begun to grasp social media's potential as a way to bond with their customers in a way that really drives loyalty." For more information visit www.gene2drug.com.

Product and Service Update

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predictive analytics field, as well as thought leaders, to find the solution.

This report, in turn, analyzes how top pharmaceutical marketing leaders are handling pressing marketing return issues and offers new ideas to apply. The research addresses issues such as: ROI basics; practical skills marketers need for measuring marketing effectiveness; tools and best practices that make a difference; measurement principles that drive successful marketing measurement; how to propel strategy, growth and bottom-line return; plus an array of case studies. For more information visit www.pharmamarketingroi.com.

Vision Critical enhances panel system

Vancouver research firm Vision Critical is now offering Panel+ Fall 2007. The system is designed to improve survey authoring, support, panel management and reporting and analysis with new features, including a panel quality index (PQI). With Panel+ Fall 2007, organizations can create a panelist experience with more question types and more point-and-click configuration options. The system offers drag-and-drop question design tools and Microsoft Word import. Once the study is deployed there are tools to manage panelist information and analyze panel performance, including the panel quality index. The PQI provides norms on response rates, completion rates, recruitment, attrition and panelist quality from hundreds of proprietary panels worldwide. For more information visit www.visioncritical.com.

NPD starts tracking sports market in Japan

Port Washington, N.Y., research firm the NPD Group Inc. has launched a new consumer tracking service for the sports market in Japan. The new service offers information on consumer purchasing, attitudes and behavior for sports apparel, athletic footwear and sports equipment. It complements NPD's existing portfolio of services tracking the sports market in the U.S., France, U.K., Germany, Austria, Italy, Spain, Sweden and the Netherlands.

Subscribers to the new service will receive information on who's buying the products, where they are purchased and how they are being used. Measures include sales volume, market share, consumer demographics and more. Sporting goods manufacturers and retailers can use the information to support product development, pricing, distribution, marketing, and sales and merchandising strategies. For more information visit www.npd.com.

Briefly

Observant LLC, a Boston consulting and research management firm, has launched QUESTRILLR, an online software tool designed to improve the speed of the firm's qualitative research. For more information visit www.observant.biz.

Australian research software firm QSR International is now offering the Help Me Choose tool on its Web site. It allows users to select parameters that apply to their project and approach to analysis - such as project size, analysis process, time frame and outputs - which the tool uses to choose the QSR software that's most suited to the user's individual working style or project. An overview of software benefits is also provided. For more information visit www.qsrinternational.com.

In January, Omaha, Neb.-based information firm infoUSA opened a new Manchester, England-based firm to compile a database of all U.K. businesses. Similar to the compilation process of the infoUSA database, details, including staff numbers, manager names and contact information, will be collected and then updated annually via a projected 2.5 million phone calls. For more information visit www.infouk.com.

Research Industry News

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failing to equip Shipp with protective equipment to defend herself.

The companies named in the lawsuit are **GfK NOP LLC** and **Roper Starch Worldwide LLC**, both of New York, and **Roper ASW LLC** of New Jersey.

Shipp was 54 when she went missing. Her car was found in an Independence, Mo., neighborhood, and a witness told police she had been conducting door-to-door surveys. Two fishermen later found remains along the Little Blue River that were identified as Shipp's. No arrests have been made.

Waterloo, Ontario research firm **Ipsos Reid** has donated three sets of national opinion poll data to Wilfrid Laurier University. The announcement marked Ipsos Reid's first-ever donation of polling data and signaled the beginning of a relationship that will see the company provide Laurier with a regular stream of data donations.

The first raw data set represents 55 national telephone surveys of 1,000 respondents each that were conducted monthly between 1990 and 1995. The second is the 2006 Canadian federal election-day poll. It contains information on 90 socio-political and demographic variables from more than 36,000 respondents. The third data set is Ipsos Reid's recent exit poll from the October 2007 Ontario provincial election, which included 7,000 respondents. Taken together, the three sets of data represent the opinions of more than 98,000 Canadians over nearly 20 years.

Arbitron Inc., New York, announced in late November that it would delay the commercialization of its Portable People Meter radio ratings service in nine markets. New York, Nassau–Suffolk and Middlesex–Somerset–Union will be delayed by nine months; Los Angeles, Riverside and Chicago by six months; and San Francisco, San Jose and Dallas by three months.

In these nine markets, the company will extend the use of the paper-and-pencil diary system that has been serving the industry since 1965. During the delay, Arbitron will continue to work with customers, the Media Rating Council, other industry organizations and community groups on the research and business issues related to the Portable People Meter radio ratings service in local markets.

"We remain confident in the audience estimates that the Portable People Meter service is producing. However, feedback from our customers, the Media Rating Council and other constituencies has led us to conclude that the radio industry would be better served if we were to delay further commercialization of the PPM in order to address their issues," said Steve Morris, chairman, president and chief executive officer, Arbitron Inc., in a company press release.

Dallas-based **Common Knowledge Research Services** has partnered with SPCA International to offer people the opportunity to support SPCA's animal programs by completing surveys. The joint initiative, called Donate2Charity, is the first partnership between SPCA and Common Knowledge Research Services, owner of Your2Cents Online Opinion. The program allows anyone eligible for panel membership to support the SPCA, including those who may not have the money to contribute directly, but have the time to complete online surveys. After signing up at www.your2cents.com/spca, members' rewards will automatically be donated to the SPCA once a survey is completed.

Greenfield Online Inc., Wilton, Conn., announced the organizational integration of its worldwide survey business. This integration, on top of one universal panel system or UPS technology platform, is intended to enable the company to operate its European, North American and Asian Internet survey businesses as one global organization with increasing operational efficiency.

The global Internet survey business will be led by Keith Price, newly appointed executive vice president, global Internet survey solutions. Price will assume the duties of managing the European survey business from Nicolas Metzke, managing director of Ciao Surveys GmbH, who has left the firm.

Other organizational consolidations of note include the following: global technology in the Internet survey solutions business will be managed by David St. Pierre, global chief technology officer; global marketing will be managed by Janice Caston, assistant vice president of marketing; Asia, led by Andy Ellis, managing director Asia, has been integrated into the firm's global technology platform.

Acquisitions/transactions

Ipsos Global Network, a research company headquartered in Paris, has taken a 75 percent stake in **Indica Research**, an independent Indian marketing research company, with a view to increasing the holding in the future. Indica Research, which specializes in marketing and advertising research and research for customer relationship management, was founded in 1994 and has three managing directors, V.G. Pillai, V. Ravi and B. Nary Narayanaswamy.

Port Washington, N.Y., research firm the **NPD Group Inc.** announced the integration of the people and products of **Current Analysis West** under the NPD Group brand umbrella. NPD acquired Current Analysis West in May 2007, but until now had operated the business independently. With the integration, NPD offerings now include Current Analysis West's products.

The new organization will be led by Peter Greene, vice president and general manager. Patrik Schmidle, formerly vice president, operations and product management for Current Analysis West, now leads the San Diego IT/engineering team. Rich Alires, previously executive vice president for Current Analysis West, has moved to DisplaySearch, an NPD Group company, to lead its sales efforts.

Taylor Nelson Sofres plc has reached agreement to increase its ownership of **LatinPanel Holdings** from 33.3 percent to 100 percent. TNS was formerly a joint venture partner with the NPD Group Inc. and the IBOPE Group in this continuous consumer panel business serving Latin America. Gross assets of LatinPanel Holdings on December 31, 2006 were approximately $9 million.

Waltham, Mass., research firm **Decision Resources** announced plans to acquire **Wood Mackenzie's Life Sciences** business. The Life Sciences business comprises market research, data and analysis on the commercial landscape of the biopharmaceutical industry and the animal health industry.

Separately Decision Resources announced it had acquired **Arlington Medical Resources Inc.**, a Malvern, Pa., provider of market intelligence for the pharmaceutical and diagnostic imaging industries.

Research firm **IMS Health**, Norwalk, Conn., has acquired **MIHS Holdings, Inc.** The company's two subsidiaries – Milwaukee-based IHS and MedInitiatives, Sacramento, Calif. – provide the health care market with analytics and technology services.

London-based **Synovate** announced the acquisition of **SPSL**, a U.K.-based provider of store traffic measurement and analysis to retailers. SPSL monitors visits to over 4,600 retail premises annually in the U.K. and operates across 15 countries in Europe and North America.

Added Value, a brand development firm, has acquired **Cheskin**, a Redwood Shores, Calif., consulting and research firm. Cheskin is now known as Cheskin Added Value.

Paris-based **Ipsos** has acquired **ResearchPartner**, an Oslo, Norway research firm.

Synovate Healthcare, the health care arm of international market research agency Synovate, has opened a new office in Toronto to offer ad hoc and syndicated research services to the Canadian health care and pharmaceutical markets. Leading the new operation is Otto Akkerman, who has joined the company as head of Synovate Healthcare Canada.

New York research firm **TNS** has acquired **Landis Strategy & Innovation LLC**, a research-based consultancy located in Palm Beach Gardens, Fla.

Private equity fund **DCA Capital Partners** announced the closing of its equity capital investment into Fresno, Calif., research firm **Decipher Inc.**

Fairfax, Va., mystery shopping firm **Bare Associates International Inc.** has acquired **Video Eyes LLC**, a provider of video mystery shopping and video staff training.

Alliances/strategic partnerships

Cincinnati research firm **Language Logic** has signed an agreement to license the verbatim coding system and text categorization technology of the **Institute of Information Science and Technologies** within Language Logic's Ascribe online verbatim management system.

Europe-based research firm **Toluna** has entered into an exclusive cooperation agreement with **Incisive Media Limited,** a business-to-business information provider, to build business-to-business panels across Incisive Media's vertical markets. The agreement provides Toluna with exclusive access to Incisive Media's readership base from print and online business-to-business titles for panel community recruitment.

Association/organization news

The **Qualitative Research Consultants Association** announced its new board of directors: president – Sharon Livingston; vice president – Christine Kann; treasurer – Abby Leafe; secretary – Nancy Hardwick; directors – Martha Guidry, Ilka Kuhagen, Peter Lovett, Joel Reish and Nancy Ulrich. The organization also announced that Hank Goldwasser, owner of New Directions Consulting in New York, won its President's Award and Jeff Walkowski, owner of Minnesota research firm QualCore.com, won the Maryanne Pflug Spirit Award.

Awards/rankings

New York-based **BuzzBack Market Research** has earned the international MRS/ASC Award for Technology Effectiveness. The award acknowledges outstanding innovation and excellence in the application of software or technology to market, opinion and social research. BuzzBack was selected from a group of four finalists for its eCollage and Verbatim Viewing consumer research tools.

Chicago software firm **SPSS Inc.** announced that its data mining technology has been ranked as the leading choice in an independent survey published by Rexer Analytics. The Rexer Analytics report, "Surveying the Field: Data Mining Applications, Analytic Tools, and Practical Challenges," found almost one-half (48 percent) of data mining professionals from more than one dozen industries and 35 countries identified SPSS as their most frequently-used data mining tool. The survey also found SPSS as the tool of choice for data miners engaged in customer relationship management and telecommunications.

20/20 Research Inc., Nashville, Tenn., has been named by *Business TN* magazine to the Hot 100 list, recognizing them as one of the 100 fastest-growing companies in Tennessee.

New accounts/projects

Mathew Greenwald & Associates Inc., a Washington, D.C., research firm is using Canada-based **Voxco**'s Command Center, a system for creating and managing survey campaigns using multiple and mixed-mode data collection.

New companies/new divisions/relocations/expansions

Sausalito, Calif., research firm **King Brown Partners Inc.** has spun off its Kentucky operations to Element Market Research Inc., a new Kentucky-based company that will continue to specialize in quantitative market research. The principals and co-managers of Element Market Research will be Chris Grecco and Shannan Gabe, who previously managed the Kentucky operations of King Brown Partners in Lexington.

Vancouver research firm **Vision Critical** has opened an office in central London. Jeremy Holt, newly appointed sales director, will lead the branch with Paul Albert, an existing Vision Critical employee moving to London as sales manager.

Redlands, Calif., geographic information system firm **ESRI** has opened an office in Singapore.

Names of Note
continued from page 10

also serve on the audit committee.

Portland, Ore., research firm *Market Strategies International* has named **Ken Athaide** senior vice president in its technology research and consulting division.

Redlands, Calif.-based geographic information system firm *ESRI* has added **Nick Land** to its European operations as the new business development manager for cadastre and national mapping agencies.

Marketing firm *Wunderman New York* has named **Ben Elgart** information architect. He is responsible for usability and user experience.

Ad agency *Carmichael Lynch* has promoted **Corey Johnson** to director of consumer engagement, a new position.

Marketing firm *Avenue A | Razorfish Seattle* has promoted **Jonathan Rosoff** to vice president of strategy and customer insights.

Atlanta transcription company *MRT Services* has named **Geoff Stanton** and **Christina Kosal** to its client services team as account managers.

The Nielsen Company, New York, has named **Greg Farrar** president of Nielsen Business Media.

Lisa Cooper has joined *Rothstein-Tauber Inc.* a Stamford, Conn., research firm, as senior vice president of client services.

Ali A. Moiz, chief operating officer of San Francisco research firm *Peanut Labs Inc.*, has been appointed to the Advertising Research Foundation's Online Research Quality Council.

In London, **John Coll** has been named head of researcher Synovate UK's consumer goods group and qualitative research business. Synovate has named **Ehtasham Uddin** director, quantitative in Malaysia. **Brent Stewart**, Synovate CEO for Australia and New Zealand, has been appointed CEO global business planning. He will continue leading the Australia and New Zealand businesses from Perth in addition to his new responsibilities. Also in London, Synovate has named **Tony Smith** head of its financial services industry sector in the U.K.

Pierre Giacometti and **Stephane Truchi**, each a general manager of *Ipsos France*, have left the company. Until new general managers are found, Ipsos Co-President **Jean-Marc Lech** will assume operational responsibility of Ipsos France.

In the London office of researcher *TNS* **Rosie Hawkins** has been named global head of brand and communications research.

2008

Marketing Research

Software Directory >>>

The 2008 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 72
The software cross-reference tables begin on page 90

ActiveGroup
3720 da Vinci Court
Norcross, GA 30092
Ph. 770-449-5539
info@activegroup.net
www.activegroup.net
Software:
ActiveGroup

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

Alleviation Software, Inc.
4550 Mansfield Highway
Fort Worth, TX 76119
Ph. 817-860-8589
info@surveycharter.com
www.surveycharter.com
Software:
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7300 Willow Ave.
Takoma Park, MD 20912
Ph. 301-270-0795
info@altaplana.com
www.altaplana.com
Software:
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SuperSTAR
SuperWeb

Alucid Solution
5887 Glenridge Dr., Suite 350
Atlanta, GA 30328
Ph. 678-904-9490 or 866-275-8436
services@alucid.com
www.alucid.com
Software:
UsabilityWare

AmSoft Systems US LLC
1301 Shorway Rd., Suite 155
Belmont, CA 94002
Ph. 650-508-8955
gabe.wachob@amsoft.net
www.amsoft.net
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:
1701 E. Lake Ave., Suite 408
Glenview, IL 60025
Ph. 847-901-4480
jerry.madansky@analyticalgroup.com
www.analyticalgroup.com
Jerry Madansky, CEO
Software:
Arthur
M-Link
Q-Leap
QueryWeb
Sp-Link
WinCross
WinLink
WinQuery

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.
(See advertisement on p. opposite page)

Anyware Mobile Solutions
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Ph. 918-280-8693
sales@goanyware.com
www.goanyware.com
Software:
Reform

Apian Software
115 N. 85th St., Suite 204
Seattle, WA 98103
Ph. 800-237-4565
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www.apian.com
Software:
DecisionPad
SurveyPro

ARCS® IVR Systems
565 Virginia Dr.
Fort Washington, PA 19034-2706
Ph. 800-336-7674 or 215-653-7100
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retail@arl-consulting.com
www.arl-retail.com
Software:
Mystery Shopping Software

ASDE Survey Sampler
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Whether you're considering software for questionnaire design, CATI, CAPI, online surveys or statistical analysis, ASKIA is the proven choice. Established in 1994 and with offices in London, Brussels, New York and Paris, ASKIA are gaining an enviable reputation as much for their support as for the quality of their products.
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Software:
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RSI has developed the first presentation automation software tool that allows you to automate both tracking and ad hoc projects. Powerful, yet designed with ease of use in mind, Rosetta Studio allows you to populate existing documents or generate completely new ones. Research firms ranging from one-person shops to top 10 multinationals are using Rosetta Studio to slash their reporting times and improve accuracy.
(See advertisement on opposite page)

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Software:
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Roelf Kuitse
Software:
ExpertScan
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BayaSoft LLC
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Leominster, MA 01453
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Software:
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BayaSoft RTD - Real Time Data
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BayaSoft SMS - Sample Management Service

Beach Tech Corporation
4131 Vincent Ave. S.
Minneapolis, MN 55410
Ph. 612-924-9193 ext. 521 or 800-323-0434
sales@beachtech.com
www.beachtech.com
Software:
Eform

Bruce Bell & Associates, Inc.
603 Main St.
Canon City, CO 81212
Ph. 800-359-7738
sales@surview.com
www.surview.com
Software:
Surview Sales Media Research Edition

Business Forecast Systems
68 Leonard St.
Belmont, MA 02478
Ph. 617-484-5050
info@forecastpro.com
www.forecastpro.com
Software:
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Forecast Pro Unlimited
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Caliper Corporation
1172 Beacon St., Suite 300
Newton, MA 02461
Ph. 617-527-4700
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Software:
Maptitude
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CAMO Smart Software Inc.
One Woodbridge Center, Suite 319
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Software:
The Unscrambler
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Cardiff Software
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3220 Executive Ridge
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Ph. 760-936-4500
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Software:
Teleform

CfMC Research Software
547 Howard St.
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Lou Smith, General Manager
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Common Knowledge Research Services
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Steven R. Lavine, President
Software:
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Common Knowledge offers comprehensive, easy-to-use survey creation software free with use of our consumer, health care, B2B, IT or other online panels. The intuitive, Web-based Survey Creator provides everything you need to design and program surveys right from your desktop, or from anywhere in the world with an Internet connection. Contact us today and see how we are raising the bar for online research!
(See advertisement on p. 63)

Comstat Research Corporation
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Cortlandt Manor, NY 10567
Ph. 914-739-6800
comstat@cstat.com
Software:
Interview & Analysis Program
Text Analysis Program-TAP

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Endorsed by market research agencies and Global 1000 companies, Confirmit has become the world's leading survey and reporting software for market research and enterprise feedback management (EFM). Confirmit provides users with the most advanced and comprehensive set of survey and reporting features while the user-friendly interface makes it operable for individuals regardless of their familiarity with survey software. Businesses implementing Confirmit can rest assured that the software's benefits provide both short- and long-term return on investment (ROI).
(See advertisement on quirks.com)

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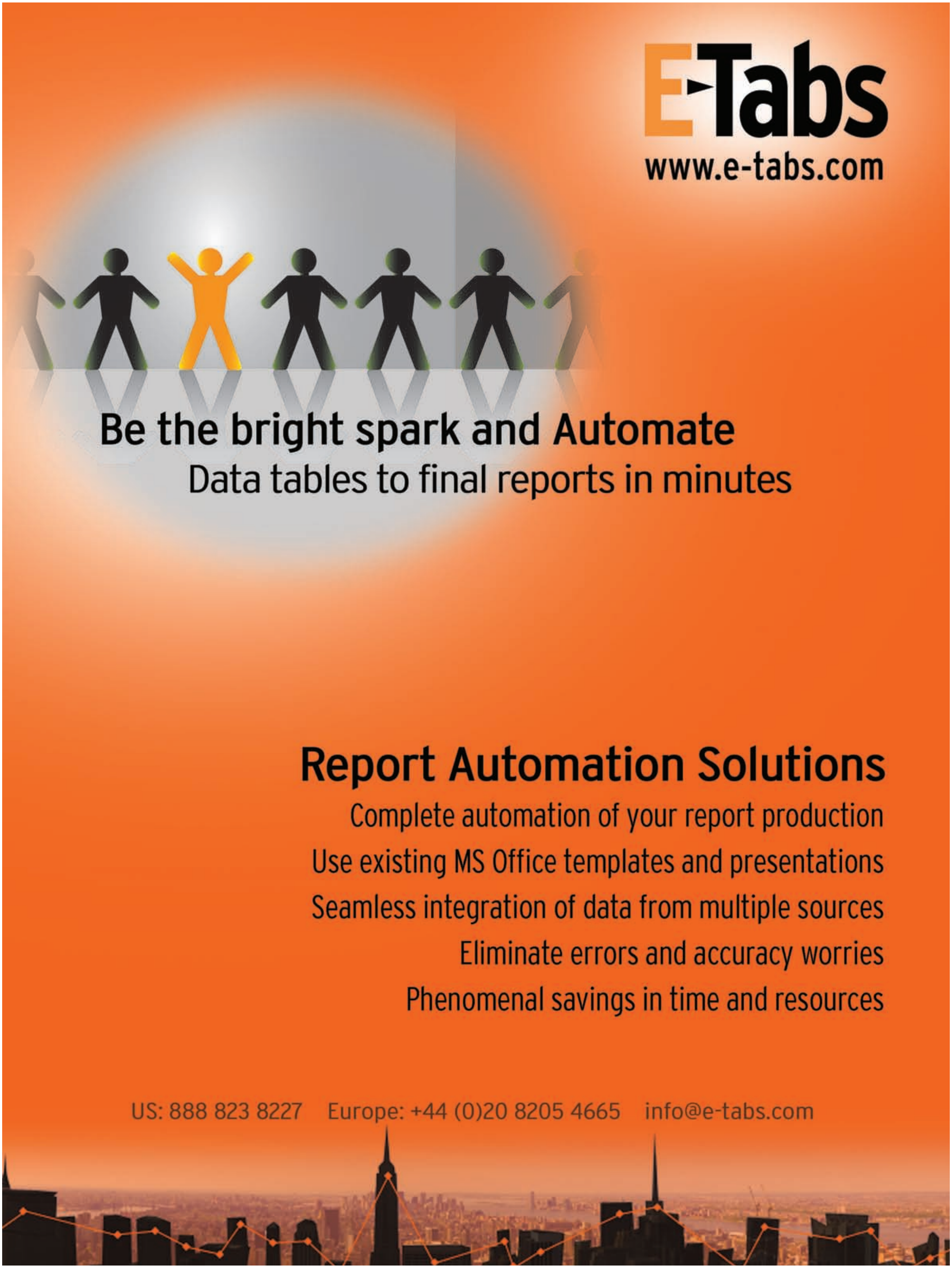
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Bill Eaton, Vice President
Software:
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Ph. 323-871-2145
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Sally Hooper, Owner
Software:
Interque

Cybernetic Solutions - The Survey Software
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West Jordan, UT 84084-6902
Ph. 801-966-0999 or 888-966-0999
cyberman@xmission.com
www.cneticsolutions.com
R. Kent Francis, President
Software:
The Survey

Cytel Inc.
675 Massachusetts Ave.
Cambridge, MA 02139
Ph. 617-661-2011
sales@cytel.com
www.cytel.com
Software:
East 4.0
LogXact
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StatXact Procs for SAS Users

Database Sciences, Inc.
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www.databasesciences.com
Software:
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PO Box 9707, Station T
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Software:
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DATAN, Inc. - Data Analysis Systems & Services
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sales@decipherinc.com
www.decipherinc.com
Branch offices:
1106 N Hudson Ave
Los Angeles, CA 90038
Ph. 323.466.0575
Contact: Kristin Luck, President

305 Broadway, 9th Floor
New York, NY 10007
Ph. 866.922.7080
Contact: Duane Joseph, Account Executive
Software:
Decipher

A marketing research services provider, Decipher specializes in online survey programming, data collection, data processing/reporting and custom technology development. Utilizing Web-based applications, Decipher integrates state-of-the-art technology with traditional research techniques. Decipher's survey tools and data reporting suite provide users with the ability to automate post-field production, significantly increasing the accuracy and quality of research reporting.
(See advertisement on p. 15)

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Arlington, TX 76011-3100
Ph. 817-640-6166 or 800-262-5974
jthomas@decisionanalyst.com
www.decisionanalyst.com
Jerry W. Thomas, President/CEO
Software:
STATS

STATS™ 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. 59)

Decision Support Sciences
1751 W. Diehl Rd., Suite 150
East West Technology Center
Naperville, IL 60563
Ph. 630-428-1847
info@decisionsupportsciences.com
www.decisionsupportsciences.com
Software:
MiningSolv
PositionSolve
PrefSolv
SatisSolve
SegmentSolv

Delphus, Inc.
152 Speedwell Ave.
Morristown, NJ 07960
Ph. 973-267-9269
hlevenbach@delphus.com
www.delphus.com
H. Levenbach, President
Software:
PEER Forecaster
PEER Planner for Windows

Domestic Data
Am Fasangarten, 31
Vienna 01120
Austria
Ph. 43-1-817-85-32
info@domestic.at
www.domestic.at
Raul Paramo
Software:
Internet Research Manager

Easy Analytic Software, Inc.
240 Benigno Blvd.
Bellmawr, NJ 08031
Ph. 856-931-5780
info@easidemographics.com
www.easidemographics.com
Software:
The Rite Site

Empathica Inc.
2121 Argetia Rd., Suite 200
Mississauga, ON L5N 1A6
Canada
Ph. 888-633-1633 or 905-542-9001
info@empathica.com
www.empathica.com
Jeff Chemeres, V.P. Business Dev.
Software:
Empathica Customer Experience Mgmt. System

Enetrix
8476 Greenway Blvd., Suite 100
Middleton, WI 53562
Ph. 608-664-3877
charles.carlson@enetrix.com
www.enetrix.com
Charles Carlson, CEO/President
Software:
PRIME Library: Compensation Surveys
PRIME: Custom Online Survey Software
SIGHT: e-content manager

ESRI
8615 Westwood Center Dr.
Vienna, VA 22182
Ph. 800-292-2224
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www.esri.com
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(See advertisement on p. 77)

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P.O. Box 1259
Holland, MI 49422-1259
Ph. 616-396-1142 or 800-257-6390
sales@fleetwoodgroup.com
www.replysystems.com
Software:
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(See advertisement on p. XX)

FocusVision Worldwide
1266 E. Main St.
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info@focusvision.com
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FocusVision is the world's leading provider of video transmission, recording and analytical tools for the qualitative market research industry. Clients rely on its solutions to maximize the value and effectiveness of their work. The solutions help increase participation, while reducing the travel costs and scheduling demands associated with bringing key stakeholders to the research site. Advanced analytical tools enable clients to gain a deeper understanding in their research efforts, empowering them to make smarter business decisions. For more information about FocusVision, visit www.focusvision.com.
(See advertisement on p. 79)

Forall Systems, Inc.
203 N. Wabash Ave., Suite 1000
Chicago, IL 60601
Ph. 800-337-4203
info@forallsystems.com
www.forallsystems.com
Karen Jeffrey, Ph.D., President
Software:
ForSurveys

GENESYS Sampling Systems
565 Virginia Dr.
Fort Washington, PA 19034-2706
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info@m-s-g.com
www.genesys-sampling.com
Gregg Kennedy, Vice President
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(See advertisement on pp. 45, 83)

Global Bay Mobile Technologies
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Ph. 908-822-7100
sbhanote@globalbay.com
www.globalbay.com
Software:
AccessPoint for Market Research

Globalpark US
405 Lexington Ave., 26th Floor
New York, NY 10174
Ph. 1-888-299-9422
info@globalpark.us
www.globalpark.com
Daniel Coates
Software:
EFS-Panel
EFS-Survey

GMI (Global Market Insite, Inc.)
1100 112th Ave. N.E., Suite 200
Bellevue, WA 98004
Ph. 866-5-ASK GMI or 206-315-9300
infoq@gmi-mr.com
www.gmi-mr.com
Dan Fitzgerald
Software:
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(See advertisement on opposite page)

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Malvern, PA 19355
Ph. 800-858-0860 or 610-647-7850
sales@gravic.com
www.gravic.com/remark
Sales Department
Software:
Remark Classic OMR
Remark Office OMR
Remark Web Survey Professional
Remark Web Survey Standard

Hamilton-Locke, Inc. - Verbatim Analysis
1902 N. Canyon Rd., Suite 120
Provo, UT 84604
Ph. 801-356-3512
jneubert@hamiltonlocke.com
www.hamiltonlocke.com
Software:
MAIA Market Attitude & Intent Analysis

Hexworx Computer Services P/L
3/38 Lockhart St.
Como, WA 06152
Australia
Ph. 61-8-9450-4814
admin@hexworx.com
www.hexworx.com
Susan Hoddinott, Director
Software:
TestKit

Hostedware
16 Technology Dr., Suite 116
Irvine, CA 92618
Ph. 949-585-1500 ext. 1507 or 800-211-6967
sales@hostedware.com
www.hostedware.com
Software:
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Hosted Survey
Hosted Test
Hosterd Survey Lite

Information Tools Ltd.
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Park Ridge, IL 60068
Ph. 847-384-1080
mail@infotool.com
www.infotool.com
Software:
ESPRI
HARMONI

Inquisite Inc.
3001 Bee Caves Rd., Suite 300
Austin, TX 78746
Ph. 512-225-6800 or 800-581-7354 (sales)
info@inquisite.com
www.inquisite.com
Sam Eder
Software:
Inquisite Survey System

Insight Marketing Systems Pty. Ltd.
12/171 Fitzroy Street
St. Kilda, VIC 03182
Australia
Ph. 61-3-9534-5699
info@insightmarketing.com.au
www.researchreporter.com
Daryl Maloney McCall
Software:
Research Reporter

Intellisurvey, Inc.
111 Corporate Dr., Suite 170
Ladera Ranch, CA 92694
Ph. 949-298-4400
info@intellisurvey.com
www.intellisurvey.com
Jonathan Ephraim, Managing Director
Software:
Intellisurvey

Intergam Online
750 W, Lake Cook Rd., #158
Buffalo Grove, IL 60089
Ph. 847-459-0064
info@intergam.com
www.intergam.com
Alex Shchekin, CEO
Software:
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Interview Technology
Raadhuisstraat 46
1016 DG Amsterdam
Netherlands
Ph. 31-20-620-15-89
itsales@interviewtechnology.com
www.interviewtechnology.com
Andre Smit
Software:
IT CATI/CAPI/Web

Itracks
150 - 820 51st Street E.
Saskatoon, SK S7K 0X8
Canada
Ph. 306-665-5026 or 888-525-5026
info@itracks.com
www.itracks.com
Software:
Bulletin Board Focus Groups
Cutom Panel Building
Itracks Online CATI
Itracks Online Surveys
Mobile Surveys
Online Focus Groups
Qualmetrix
Virtual Call Center Network

Kinesis Survey Technologies, LLC
6836 Austin Center Blvd., Suite 140
Austin, TX 78731
Ph. 512-372-8218
info@kinesissurvey.com
www.kinesissurvey.com
Software:
Kinesis Survey

Kinesis Survey Technologies™ provides a powerful Web survey solution for designing, fielding and managing online projects for Web or wireless. An intuitive user interface allows easy programming of complex survey functions such as quotas, nested conditions, rotational concepts and media insertion - with robust real-time reporting. It is scalable, with in-house programming services, ASP version and full software licenses/hosting options.
(See advertisement on this page)

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helpdesk@us.kantarmedia.com
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XPert and ViewGraphic Suite™

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Canada
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sales@lidlow.com
www.lidlow.com
Jeff Jebson, Director of Sales & Marketing
Software:
Delve!Online™

Marketing and Research Data Consultants
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Tonbridge, Kent TN9 2HZ
United Kingdom
Ph. 44-1732-350035
info@mrdcsoftware.com
www.mrdcsoftware.com
Software:
MRDCL
OnTraq
Report Direct

Marketing Masters
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De Pere, WI 54115
Ph. 920-737-7676
sales@surveysaid.com
www.surveysaid.com
Software:
Internet Survey Machine
Survey Said Enterprise Edition

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Dale W. Kulp, President/CEO

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(See advertisement on p. 45, opposite page)

MarketingStat
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Switzerland
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info@marketingstat.com
www.marketingstat.com
Software:
MM4XL 7.0

MarketSight LLC
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Cambridge, MA 02141-1802
Ph. 866-622-2763 or 617-582-3800
sales@marketsight.com
www.marketsight.com
Michael DeNitto, CEO
Software:
MarketSight®

MarketTools, Inc.
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Marketing Decision Support Systems, Inc.
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Indianapolis, IN 46216
Ph. 317-541-9740
kathy@mdssworld.com
www.mdssworld.com
Kathy Pellman, Vice President
Software:
Data Tailor
Research Tracker II
Research Tracker II for Medical Respondents

MediaAnalyzer Software & Research, Inc.
708 Third Ave., 6th floor
New York, NY 10017
Ph. 212-209-3979
boyar@mediaanalyzer.com
www.mediaanalyzer.com
Charles Boyar, Vice President
Software:
AttentionTracking

Memphis International
The Octagon
Exchange Tower
London E14 9GE
United Kingdom
Ph. 44-870-446-0640
post@memphissoftware.com
www.memphissoftware.com
Software:
Media Explorer
Survey Explorer
Survey Explorer Web Server
Survey Transformer
Survey Viewer

Microtab, Inc.
10945 State Ridge Rd., Suite 401-260
Alpharetta, GA 30022
Ph. 770-664-9244
larry.hills@microtab.com
www.microtab.com
Larry Hills, Managing Director
Software:
Microtab Version 7 - Professional Edition
Microtab Version 7 - Standard Edition
Microtab Version 7 SPSS Add-on Module

Modern Survey, Inc.
701 N. 3rd St., Suite 202
Minneapolis, MN 55401
Ph. 612-399-3837 or 866-876-8242
ask@modernsurvey.com
www.modernsurvey.com
Software:
Modern360 Feedback

Moskowitz Jacobs Inc.
1025 Westchester Ave.
White Plains, NY 10604
Ph. 914-421-7400
mji@mji-designlab.com
www.mji-designlab.com
Software:
IdeaMap®.Net
StyleMap®.Net

MSInteractive - Perception Analyzer
111 S.W. 5th Ave., Suite 1850
Portland, OR 97204
Ph. 503-225-8418 or 800-769-0906
analyzer@perceptionanalyzer.com
www.perceptionanalyzer.com
David Paull, Vice President
Software:
Perception Analyzer

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

NCSS
329 N. 1000 E.
Kaysville, UT 84037
Ph. 801-546-0445
sales@ncss.com
www.ncss.com
Jerry Hintze
Software:
NCSS

NEBU b.v.
Assum 16a
1911 ML Uitgeest
Netherlands
Ph. 31-25-131-14-13
nebu@nebu.com
www.nebu.com
Software:
Dub InterViewer
Dub Knowledge
Dub Planner

New Age Media Systems, Inc.
1350 Broadway, Suite 2215
New York, NY 10018
Ph. 212-695-1590
steve@crosstab.com
www.crosstab.com
Steve Molkenthin
Software:
EzMedia Plan

NIPO Software
P.O. Box 247
1000 AE Amsterdam
Netherlands
Ph. 31-20-522-59-89
info@niposoftware.com
www.niposoftware.com
Jeroen Noordman
Software:
NIPO CAPI System
NIPO DIANA
NIPO Fieldwork System
NIPO Fieldwork System for CATI
NIPO Fieldwork System for Web

Oakdale Engineering
23 Tomey Rd.
Oakdale, PA 15071
Ph. 724-693-0320
sales@curvefitting.com
www.curvefitting.com
Software:
DataFit/DataFit X

ObjectPlanet AS
Ovre Slottsgate 5
0157 Oslo
Norway
Ph. 47-22-33-33-60
torgeir@objectplanet.com
www.objectplanet.com
Software:
Opinio

Optimum Solutions Corp.
266 Merrick Rd.
Lynbrook, NY 11563
Ph. 516-247-5300
ira.sadowsky@oscworld.com
www.oscworld.com
Ira Sadowsky, Exec. Vice President
Software:
FAQSS

PAI-Productive Access, Inc.
22343 La Palma Ave., Suite A110
Yorba Linda, CA 92887
Ph. 800-693-3111 or 714-693-3110
bhontz@paiwhq.com
www.paiwhq.com
Brad Hontz, Director
Software:
mTAB Research Analysis System

PAI's mTAB™ service is a uniquely powerful tool for the analysis of survey research data. Now in use for over 18 years at many of the world's largest consumer product companies, mTAB™ enables our customers' "knowledge workers" to quickly and easily link and mine large even the largest survey research data sets.
(See advertisement on opposite page)

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Honolulu, HI 96826
Ph. 808-942-1600
steve@patterndiscovery.us
www.patterndiscovery.us
Software:
Impact! Analysis

Pitney Bowes MapInfo
One Global View
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Ph. 518-285-6000 or 800-327-8627
sales@mapinfo.com
www.mapinfo.com
Software:
MapInfo Professional/MapX

Prezza Technologies, Inc.
1 Mifflin Pl., 3rd Floor
Cambridge, MA 02138
Ph. 617-715-9600 or 866-430-8274
info@prezzatech.com
www.prezzatech.com
Software:
Checkbox Mobile Survey
Checkbox Survey

PRO-T-S® Telephony Systems
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Dan Bernard, Vice President
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(See advertisement on pp. 45, 83)

P-STAT, Inc.
230 Lambertville-Hopewell Rd.
Hopewell, NJ 08525-2809
Ph. 609-466-9200
sales@pstat.com
www.pstat.com
Sebbie Buhler
Software:
P-STAT

Pulse Group
Level 20, Tower 2 Darling Park
201 Sussex Street
Sydney, NSW 02009
Australia
Ph. 61-2-9006-1685
bob.chua@pulse-group.com
www.pulse-group.com
Software:
Pulse DNA Software Suite

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(See advertisement on p. 26)

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Jupiter, FL 33458
Ph. 561-743-7500
sales@pttsystems.com
www.pttsystems.com
Henry A. Copeland, President
Software:
Bellview CAPI
Bellview CATI
Bellview Fusion
Bellview Scan
Bellview Web
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Oxon OX10 9TA
United Kingdom
Ph. 44-1491-825644
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www.qpsmr.ltd.uk
Ros Biggs, Director
Software:
QPSMR CATI
QPSMR INPUT
QPSMR INSIGHT
QPSMR REFLECT
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302 N. Irving St.
Arlington, VA 22201
Ph. 703-528-1288
info@qqqsoftware.com
www.qqqsoftware.com
Panela Weeks, President
Software:
TPL Tables

QSR International Pty. Ltd.
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Cambridge, MA 02138
Ph. 617-491-1850
info@qsrinternational.com
www.qsrinternational.com
John Woolcott
Software:
NVivo
XSight

QuestionPro.com
24206 S.E. 36th Place
Issaquah, WA 98029
Ph. 206-686-7070 or 800-531-0228
kevin.battey@surveyanalytics.com
www.questionpro.com
Software:
QuestionPro
QuestionPro MicroPoll
Survey Console
VerticlePanel

Quick Tally Audience Response Systems, Inc.
1415 E. Washington Blvd.
Los Angeles, CA 90021
Ph. 213-745-9595
sales@qtis.com
www.quicktally.com
Software:
Quick Tally

Raosoft, Inc.
6645 N.E. Windermere Rd.
Seattle, WA 98115
Ph. 206-525-4025
raosoft@raosoft.com
www.raosoft.com
Catherine McDole Rao, Vice President
Software:
Raosoft EZReport
Raosoft EZSurvey
Raosoft InterForm
Raosoft SurveyWin

RDA Group
450 Enterprise Court
Bloomfield Hills, MI 48302
Ph. 248-332-5000
fbykaylo@rdagroup.com
www.rdagroup.com
Software:
TabRight

ReadSoft, Inc.
3838 N. Causeway Blvd, Suite 2620
Metairie, LA 70002
Ph. 504-841-0100 or 888-READSOFT
info-us@readsoft.com
www.readsoft.com
Software:
ReadSoft Documents for Forms

Resource Systems Group, Inc.
55 Railroad Row
White River Junction, VT 05001
Ph. 802-295-4999
cadams@rsginc.com
www.rsginc.com
Software:
IVIS

Rogator Software AG
Pilotystr. 8
90408 Nuremberg
Germany
Ph. 49-911-81-005-50
info@rogator.de
www.internet-rogator.com
Software:
Software G3
Software G4

RONIN Corporation
2 Research Way
Princeton, NJ 08540
Ph. 609-452-0060
info@ronin.com
www.ronin.com
Software:
Results for Research 6.0

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Rosetta Studio International
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Canada
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Dave Homer, President
Software:
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RSI has developed the first presentation automation software tool that allows you to automate both tracking and ad hoc projects. Powerful, yet designed with ease of use in mind, Rosetta Studio allows you to populate existing documents or generate completely new ones. Research firms ranging from one-person shops to top 10 multinationals are using Rosetta Studio to slash their reporting times and improve accuracy.
(See advertisement on p. 75)

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Princeton, NJ 08540
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tony.bazerghi@roymorgan.com
www.roymorgan.com
Tony Bazerghi, General Manager
Software:
Asteroid

Salford Systems
4740 Murphy Canyon Rd., Suite 200
San Diego, CA 92123
Ph. 619-543-8880
info@salford-systems.com
www.salford-systems.com
Software:
CART
LOGIT
MARS
RandomForests
TreeNet

Sammamish Data Systems, Inc.
P.O. Box 70382
Bellevue, WA 98005-0382
Ph. 425-867-1485 ext. 2
sales@sammdata.com
www.sammdata.com
Bob Schweitzer
Software:
GeoSight
Postal Carrier Route Polygons
Zip + 2 Polygons
Zip + 4 Centroids
Zip Code Polygons

SAS Institute
100 SAS Campus Dr.
Cary, NC 27513-2414
Ph. 919-677-8000
software@sas.com
www.sas.com
Software:
SAS System

Sawtooth Software

Sawtooth Software, Inc.
530 W. Fir St.
Sequim, WA 98382-3209
Ph. 360-681-2300
info@sawtoothsoftware.com
www.sawtoothsoftware.com
Aaron Hill, Director of Client Services
Software:
ACA System
CBC System
CCA System
CPM System
CVA System
MaxDiff/Web
SSI Web

Sawtooth Software creates tools for online interviewing, conjoint/choice analysis, MaxDiff scaling, hierarchical Bayes (HB), perceptual mapping and cluster analysis. SSI Web is our platform for Web interviewing. We have three conjoint analysis packages: ACA (Adaptive Conjoint Analysis), CBC (Choice-Based Conjoint) and CVA (Traditional Conjoint). Our HB modules are suitable for ACA, CBC or general regression problems.
(See advertisement on this page)

Sawtooth Technologies, Inc.
1500 Skokie Blvd., Suite 510
Northbrook, IL 60062
Ph. 847-239-7300
info@sawtooth.com
www.sawtooth.com
Khong Godish, Tech. Sales Rep.
Software:
Sensus Web
WinCati
WinCATI Mixed Mode

Scantron
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Irvine, CA 92618
Ph. 949-639-7777 or 800-722-6876
www.scantron.com
Software:
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FLIPS
TELEform

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Bowling Green, OH 43402
Ph. 419-352-4371
info@senecio.com
www.senecio.com
Jerry Wicks, President
Software:
AskAnywhere
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IPSS

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3D VOG
iViewX

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Frank Bernacet
Software:
Customer Connect 360

Smart Software, Inc.
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Software:
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(See advertisement on this page)

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www.spectramarketing.com
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Spectra Enlighten
Spectra HispanIQ
Spectra InfiNet
VRPS

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Ph. 262-642-5929
springsys@worldnet.att.net
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Snap Express
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Statistical Innovations, Inc.
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info@statpac.com
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David Walonick, President
Software:
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StatPac Survey Software

StatSoft, Inc.
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info@statsoft.com
www.statsoft.com
Josh Coffey
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Software:
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Vancouver, BC V6B 2M1
Canada
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www.techneos.com
Software:
Entryware 6

TelAthena Systems LLC
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Brooklyn, NY 11220
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www.telathena.com
Software:
TelAthena

Tele Atlas
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Lebanon, NH 03766
Ph. 800-331-7881
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Software:
DynaMap/Census

TeleSage, Inc.
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Ph. 866-942-8849
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www.telesage.com
Howard Surette
Software:
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eQ
SendQ
SmartQ
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Tetrad Computer Applications, Inc.
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Bellingham, WA 98227-9754
Ph. 800-663-1334 or 360-734-3318
info@tetrad.com
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Wilson Baker, President
Software:
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MapPoint
PCensus
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Think Virtual Fieldwork
205 Worth Ave., Suite 201
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www.thinkvirtualfieldwork.com
Ray Benack, President
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(See advertisement on p. 3)

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Software:
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Toluna
419 Lafayette, 2nd Floor
New York, NY 10003
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www.toluna-group.com
Software:
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www.touchstarsoftware.com
Software:
eTelescipt
Telescript

Touchview Survey Solutions
1722 Selig Lane
Los Altos, CA 94024
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Joseph Salerno, Director
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QDA Data Analysis Software

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Rachael Krupek
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Qualboard

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Thomas Reeder, Vice President
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Software:
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(See advertisement on p. 17)

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Tony Weeks, Partner
Software:
U-Tab

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Jan Werner, Principal
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Software:
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Steven R. Lavine, President
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(See advertisement on p. 63)

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(See insert)

Tabulation Software	Operating System					Tabulation Features							Significance Tests				Purchasing	
Software Title/ Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
Answer Tree SPSS Inc., p. 87	●				●	Both	Var			●	●						Buy	$$
ARGUS Perceptual Mapper SPRING SYSTEMS, p. 87	●										●							
askiaanalyse ASKIA - Software for Surveys, p. 74	●					GUI	Unltd	Unltd	●	●	●		●		●			
askiavista ASKIA - Software for Surveys, p. 74						Both	Unltd	Unltd	●	●	●		●		●		Either	
Asteroid Roy Morgan International Ltd., p. 86																		
CART Salford Systems, p. 86	●		●	●		Both	8,192		●	●	●						Buy	$$
Claritas BusinessPoint Claritas Inc., p. 76					●	GUI			●	●	●	●					Either	$$$$
Clementine SPSS Inc., p. 87	●		●		●	Both	Unltd		●	●			●	●	●	●	Buy	$$$$
Community Coder ESRI, p. 78							Unltd.											
Confirmit Confirmit, p. 76	●				●	GUI			●	●	●	●						
ConsumerPoint Claritas Inc., p. 76	●					GUI			●	●	●	●					Lease	$$$$
CPM System Sawtooth Software, Inc., p. 86						GUI			●	●	●			●				
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 87					●	GUI			●	●	●	●	●					
Databeacon Databeacon Inc., p. 78					●	GUI												
Dub InterViewer NEBU b.v., p. 84	●			●	●	GUI	Unltd	Unltd	●	●	●	●	●				Lease	
East 4.0 Cytel Inc., p. 78																	Buy	$$
EFM Reporting Vovici Corporation, p. 89									●	●	●							
Eform Beach Tech Corporation, p. 74	●				●	Both	Unltd	Unltd	●	●	●	●		●	●	●	Either	
eListen Scantron, p. 86	●				●	GUI	Unltd	Unltd	●	●	●							
EQS Structural Equations Modeling Multivariate Software, Inc., p. 84	●		●	●		GUI			●	●	●		●	●	●	●	Either	$$
ESPRI Information Tools Ltd., p. 80	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Buy	$$

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

Tabulation Software	Operating System					Tabulation Features							Significance Tests				Purchasing	
Software Title/ Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
E-Tabs Interactive E-Tabs, p. 80	●	●			●	GUI			●	●	●	●				●	Lease	$$
E-Tabs Lite Reader E-Tabs, p. 80	●					GUI												
E-Tabs Web E-Tabs, p. 80	●		●			Both						●					Lease	$$$$
E-Tabs Writer E-Tabs, p. 80	●		●	●		GUI											Lease	$$$
EzMedia Plan New Age Media Systems, Inc., p. 84					●	GUI	Unltd	Unltd	●	●	●	●					Lease	$$$$
FASTAB Ad Hoc Tabulation DATAN, Inc., p. 78	●					GUI	32,000	Unltd	●	●	●						Lease	$
Flo - Stat Senecio Software, Inc., p. 86		●							●	●	●	●	●	●	●	●		
Forecast Pro Business Forecast Systems, p. 74	●					GUI	10	1	●		●						Buy	$
Forecast Pro Unlimited Business Forecast Systems, p. 74	●					Both	Unltd	Unltd	●	●	●		●		●		Buy	$$$$
Forecast Pro XE Business Forecast Systems, p. 74	●					GUI	100	1	●	●	●		●		●		Buy	$$$
GeoSight Sammamish Data Systems, Inc., p. 86	●					GUI	Unltd	Unltd	●	●	●						Buy	$
Goldminer® Statistical Innovations, Inc., p. 87	●					GUI				●	●		●	●		●	Buy	$$
HARMONI Information Tools Ltd., p. 80	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Buy	$$$
Hosted Survey Hostedware, p. 80					●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	
IdeaMap®.Net Moskowitz Jacobs Inc., p. 84					●	GUI					●	●						
ImagEntry Viking Software Solutions, p. 88	●		●	●		GUI	32,000	32,000									Buy	$$
iMARK Online Claritas Inc., p. 76					●	GUI			●		●	●					Lease	$$$$
Impact! Analysis Pattern Discovery, Inc., p. 84																	Lease	
Inter.DEA™ PORTAL Intergam Online, p. 81					●	GUI			●	●	●	●	●	●	●	●		
Internet Survey Machine Marketing Masters, p. 82	●	●	●	●	●	GUI	32,000	Unltd									Buy	$$$$
Interview & Analysis Program Comstat Research Corporation, p. 76																		

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
Ioxphere Xorbix Technologies, Inc., p. 89	●	●			●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$
iXPRESS Claritas Inc., p. 76	●					GUI			●		●	●					Lease	$$$
KMRQuest KMR Group, p. 82	●												●				Lease	
Latent Gold® Statistical Innovations, Inc., p. 87	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Buy	$$
Latent Gold® Choice Statistical Innovations, Inc., p. 87	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Lease	$$$
LogXact Cytel Inc., p. 78																	Buy	$
MarketSight® MarketSight LLC, p. 84	●				●	GUI	10,000	Unltd	●	●	●	●	●	●	●	●	Either	$$
MARS Salford Systems, p. 86	●		●	●			8,192		●	●	●						Buy	$$$$
MENTOR CfMC Research Software, p. 76	●		●	●		Syntax	Unltd	Unltd	●	●	●	●	●		●	●	Lease	
MERLIN Tabulation System DATAN, Inc., p. 78	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$$
MERLINPlus (plus menus) DATAN, Inc., p. 78	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$
Microtab Version 7 - Professional Edition Microtab, Inc., p. 84	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$$
Microtab Version 7 - Standard Edition Microtab, Inc., p. 84	●					GUI	Unltd	Unltd	●			●					Buy	$$
Microtab Version 7 SPSS Add-on Module Microtab, Inc., p. 84	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$
MktSIM SPRING SYSTEMS, p. 87	●										●							
MM4XL 7.0 MarketingStat, p. 82	●					GUI	200	Unltd	●	●	●	●	●	●	●	●	Buy	$$
Modern360 Feedback Modern Survey, Inc., p. 84																		
mr Studio SPSS Inc., p. 87	●					Both			●	●		●					Either	$$
mr Tables SPSS Inc., p. 87	●				●	Both				●		●	●		●		Buy	$$$$
MRDCL Marketing and Research Data Consultants, p. 82	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$$$
mTAB Research Analysis System PAI-Productive Access, Inc., p. 84	●				●	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
NCSS Dataxiom Software, Inc., p. 78	●					GUI	250	Var	●	●	●		●	●	●	●	Buy	$
NCSS NCSS, p. 84	●					GUI	1,000	Unltd	●		●		●	●	●	●	Buy	$
NIPO DIANA NIPO Software, p. 84	●				●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Lease	$$$
OnTraq Marketing and Research Data Consultants, p. 82	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$
PASS Dataxiom Software, Inc., p. 78	●					GUI											Buy	
PEER Forecaster Delphus, Inc., p. 78	●					GUI			●					●	●		Either	$
PEER Planner for Windows Delphus, Inc., p. 78	●					GUI			●	●	●	●	●	●	●	●	Either	$$$$
Postal Carrier Route Polygons Sammamish Data Systems, Inc., p. 86	●						Unltd	Unltd	●	●	●						Buy	$
Power & Precision Dataxiom Software, Inc., p. 78	●					GUI											Buy	$$
PrimeLocation Claritas Inc., p. 76	●					GUI			●	●	●	●					Lease	$$$$
P-STAT P-STAT, Inc., p. 85	●		●	●		Both	250,000	Unltd	●	●	●	●	●	●	●		Buy	$$
Pulsar/Pulsar Web Pulse Train Ltd., p. 85	●					GUI	Unltd	Unltd	●	●	●	●	●		●	●	Either	$$$
QDA Data Analysis Software Tragon, p. 88	●					GUI	100				●			●			Buy	$$$$
QPSMR CATI QPSMR Limited, p. 85	●					Both	30,000	30,000	●	●		●	●	●	●	●	Lease	$$$$
QPSMR INSIGHT QPSMR Limited, p. 85	●					Both	30,000	30,000	●	●		●	●	●	●	●	Lease	$$
QPSMR REFLECT QPSMR Limited, p. 85	●					Both	30,000	30,000	●	●		●	●	●	●	●		
QPSMR SOLO QPSMR Limited, p. 85	●					Both	30,000	30,000	●	●		●	●	●	●		Buy	$$
QTAB Jan Werner Data Processing, p. 89	●			●		Syntax	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$$
Quantum SPSS Inc., p. 87							Unltd	Unltd	●	●			●		●	●	Buy	$$$$
Quanvert SPSS Inc., p. 87	●					GUI		Var	●	●					●		Buy	$$
QuestionPro QuestionPro.com, p. 85					●	GUI	Unltd	Unltd	●			●	●		●		Either	$$

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
QWRITERII for Windows Your Perceptions, Inc., p. 89	●					GUI	2,000	200			●						Lease	$
RandomForests Salford Systems, p. 86	●		●			Both	8,192		●	●	●						Buy	
Raosoft EZReport Raosoft, Inc., p. 85	●					Both	Unltd	Unltd	●	●	●		●	●	●	●	Buy	$
Raosoft SurveyWin Raosoft, Inc., p. 85	●					GUI	Unltd	Unltd	●	●			●	●	●	●	Buy	$
Rosetta Studio Rosetta Studio International, p. 86	●					GUI		Unltd			●						Either	$$$$
Sensus Web Sawtooth Technologies, Inc., p. 86	●					Both	Unltd	Unltd	●			●					Buy	
Si-CHAID® Statistical Innovations, Inc., p. 87	●					GUI	Unltd	Unltd		●	●		●				Buy	$$
SmartForecasts® Smart Software, Inc., p. 87	●					GUI	Unltd		●	●	●	●	●	●	●	●	Either	$$$$
SNAP Internet Snap Surveys, Ltd., p. 87	●					GUI	Unltd	Unltd	●	●		●	●		●	●	Buy	
SNAP Professional Snap Surveys, Ltd., p. 87	●					GUI	Unltd	Unltd	●	●	●	●	●		●	●	Buy	
SNAP Results Snap Surveys, Ltd., p. 87	●					Both	Unltd	Unltd	●	●	●	●	●		●	●		
SNAP Scanning Snap Surveys, Ltd., p. 87	●					GUI	Unltd	Unltd	●	●		●	●		●	●	Buy	
SOLAS Dataxiom Software, Inc., p. 78	●					GUI												
SPSS Text Analysis for Surveys SPSS Inc., p. 87	●					GUI											Buy	$$
Star Pulse Train Ltd., p. 85	●					Both	Unltd	Unltd	●	●					●	●	Either	$$
STAT XP VOXCO (Groupe Voxco Inc.), p. 89	●					Both	10,000	Unltd	●	●	●	●	●		●	●	Buy	$$$$
Stata StataCorp LP, p. 87	●	●	●	●		Both											Either	$$$
STATISTICA 6 StatSoft, Inc., p. 87	●				●	Both	Var	Var	●	●	●		●	●	●	●	Buy	
STATISTICA 7 StatSoft, Inc., p. 87	●					Both	Var	Var	●	●	●		●	●	●	●	Buy	
StatMost Dataxiom Software, Inc., p. 78	●					GUI	250	Var	●		●		●	●	●	●	Buy	$
StatPac Survey Software StatPac, Inc., p. 87	●					Syntax	2,000	Unltd	●	●	●	●	●	●	●	●	Buy	$$

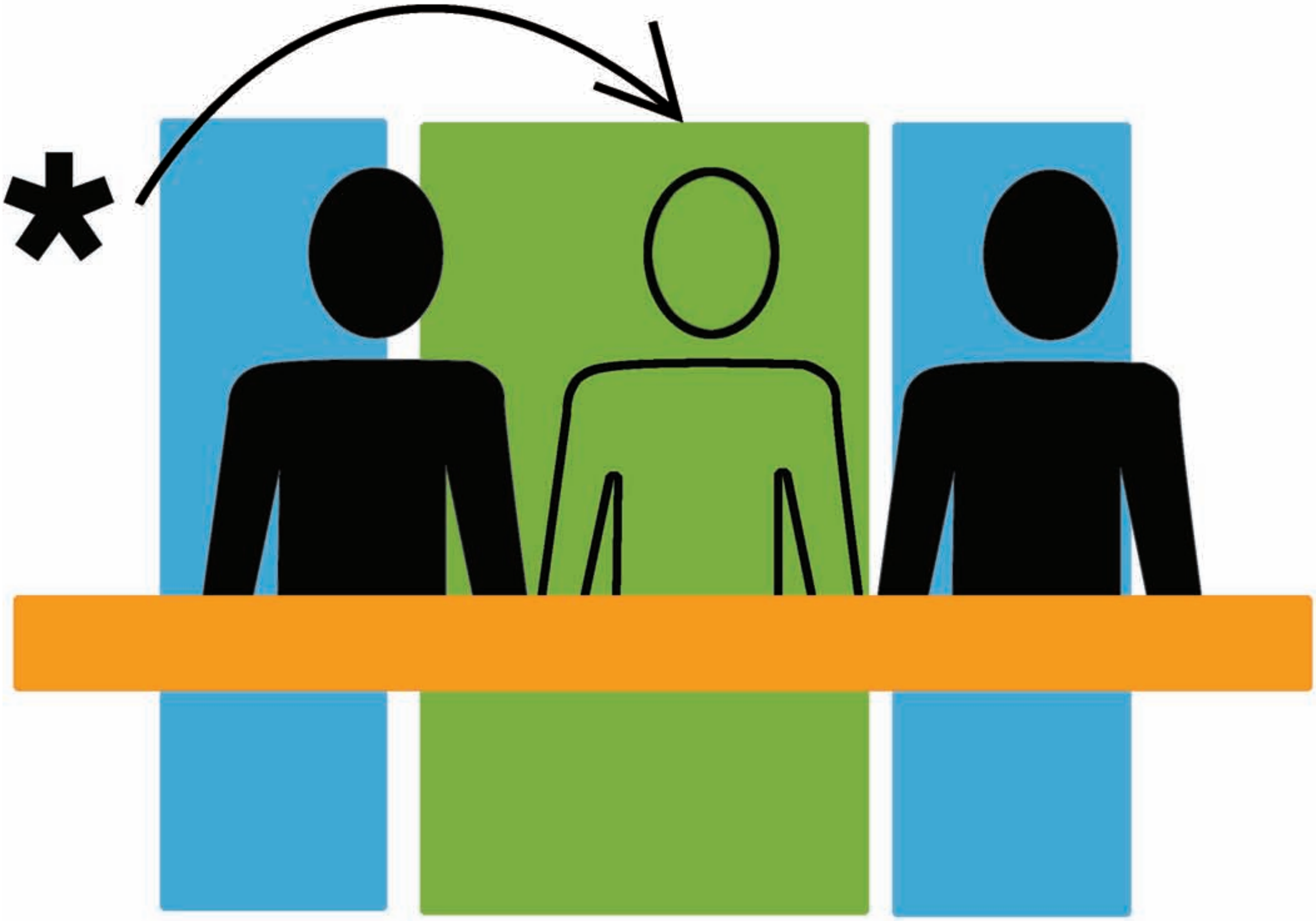
$ = $0-$500 $$ = $501-$1500 $$$ = $1501-$2500 $$$$ = $2500+

Tabulation Software

Software Title/ Company/Listing page #	Operating System: Win	Mac	Unix	Linux	Web	Tabulation Features: Graphic User Interface or Script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Significance Tests: Chi-Square	F-Test	T-Test	Z-Test	Purchasing: Buy or Lease	Price Range
STATS Decision Analyst, Inc., p. 78	●					GUI				●			●					
StatXact Cytel Inc., p. 78																	Buy	$$
StatXact Procs for SAS Users Cytel Inc., p. 78																	Buy	$$
StyleMap®.Net Moskowitz Jacobs Inc., p. 84					●	GUI					●	●						
SuperCROSS Alta Plana Corporation, p. 72	●					GUI	Unltd	Unltd	●	●	●	●	●					
SuperSTAR Alta Plana Corporation, p. 72	●		●	●		Both	Unltd	Unltd	●	●	●	●					Either	
Survey Creator Common Knowledge Research Services, p. 76					●	Both			●						●	●		
Survey Creator Your2Cents Online Opinion Panel, p. 89					●	Both			●		●				●	●		
Survey Explorer Memphis International, p. 84	●					GUI	Unltd	Unltd	●	●			●					
Survey Said Enterprise Edition Marketing Masters, p. 82	●				●	GUI											Buy	
Survey Select Expert SurveyConnect, Inc., p. 88	●					GUI	Unltd	Unltd			●	●					Buy	$$
SurveyPro Apian Software, p. 72	●					GUI	3,000	3,000	●	●	●	●	●				Buy	$$
Sysurvey.com SySurvey, p. 88					●	GUI			●		●	●					Lease	
TabRight RDA Group, p. 85									●	●	●							
TestKit Hexworx Computer Services P/L, p. 80	●		●	●	●	Both	Unltd	Unltd	●	●	●	●			●	●	Buy	$
The Survey Cybernetic Solutions - The Survey Software, p. 78	●					GUI	1,000	32,000	●	●	●		●	●	●	●	Buy	$
The Survey System - Web Creative Research Systems, p. 78	●					GUI	32000	1000	●	●		●	●	●	●	●		$$
The Survey System (Version 9.5) Creative Research Systems, p. 78	●					GUI	32,000	5,000	●	●		●	●	●	●	●		$$
The Unscrambler CAMO Smart Software Inc., p. 76	●					GUI	Unltd	Unltd	●	●	●			●	●	●		
The Unscrambler Designer CAMO Smart Software Inc., p. 76	●					GUI	Unltd	Unltd	●	●	●			●	●	●		
TPL Tables QQQ Software, Inc., p. 85	●		●	●		Both	Unltd	Unltd	●	●		●					Buy	$$

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. 86	●		●	●		Both	8,192		●	●	●						Buy	$$$$
Trial Map SPRING SYSTEMS, p. 87	●										●							
Turbo Spring-Stat SPRING SYSTEMS, p. 87	●										●		●	●	●	●		
UNCLE Professional The Uncle Group, Inc., p. 88	●					Both	65,534	9,999	●	●	●		●		●		Buy	$$$$
Uncle Reports The Uncle Group, Inc., p. 88	●					GUI	9,999		●	●								$
UNCLE Standard The Uncle Group, Inc., p. 88	●					Both	65,534	9,999	●	●	●		●		●		Buy	$$$$
U-Tab Weeks Computing Services, p. 89	●					GUI	Unltd	Unltd	●	●	●	●	●	●	●		Buy	$
VDE Viking Software Solutions, p. 88	●		●	●		GUI	32,000	32,000									Either	$$
VDE+Images Viking Software Solutions, p. 88	●		●	●		GUI	32,000	32,000									Buy	$$
Vector Cobalt Sky Limited, p. 76					●	GUI	Unltd	Unltd	●	●	●	●				●	Lease	$$$$
VOXCO Tab VOXCO (Groupe Voxco Inc.), p. 89	●					GUI	Unltd	Untld	●	●		●	●		●		Either	
Walker Smart Loyalty® System Walker Information, p. 89	●		●		●	Both			●	●	●	●			●		Lease	$$$$
WesVar Westat, p. 89	●					GUI	Unltd	Unltd	●	●	●		●	●	●	●		
WinCati Sawtooth Technologies, Inc., p. 86	●					Both	Unltd	Unltd	●			●					Buy	
WinCATI Mixed Mode Sawtooth Technologies, Inc., p. 86	●					Both	Unltd	Unltd	●			●					Buy	
WinCross The Analytical Group, Inc., p. 72	●					Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$$
XPro Dataxiom Software, Inc., p. 78	●					GUI	250	Var	●	●	●		●	●	●	●	Buy	$
Zip + 2 Polygons Sammamish Data Systems, Inc., p. 86	●						Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$
Zip + 4 Centroids Sammamish Data Systems, Inc., p. 86	●						Unltd	Unltd	●	●	●						Buy	
Zip Code Polygons Sammamish Data Systems, Inc., p. 86	●						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. 86	●				●	GUI	●	●	●	●	●			●	●	●	●		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 80	●	●	●	●	●	Both	●			●					●			Either	
AskAnywhere Senecio Software, Inc., p. 86	●	●	●	●	●	GUI	●	●		●	●				●			Lease	$$
Bellview Fusion Pulse Train Ltd., p. 85	●					Both			●	●				●		●		Either	$
Blaise Westat, p. 89	●					GUI	●	●	●	●								Buy	
CBC System Sawtooth Software, Inc., p. 86	●				●	GUI	●	●	●	●	●	●		●	●	●	●		
Checkbox Mobile Survey Prezza Technologies, Inc., p. 85	●					GUI				●				●					
Confirmit Confirmit, p. 76	●				●	GUI	●	●	●	●		●		●	●	●	●		
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 87					●	GUI				●	●	●	●	●	●	●	●		
Cutom Panel Building Itracks, p. 81					●	GUI			●	●				●	●	●	●		
CVA System Sawtooth Software, Inc., p. 86	●					GUI	●	●	●			●		●	●	●	●		
Decipher Decipher, Inc., p. 78					●	GUI	●	●	●	●	●				●	●	●	Lease	
Dub InterViewer NEBU b.v., p. 84	●			●	●	GUI	●	●	●	●					●	●		Lease	
Eform Beach Tech Corporation, p. 74	●				●	Both			●	●	●		●	●	●	●	●	Either	
EFS-Panel Globalpark US, p. 80					●	Both				●		●	●		●	●		Lease	$$$$
EFS-Survey Globalpark US, p. 80					●	GUI	●			●		●						Lease	$$$$
Hosted Survey Hostedware, p. 80					●	Both	●			●	●	●		●	●	●	●	Either	
Interviewer VOXCO (Groupe Voxco Inc.), p. 89	●				●	Both	●	●	●	●				●	●	●		Either	$$
IT CATI/CAPI/Web Interview Technology, p. 81	●				●	Both	●		●	●					●			Buy	$$$$
Itracks Online CATI Itracks, p. 81					●	Both			●	●				●	●	●	●		
Itracks Online Surveys Itracks, p. 81					●	Both				●				●	●	●	●		
MaxDiff/Web Sawtooth Software, Inc., p. 86	●				●	GUI	●	●	●	●	●	●							$$$
Mobile Surveys Itracks, p. 81					●	Both				●	●			●	●	●	●		
MR Interview SPSS Inc., p. 87	●				●	Both	●	●	●	●				●	●	●	●	Either	$$$$

$ = $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
NET-MR Suite GMI (Global Market Insite, Inc.), p. 80	●		●	●	●	GUI	●		●	●				●	●	●	●		
NIPO Fieldwork System NIPO Software, p. 84	●					Both	●	●	●	●	●	●		●	●	●	●	Lease	$$
Online Focus Groups Itracks, p. 81					●	GUI				●				●	●	●	●		
Pulse DNA Software Suite Pulse Group, p. 85	●			●	●	Both	●	●	●	●	●	●	●	●	●	●	●	Either	
QPSMR CATI QPSMR Limited, p. 85	●					Both	●	●	●		●	●		●	●	●		Lease	$$$$
QPSMR INSIGHT QPSMR Limited, p. 85	●					Both	●				●	●		●	●	●		Lease	$$
Qualmetrix Itracks, p. 81					●	GUI				●					●		●		
Quanquest SPSS Inc., p. 87	●					GUI	●		●	●		●	●	●				Buy	$$
Raosoft EZSurvey Raosoft, Inc., p. 85	●				●	Both	●	●	●	●	●	●		●				Buy	$
Raosoft SurveyWin Raosoft, Inc., p. 85	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$
Results for Research 6.0 RONIN Corporation, p. 85	●				●	Both	●	●	●	●								Buy	
SNAP Professional Snap Surveys, Ltd., p. 87	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	
SSI Web Sawtooth Software, Inc., p. 86	●				●	Both	●	●	●	●	●	●		●	●	●	●		
StatPac Survey Software StatPac, Inc., p. 87	●					Syntax			●	●	●	●		●	●	●	●	Buy	$$
Survey Genie William Steinberg Consultants, Inc., p. 87	●					GUI				●	●	●		●	●	●	●	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 87	●					GUI		●		●	●	●		●	●	●	●	Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 82	●				●	GUI			●	●	●	●	●	●				Buy	
Survey Tools For Windows William Steinberg Consultants, Inc., p. 87	●					GUI		●		●	●	●		●	●	●	●	Buy	$
SurveyPro Apian Software, p. 72	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$$
Sysurvey.com SySurvey, p. 88					●	GUI			●	●	●				●	●	●	Lease	
The Survey Cybernetic Solutions - The Survey Software, p. 78	●					GUI				●	●	●		●	●	●	●	Buy	$
The Survey System (Version 9.5) Creative Research Systems, p. 78	●					GUI	●	●	●	●	●	●	●	●	●	●	●		$$
Virtual Call Center Network Itracks, p. 81					●	GUI			●	●					●	●	●		
Voxco Command Center VOXCO (Groupe Voxco Inc.), p. 89					●	GUI	●	●	●	●		●	●	●	●	●		Either	
WinCATI Mixed Mode Sawtooth Technologies, Inc., p. 86	●					Both			●	●					●	●	●	Buy	

Paper-Based/Scan Survey Software	Operating System			Design Tool	Scan Types					Features	Purchasing	
Software Title/ Company/Listing page #	Win	Linux	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. 85	●			Both	●	●	●	●	●	Add-on	Either	$$$$
Confirmit Confirmit, p. 76	●		●	GUI						Yes		
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 87			●	GUI		●				Yes		
Eform Beach Tech Corporation, p. 74	●		●	Both		●	●			Yes	Either	
EFS-Panel Globalpark US, p. 80			●	Both	●						Lease	$$$$
EFS-Survey Globalpark US, p. 80			●	GUI	●						Lease	$$$$
ExpertScan AutoData Systems, p. 74	●			GUI		●	●	●	●	Yes	Buy	$$$
FAQSS Optimum Solutions Corp., p. 84	●			GUI	●	●	●	●	●	Yes	Lease	$$$$
FLIPS Scantron, p. 86	●				●	●	●					
Inquisite Survey System Inquisite Inc., p. 80	●		●	GUI		●				Yes	Either	$$$$
Pulse DNA Software Suite Pulse Group, p. 85	●	●	●	Both	●			●			Either	
Raosoft SurveyWin Raosoft, Inc., p. 85	●			GUI	●	●				Yes	Buy	$
ReadSoft Documents for Forms ReadSoft, Inc., p. 85	●			GUI	●	●	●	●	●	Add-on	Buy	$$$$
Remark Classic OMR Gravic, Inc. - Remark Products Group, p. 80	●			GUI		●	●	●		Yes	Buy	$
Remark Office OMR Gravic, Inc. - Remark Products Group, p. 80	●			GUI		●	●			Yes	Buy	$$
Scannable Office AutoData Systems, p. 74	●			GUI	●	●	●	●	●	No	Buy	$$$$
SNAP Professional Snap Surveys, Ltd., p. 87	●			GUI	●	●		●	●	Yes	Buy	
SNAP Scanning Snap Surveys, Ltd., p. 87	●			GUI	●	●		●	●	Yes	Buy	
Survey Genie William Steinberg Consultants, Inc., p. 87	●			GUI						Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 87	●			GUI						Yes	Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 82	●		●	GUI	●	●				Yes	Buy	
Survey Select Expert SurveyConnect, Inc., p. 88	●			GUI						Yes	Buy	$$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 87	●			GUI						Yes	Buy	$
SurveyPro Apian Software, p. 72	●			GUI		●	●			Yes	Buy	$$
TELEform Scantron, p. 86	●				●			●	●			
The Survey System (Version 9.5) Creative Research Systems, p. 78	●			GUI		●				Yes		$$

$ = $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
Abase Advanced Data Research, Inc., p. 72	●					●	●	●		Both	●	●	●	Yes	Buy	$$$$
ACA System Sawtooth Software, Inc., p. 86	●				●	●	●			GUI	●	●	●	Yes		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 80	●	●	●	●	●	●	●			Both	●	●	●	Yes	Either	
AskAnywhere Senecio Software, Inc., p. 86	●	●	●	●	●	●	●	●		GUI	●	●	●	Yes	Lease	$$
askiaface ASKIA - Software for Surveys, p. 74	●					●				Both	●	●	●		Either	
askiafacemobile ASKIA - Software for Surveys, p. 74	●						●			Both	●	●	●		Either	
Bellview CAPI Pulse Train Ltd., p. 85	●					●				Both	●	●	●	Add-on	Either	$
CBC System Sawtooth Software, Inc., p. 86	●				●	●	●			GUI	●	●	●	Yes		
Checkbox Mobile Survey Prezza Technologies, Inc., p. 85	●						●			GUI						
Confirmit Confirmit, p. 76	●				●					GUI						
CONVERSO CAPI CONVERSOFT (Axiom Software), p. 76	●					●	●	●		Both	●	●	●	Yes	Either	
CONVERSO CASI CONVERSOFT (Axiom Software), p. 76	●					●	●	●		Both	●	●	●		Either	
CONVERSO Pocket/Mobile CONVERSOFT (Axiom Software), p. 76	●						●	●		Both	●	●		Yes	Either	
CVA System Sawtooth Software, Inc., p. 86	●					●	●			GUI	●	●	●	Yes		
Digivey Survey Suite™ Creoso Corporation, p. 78	●					●	●	●		GUI	●	●	●	Yes	Either	$$
Dub InterViewer NEBU b.v., p. 84	●			●	●	●	●	●		GUI	●	●	●	Add-on	Lease	
Eform Beach Tech Corporation, p. 74	●				●	●			●	Both	●	●		Yes	Either	
EFS-Panel Globalpark US, p. 80					●		●			Both					Lease	$$$$
EFS-Survey Globalpark US, p. 80					●		●			GUI					Lease	$$$$
Empathica Customer Experience Mgmt. System Empathica Inc., p. 78					●				●					Yes	Buy	$$$$
Entryware SPSS Inc., p. 87	●						●			GUI				Yes	Buy	$$
Entryware 6 Techneos Systems Inc., p. 88	●				●	●	●			Both	●	●	●	No	Either	$$
ForSurveys Forall Systems, Inc., p. 80					●		●			GUI		●		No	Lease	$$
Hosted Survey Hostedware, p. 80					●		●	●		Both	●	●	●	Add-on	Either	
Interview & Analysis Program Comstat Research Corporation, p. 76																
Interviewer CAPI VOXCO (Groupe Voxco Inc.), p. 89	●				●	●	●	●	●	Both	●	●	●	Yes	Either	$$
IT CATI/CAPI/Web Interview Technology, p. 81	●				●					Both				Yes	Buy	$$$$

CAPI/CASI Software	Operating System					Platform				Design Tool	CAPI/CASI Features				Purchasing	
Software Title/ Company/Listing page #	Win	Mac	Unix	Linux	Web	Desktop	Handheld	Touchscreen	IVR	Graphic User Interface or Script	Audio	Still Images	Video	Tabulation Analysis Tools	Buy or Lease	Price Range
MaxDiff/Web Sawtooth Software, Inc., p. 86	●				●	●	●			GUI				Yes		$$$
NIPO CAPI System NIPO Software, p. 84	●					●	●	●		Both	●	●	●	Add-on	Lease	$$$$
QPSMR CATI QPSMR Limited, p. 85	●					●	●			Both	●	●	●	Yes	Lease	$$$$
QPSMR INPUT QPSMR Limited, p. 85	●					●				GUI		●	●	No		
QPSMR INSIGHT QPSMR Limited, p. 85	●					●	●			Both		●	●	Yes	Lease	$$
Raosoft EZSurvey Raosoft, Inc., p. 85	●				●	●	●	●		Both	●	●	●	Yes	Buy	$
Raosoft InterForm Raosoft, Inc., p. 85	●				●	●				GUI	●	●	●	Yes	Buy	
Raosoft SurveyWin Raosoft, Inc., p. 85	●					●		●		GUI		●		Add-on	Buy	$
Reform Anyware Mobile Solutions, p. 72					●		●		●	GUI	●	●		Yes		
Reply Fleetwood Group, Inc., p. 80	●	●				●				GUI	●	●	●	No		
Results for Research 6.0 RONIN Corporation, p. 85	●				●	●	●	●		Both	●	●	●	Yes	Buy	
SmartQ TeleSage, Inc., p. 88	●								●	GUI	●			Add-on	Buy	$$$$
SNAP Professional Snap Surveys, Ltd., p. 87	●					●	●	●		GUI	●	●	●	Yes	Buy	
SSI Web Sawtooth Software, Inc., p. 86	●				●	●	●			Both	●	●	●	Yes		
SURVENT CfMC Research Software, p. 76	●		●	●	●	●				Syntax	●			Yes	Lease	
Survey Creator Common Knowledge Research Services, p. 76					●	●	●			Both	●	●	●	Yes		
Survey Creator Your2Cents Online Opinion Panel, p. 89					●	●	●			Both	●	●	●	Yes		
Survey Genie William Steinberg Consultants, Inc., p. 87	●					●				GUI				Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 87	●					●				GUI				Yes	Buy	$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 87	●					●				GUI				Yes	Buy	$
SurveyPro Apian Software, p. 72	●					●		●		GUI		●		Yes	Buy	$$
The Survey System - CATI Creative Research Systems, p. 78	●					●				GUI	●	●	●	Yes		$$$
The Survey System - PDA Creative Research Systems, p. 78	●						●							No	Buy	$
The Survey System (Version 9.5) Creative Research Systems, p. 78	●					●	●	●		GUI	●	●	●	Yes		$$
Touchview Survey Solution Touchview Survey Solutions, p. 88	●						●	●								
WinQuery The Analytical Group, Inc., p. 72	●					●		●		Both	●	●	●	Yes	Buy	$

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

CATI Software	Operating System					Design Tool	CATI Features			Purchasing	
Software Title/ Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	Central Management	Predictive Dialing	Tabulation Analysis Tools	Buy or Lease	Price Range
askiavoice ASKIA - Software for Surveys, p. 74	●					Both	●	●	Yes		
Bellview CATI Pulse Train Ltd., p. 85	●					Both	●	●	Add-on	Either	$
Confirmit Confirmit, p. 76	●				●	GUI	●		Yes		
CONVERSO CATI CONVERSOFT (Axiom Software), p. 76	●					Both	●	●	Yes	Either	
Dub InterViewer NEBU b.v., p. 84	●			●	●	GUI	●	●	Yes	Lease	
Eform Beach Tech Corporation, p. 74	●				●	Both			Yes	Either	
Interview & Analysis Program Comstat Research Corporation, p. 76											
Interviewer CATI VOXCO (Groupe Voxco Inc.), p. 89	●				●	Both	●	●	Yes	Either	$$
Interviewer VCC (Virtual Call Ctr.) VOXCO (Groupe Voxco Inc.), p. 89	●				●	Both	●	●	Yes	Either	$$
Ioxphere Xorbix Technologies, Inc., p. 89	●	●			●	GUI	●	●	Yes	Either	$$
IT CATI/CAPI/Web Interview Technology, p. 81	●				●	Both			Yes	Buy	$$$$
Itracks Online CATI Itracks, p. 81					●	Both	●	●	Yes		
NIPO Fieldwork System for CATI NIPO Software, p. 84	●					Both	●	●	Add-on	Lease	$$$$
Pulse DNA Software Suite Pulse Group, p. 85	●			●	●	Both				Either	
QPSMR CATI QPSMR Limited, p. 85	●					Both	●	●	Yes	Lease	$$$$
Quancept CATI SPSS Inc., p. 87			●			GUI	●	●		Either	$$$$
Raosoft EZSurvey Raosoft, Inc., p. 85	●				●	Both	●		Add-on	Buy	$

CATI Software	Operating System					Design Tool	CATI Features			Purchasing	
Software Title/ Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	Central Management	Predictive Dialing	Tabulation Analysis Tools	Buy or Lease	Price Range
Raosoft InterForm Raosoft, Inc., p. 85	●				●	GUI	●		Add-on	Buy	
Raosoft SurveyWin Raosoft, Inc., p. 85	●					GUI	●		Add-on	Buy	$
Results for Research 6.0 RONIN Corporation, p. 85	●				●	Both	●	●	Yes	Buy	
SNAP Professional Snap Surveys, Ltd., p. 87	●					GUI			Yes	Buy	
StatPac Survey Software StatPac, Inc., p. 87	●					Syntax			Yes	Buy	$$
SURVENT CfMC Research Software, p. 76	●		●	●	●	Syntax	●	●	Yes	Lease	
Survey Said Enterprise Edition Marketing Masters, p. 82	●				●	GUI				Buy	
SurveyPro Apian Software, p. 72	●					GUI			Yes	Buy	$$
Sysurvey.com SySurvey, p. 88					●	GUI			Yes	Lease	
TelAthena TelAthena Systems LLC, p. 88											
Telescript Touchstar Software, p. 88	●				●	GUI		●	Add-on	Buy	
The Survey Cybernetic Solutions - The Survey Software, p. 78	●					GUI	●		Yes	Buy	$
The Survey System - CATI Creative Research Systems, p. 78	●					GUI	●		Yes		$$$
The Survey System (Version 9.5) Creative Research Systems, p. 78	●					GUI	●		Yes		$$
Virtual Call Center Network Itracks, p. 81					●	GUI	●	●	Yes		
webCATI CfMC Research Software, p. 76	●			●	●	Both	●	●	Yes		
WinCati Sawtooth Technologies, Inc., p. 86	●					Both	●	●	Yes	Buy	
WinQuery The Analytical Group, Inc., p. 72	●					Both	●	●	Yes	Buy	$

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

Web Interviewing Software Solutions	Operating System					Design Tool	Web Interviewing Features					Purchasing	
Software Title/ Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	Data Collection (Web or E-mail)	Web Security	Quota Control	Tabulation & Analysis Tools	Real-Time Reports	Buy or Lease	Price Range
ACA System **Sawtooth Software, Inc., p. 86**	●				●	GUI	Web	●	●	Yes	●		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 80	●	●	●	●	●	Both	Web	●	●	Yes	●	Either	
ARCS® ARCS® IVR Systems, p. 74	●					GUI	Web	●	●	No	●	Either	$$$$
AskAnywhere Senecio Software, Inc., p. 86	●	●	●	●	●	GUI	Both	●	●	Yes	●	Lease	$$
askiaweb ASKIA - Software for Surveys, p. 74	●					GUI	Both	●	●	Yes	●		
AttentionTracking MediaAnalyzer Software & Research, Inc., p. 84	●				●	GUI	Web	●	●	Yes	●	Lease	
BayaSoft Custom Development BayaSoft LLC, p. 74					●		Both	●	●	Yes		Lease	
BayaSoft RTD - Real Time Data BayaSoft LLC, p. 74					●		Both	●	●	Yes	●	Lease	
BayaSoft RTR - Real Time Reporting BayaSoft LLC, p. 74					●		Both	●	●	Yes	●	Lease	
BayaSoft SMS - Sample Management Service BayaSoft LLC, p. 74					●		Both	●	●	Yes	●	Lease	
Bellview Web Pulse Train Ltd., p. 85	●					Both	Web	●	●	Add-on	●	Either	$$$$
Bulletin Board Focus Groups Itracks, p. 81					●	GUI	Web	●	●	Yes	●		
CBC System Sawtooth Software, Inc., p. 86	●				●	GUI	Web	●	●	Yes	●		
Checkbox Mobile Survey Prezza Technologies, Inc., p. 85	●					GUI	Web			Yes			
Checkbox Survey Prezza Technologies, Inc., p. 85	●					GUI	Both	●	●	Yes	●	Either	$$
Clipstream™ Video MR Clipstream™, p. 76	●		●	●	●	GUI	Web			No		Either	$$
Confirmit Confirmit, p. 76	●				●	GUI	Both	●	●	Yes	●		
CONVERSO CAWI CONVERSOFT (Axiom Software), p. 76	●					Both	Web	●	●	Yes	●	Either	
CONVERSO Enterprise CONVERSOFT (Axiom Software), p. 76					●		Web						
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 87					●	GUI	Web	●	●	Yes	●		
Cutom Panel Building Itracks, p. 81					●	GUI	Web	●	●	Yes	●		
CVA System Sawtooth Software, Inc., p. 86	●					GUI		●					
Dub InterViewer NEBU b.v., p. 84	●			●	●	GUI	Web	●	●	Add-on		Lease	
EFM Feedback Vovici Corporation, p. 89					●	GUI	Both	●	●	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
Eform Beach Tech Corporation, p. 74	●				●	Both		●	●	Yes		Either	
EFS-Panel Globalpark US, p. 80					●	Both	Web	●	●	Yes	●	Lease	$$$$
EFS-Survey Globalpark US, p. 80					●	GUI	Web	●	●	Yes	●	Lease	$$$$
Empathica Customer Experience Mgmt. System Empathica Inc., p. 78					●		Web	●	●	Yes	●	Buy	$$$$
eQ TeleSage, Inc., p. 88	●					GUI	Both	●	●	Add-on	●	Lease	$$$
eTelescipt Touchstar Software, p. 88					●	GUI	Web	●			●	Buy	
Eval Builder Your Perceptions, Inc., p. 89	●				●	Both	Both	●		Yes	●	Lease	
Fusion Vision Critical, p. 89					●	GUI	Web	●		Yes	●	Lease	
Hosted Survey Hostedware, p. 80					●	Both	Both	●	●	Add-on	●	Either	
Hosterd Survey Lite Hostedware, p. 80					●		Web						
IdeaMap®.Net Moskowitz Jacobs Inc., p. 84					●	GUI	Web	●	●	Yes	●		
Inquisite Survey System Inquisite Inc., p. 80	●				●	GUI	Web	●	●	Yes	●	Either	$$$$
Intellisurvey Intellisurvey, Inc., p. 81					●	Both	Web	●	●	Yes	●		
Internet Research Manager Domestic Data, p. 78	●					GUI	Both	●	●	No	●	Lease	$$$$
Internet Survey Machine Marketing Masters, p. 82	●	●	●	●	●	GUI	Web	●		Yes	●	Buy	$$$$
Interview & Analysis Program Comstat Research Corporation, p. 76													
Interviewer Web VOXCO (Groupe Voxco Inc.), p. 89	●					Both	Web	●	●	Yes	●	Either	$$
Ioxphere Xorbix Technologies, Inc., p. 89	●	●			●	GUI	Both	●	●	Yes	●	Either	$$
IT CATI/CAPI/Web Interview Technology, p. 81	●				●	Both				Yes		Buy	$$$$
Itracks Online Surveys Itracks, p. 81					●	Both	Web	●	●	Yes	●		
IVIS Resource Systems Group, Inc., p. 85						GUI	Both	●	●		●	Either	
Kinesis Survey Kinesis Survey Technologies, LLC, p. 82				●	●	GUI	Web	●	●	Yes	●	Lease	$$$

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

Web Interviewing Software Solutions	Operating System					Design Tool	Web Interviewing Features					Purchasing	
Software Title/ Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	Data Collection (Web or E-mail)	Web Security	Quota Control	Tabulation & Analysis Tools	Real-Time Reports	Buy or Lease	Price Range
MaxDiff/Web Sawtooth Software, Inc., p. 86	●				●	GUI	Web	●	●	Yes	●		$$$
Mobile Surveys Itracks, p. 81					●	Both	Both	●	●	Yes	●		
MR Interview SPSS Inc., p. 87	●				●	Both	Both	●	●	Yes		Either	$$$$
NetE-nable AutoData Systems, p. 74	●					GUI	Web			Yes		Lease	$$
Online Focus Groups Itracks, p. 81					●	GUI	Web	●	●	Yes	●		
Opinio ObjectPlanet AS, p. 84	●	●	●	●	●		Both	●		Yes	●	Either	$
Panel+ Vision Critical, p. 89					●	GUI	Web	●	●	Yes	●	Lease	
PRIME: Custom Online Survey Software Enetrix, p. 78					●	GUI	Web	●	●	Yes	●	Either	$$$$
QueryWeb The Analytical Group, Inc., p. 72	●					Both	Web	●	●	Yes	●	Buy	$$$$
QuestionPro QuestionPro.com, p. 85					●	GUI	Web	●	●	Yes	●	Either	$$
QuestionPro MicroPoll QuestionPro.com, p. 85					●	GUI	Both						
Raosoft EZReport Raosoft, Inc., p. 85	●					Both	Both			Yes	●	Buy	$
Raosoft EZSurvey Raosoft, Inc., p. 85	●				●	Both	Both	●		Add-on	●	Buy	$
Raosoft InterForm Raosoft, Inc., p. 85	●				●	GUI	Web	●		Add-on		Buy	
Remark Web Survey Professional Gravic, Inc. - Remark Products Group, p. 80	●					Both	Both	●				Buy	$$
Remark Web Survey Standard Gravic, Inc. - Remark Products Group, p. 80	●					Both	Both	●		Yes		Buy	$$
Research Reporter Insight Marketing Systems Pty. Ltd., p. 80					●			●	●	Add-on	●	Either	$$$$
Results for Research 6.0 RONIN Corporation, p. 85	●				●	Both	Web	●	●	Yes	●	Buy	
Sensus Web Sawtooth Technologies, Inc., p. 86	●					Both	Web	●	●	Yes		Buy	
SNAP Internet Snap Surveys, Ltd., p. 87	●					GUI	Both	●	●	Yes	●	Buy	
SNAP Professional Snap Surveys, Ltd., p. 87	●					GUI	Both	●	●	Yes	●	Buy	
SSI Web Sawtooth Software, Inc., p. 86	●				●	Both	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
StatPac Survey Software StatPac, Inc., p. 87	●					Syntax	Both	●		Add-on		Buy	$$
StyleMap®.Net Moskowitz Jacobs Inc., p. 84					●	GUI	Web	●	●	Yes	●		
Survey Console QuestionPro.com, p. 85					●	GUI	Both	●	●	Yes	●	Lease	$
Survey Creator Common Knowledge Research Services, p. 76					●	Both	Web	●	●	Yes	●		
Survey Creator Your2Cents Online Opinion Panel, p. 89					●	Both	Web	●	●	Yes	●		
Survey Genie - Gold William Steinberg Consultants, Inc., p. 87	●					GUI	Both			Yes		Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 82	●				●	GUI	Both			Yes		Buy	
Survey Select Expert SurveyConnect, Inc., p. 88	●					GUI	Both	●		Yes		Buy	$$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 87	●					GUI	Both			Yes		Buy	$
surveyNgine.com Database Sciences, Inc., p. 78					●					Yes			
SurveyPro Apian Software, p. 72	●					GUI	Both	●	●	Yes	●	Buy	$$
SurveyWriter SurveyWriter®, p. 88					●	GUI	Web	●	●	Yes	●	Either	$
Sysurvey.com SySurvey, p. 88					●	GUI	Both	●	●	Yes	●	Lease	
TestKit Hexworx Computer Services P/L, p. 80	●		●	●	●	Both	Web			Yes		Buy	$
The Survey Cybernetic Solutions - The Survey Software, p. 78	●					GUI	Both	●		Yes		Buy	$
The Survey System - Web Creative Research Systems, p. 78	●					GUI	Both	●	●	Yes	●		$$
The Survey System (Version 9.5) Creative Research Systems, p. 78	●					GUI	Both	●	●	Yes	●		$$
Think Virtual Fieldwork Think Virtual Fieldwork, p. 88					●		Both						
Walker Smart Loyalty® System Walker Information, p. 89	●		●		●	Both	Web	●		Yes	●	Lease	$$$$
WebSurvent CfMC Research Software, p. 76	●		●	●	●	Both	Web	●	●	Add-on	●	Lease	
Zoomerang zPro Zoomerang, p. 89					●	GUI	Both	●		Yes	●	Buy	$$
zTelligence MarketTools, Inc., p. 84					●	GUI	Web	●	●		●		

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

Miscellaneous Software Software Title/ Company/Listing page #	Audience Response	Data Clearing/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 System	Translation	Web Usability
2D VOG SensoMotoric Instruments, p. 86	●																
3D VOG SensoMotoric Instruments, p. 86	●																
AccessPoint for Market Research Global Bay Mobile Technologies, p. 80	●						●	●									
ActiveGroup ActiveGroup, p. 72										●							
ARC GIS 9.2 Business Analyst ESRI, p. 78						●											
ARCS® ARCS® IVR Systems, p. 74											●						
ARGUS Perceptual Mapper SPRING SYSTEMS, p. 87				●	●												
Arthur The Analytical Group, Inc., p. 72			●														
ASDE Survey Sampler - Canada ASDE Survey Sampler, p. 74														●			
ASDE Survey Sampler - USA ASDE Survey Sampler, p. 74														●			
BayaSoft Custom Development BayaSoft LLC, p. 74																	
BrandMap WRC Research Systems, Inc., p. 89				●													
BrandProfiler WRC Research Systems, Inc., p. 89				●													
BrandTrend WRC Research Systems, Inc., p. 89			●														
Bulletin Board Focus Groups Itracks, p. 81										●							
CART Salford Systems, p. 86				●													
Claritas BusinessPoint Claritas Inc., p. 76		●	●	●	●												
Clementine SPSS Inc., p. 87				●													
Clipstream™ Video MR Clipstream™, p. 76										●						●	
Community Coder ESRI, p. 78		●				●											
ConsumerPoint Claritas Inc., p. 76			●	●	●	●											
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 87				●													
Cutom Panel Building Itracks, p. 81											●						
Data Tailor MDSS, Inc., p. 84		●					●	●			●						
DataFit/DataFit X Oakdale Engineering, p. 84				●													

Miscellaneous Software Software Title/ Company/Listing page #	Audience Response	Data Clearing/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 System	Translation	Web Usability
DecisionPad Apian Software, p. 72					●												
Delve!Online™ Lidlow Worldwide, p. 82										●							
DialQ TeleSage, Inc., p. 88													●				
Dub Planner NEBU b.v., p. 84							●				●						
DynaMap/Census Tele Atlas, p. 88						●											
East 4.0 Cytel Inc., p. 78					●												
EFM Community Vovici Corporation, p. 89											●						
EFM Feedback Vovici Corporation, p. 89					●												
EFS-Panel Globalpark US, p. 80											●						
ESPRI Information Tools Ltd., p. 80				●	●												
E-Tabs AutoGraph E-Tabs, p. 80			●														
E-Tabs Enterprise E-Tabs, p. 80			●														
E-Tabs Interactive E-Tabs, p. 80			●	●													
E-Tabs Lite Reader E-Tabs, p. 80			●		●												
E-Tabs Professional Reader E-Tabs, p. 80			●														
E-Tabs Web E-Tabs, p. 80			●														
E-Tabs Writer E-Tabs, p. 80			●														
Eval Builder Your Perceptions, Inc., p. 89	●																
EzMedia Plan New Age Media Systems, Inc., p. 84			●	●													
GENESYS Sampling Systems GENESYS Sampling Systems, p. 80														●			
Goldminer® Statistical Innovations, Inc., p. 87				●													
HARMONI Information Tools Ltd., p. 80				●	●												
Headliner® Austin NameStormers, p. 74									●								
iMARK Online Claritas Inc., p. 76			●	●	●	●	●										
Interque Crusader Services, p. 78										●							

Miscellaneous Software Software Title/ Company/Listing page #	Audience Response	Data Clearing/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 System	Translation	Web Usability
Ioxphere Xorbix Technologies, Inc., p. 89	●															●	
IPSS Senecio Software, Inc., p. 86						●											
iViewX SensoMotoric Instruments, p. 86	●																
iXPRESS Claritas Inc., p. 76			●	●	●	●											
Kinesis Survey Kinesis Survey Technologies, LLC, p. 82											●						
KMRQuest KMR Group, p. 82				●	●	●											
Latent Gold® Statistical Innovations, Inc., p. 87				●													
LogXact Cytel Inc., p. 78					●												
MAIA Market Attitude & Intent Analysis Hamilton-Locke, Inc. - Verbatim Analysis, p. 80					●												
MapInfo Tetrad Computer Applications, Inc., p. 88					●												
MapInfo Professional/MapX Pitney Bowes MapInfo, p. 85						●											
MapPoint T etrad Computer Applications, Inc., p. 88					●												
Maptitude Caliper Corporation, p. 76						●											
Maptitude for Redistricting Caliper Corporation, p. 76						●											
Maptitude for the Web Caliper Corporation, p. 76																●	
MARS Salford Systems, p. 86					●												
MENTOR CfMC Research Software, p. 76		●		●													
Microtab Version 7 - Professional Edition Microtab, Inc., p. 84		●															
Microtab Version 7 - Standard Edition Microtab, Inc., p. 84		●															
Microtab Version 7 SPSS Add-on Module Microtab, Inc., p. 84		●													●		
MiningSolv Decision Support Sciences, p. 78				●													
MktSIM SPRING SYSTEMS, p. 87					●												
M-Link The Analytical Group, Inc., p. 72			●														
MM4XL 7.0 MarketingStat, p. 82				●	●									●			
MPE Data Entry & Editing DATAN, Inc., p. 78				●													

Miscellaneous Software Software Title/ Company/Listing page #	Audience Response	Data Clearing/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 System	Translation	Web Usability
mr Studio SPSS Inc., p. 87		●	●														
MRDCL Marketing and Research Data Consultants, p. 82		●															
mTAB Research Analysis System PAI-Productive Access, Inc., p. 84				●	●												
NamePro® Austin NameStormers, p. 74									●								
Online Focus Groups Itracks, p. 81								●									
OnTraq Marketing and Research Data Consultants, p. 82		●															
Panel+ Vision Critical, p. 89											●						
PanelPortal Toluna, p. 88											●						
PASS Dataxiom Software, Inc., p. 78														●			
PCensus Tetrad Computer Applications, Inc., p. 88						●											
PEER Forecaster Delphus, Inc., p. 78					●												
PEER Planner for Windows Delphus, Inc., p. 78					●												
Perception Analyzer MSInteractive - Perception Analyzer, p. 84	●																
PositionSolve Decision Support Sciences, p. 78				●													
Postal Carrier Route Polygons Sammamish Data Systems, Inc., p. 86						●											
Power & Precision Dataxiom Software, Inc., p. 78														●			
PrefSolv Decision Support Sciences, p. 78				●													
PrimeLocation Claritas Inc., p. 76			●	●	●	●	●										
Pronto Telephony Solutions VOXCO (Groupe Voxco Inc.), p. 89													●				
PRO-T-S® Telephony Systems PRO-T-S® Telephony Systems, p. 85													●				
P-STAT P-STAT, Inc., p. 85		●			●									●			
Pulse DNA Software Suite Pulse Group, p. 85		●	●					●				●					
QBAL Jan Werner Data Processing, p. 89														●			
QGEN Jan Werner Data Processing, p. 89		●															
Q-Leap The Analytical Group, Inc., p. 72			●														

Miscellaneous Software Software Title/ Company/Listing page #	Audience Response	Data Clearing/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 System	Translation	Web Usability
QPSMR REFLECT QPSMR Limited, p. 85					●												
Qualboard 20/20 Research - Online, p. 88										●							
QuestionPro QuestionPro.com, p. 85					●					●							
Quick Tally Quick Tally Audience Response Systems, Inc., p. 85	●																
Raosoft EZReport Raosoft, Inc., p. 85				●	●												
Raosoft EZSurvey Raosoft, Inc., p. 85					●												
Raosoft InterForm Raosoft, Inc., p. 85					●												
Raosoft SurveyWin Raosoft, Inc., p. 85					●												
Reply Fleetwood Group, Inc., p. 80	●				●												
Report Direct Marketing and Research Data Consultants, p. 82			●														
Research Reporter Insight Marketing Systems Pty. Ltd., p. 80			●	●	●		●										
Research Tracker II MDSS, Inc., p. 84						●	●	●			●			●			
Research Tracker II for Medical Respondents MDSS, Inc., p. 84						●	●	●			●			●			
SegmentSolv Decision Support Sciences, p. 78				●													
SendQ TeleSage, Inc., p. 88			●		●												
Si-CHAID® Statistical Innovations, Inc., p. 87				●													
SmartForecasts® Smart Software, Inc., p. 87		●			●												
Snap3 SQAD Inc., p. 87					●												
Software G3 Rogator Software AG, p. 85											●						
SOLAS Dataxiom Software, Inc., p. 78														●			
Sp-Link The Analytical Group, Inc., p. 72			●														
SSI - SNAP Survey Sampling International, p. 88														●			
Statistics Calculator StatPac, Inc., p. 87					●												
StatXact Procs for SAS Users Cytel Inc., p. 78					●												
SuperCROSS Alta Plana Corporation, p. 72			●	●	●												

Miscellaneous Software Software Title/ Company/Listing page #	Audience Response	Data Clearing/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 System	Translation	Web Usability
SuperWeb Alta Plana Corporation, p. 72			●		●												
Survey Charter Alleviation Software, Inc., p. 72			●		●												
Surview Sales Media Research Edition Bruce Bell & Associates, Inc., p. 74					●												
Sysurvey.com SySurvey, p. 88	●	●									●						
TestKit Hexworx Computer Services P/L, p. 80			●			●								●		●	
The Rite Site Easy Analytic Software, Inc., p. 78						●											
The Survey System - Web Creative Research Systems, p. 78											●						
The Survey System (Version 9.5) Creative Research Systems, p. 78											●						
TransCAD Caliper Corporation, p. 76						●											
Trial Map SPRING SYSTEMS, p. 87					●												
Turbo Spring-Stat SPRING SYSTEMS, p. 87				●	●												
USORT The Uncle Group, Inc., p. 88		●															
U-Tab Weeks Computing Services, p. 89			●	●													
Vertical Mapper Tetrad Computer Applications, Inc., p. 88						●											
VerticlePanel QuestionPro.com, p. 85											●						
ViewQ TeleSage, Inc., p. 88					●												
Virtual Call Center Network Itracks, p. 81							●										
Voxco Command Center VOXCO (Groupe Voxco Inc.), p. 89							●						●				
WinLink The Analytical Group, Inc., p. 72			●														
XSight QSR International Pty. Ltd., p. 85							●										
Zip + 2 Polygons Sammamish Data Systems, Inc., p. 86						●											
Zip + 4 Centroids Sammamish Data Systems, Inc., p. 86						●											
Zip Code Polygons Sammamish Data Systems, Inc., p. 86						●											
Zipfind Xionetic Technologies, Inc., p. 89						●											

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cent confidence level) would be if the survey had used a pure probability sample with a response rate of 100 percent and there were no other possible sources of error. In the real world of polling there are several other sources of error that may sometimes be larger than this theoretical calculation of sampling error, and there is no good way to calculate them."

The release outlines other possible sources of error in a poll:

• Non-response errors – Pollsters often do not complete interviews with most of the people they intend to survey because they are not available or refuse to be interviewed.

• Errors due to question wording or question order – The answers to questions are sometimes influenced by such things as how the questions are posed, what questions were asked earlier in the survey or which responses are presented to the respondent, among other things.

• Errors due to interviewers. Interviewers sometimes influence, often unconsciously, the answers given by the people they survey (e.g., social desirability, acquiescence bias, researcher expectancy effects, etc.).

• Weighting errors – Most polls are weighted statistically to compensate for demographic and other biases in the survey sample; this is an imperfect process. Weighting the data can cause errors in the results.

Use is controversial

Harris Interactive drew several conclusions from its research:

• The use of the phrase "margin of error" is controversial because it is often used when reporting telephone polls even though it is not possible to calculate a real margin of error.

• Pollsters must do a better job of explaining all the possible sources of error in their polls, not just a theoretical sampling error, which does not take into account the impact of other, potentially substantial, sources of error.

• The accuracy of opinion polls should be judged empirically by the accuracy and reliability of their findings, not on a theoretical basis when there is no way to calculate a real margin of error.

• Pre-election polls should continue to be trusted only so long as their final forecasts are reasonably accurate, not because they are theoretically "scientific" (since there is no means to establish that they are).

• The words "margin of error" should probably not be used at all in conjunction with polling results.

At the end of the survey, respondents were asked if pollsters should continue using the phrase "margin of error" in light of the impossibility of calculating most possible sources of error. Surprisingly, a 52 percent to 40 percent majority thinks that they should. (For its part, the Harris Poll does not use the phrase.) | Q

classified ads

corrections

On page D46 of the 2008 Focus Group Facilities Directory, the listing for Savitz Field and Focus – Atlanta contained an incorrect street address. The address should read: 3405 Piedmont Road N.E., Suite 350.

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trade talk

By Joseph Rydholm
Quirk's editor

No margin for 'margin of error'

As we go to press with this issue, the various state caucuses and primaries are being held around the country. With election-year madness heating up, I read with interest a study by Harris Interactive about (mis)perceptions surrounding pollsters' oft-used phrase "margin of error."

Already this year, the political polling process has taken it on the chin, thanks to Hillary Clinton's first-place showing in New Hampshire. Following Barack Obama's victory in Iowa, several polls leading up to the New Hampshire contest incorrectly had Clinton finishing a distant second to Obama.

Politicians have always had odd relationships with polls, especially during election years. If the numbers are in a candidate's favor, the poll's methodology is viewed as rock-solid. If not, then the flaws of the survey process are dredged up by the candidate and his or her supporters.

While the media historically haven't helped clear things up very much - eschewing even brief mentions of the possible effects of errors in their stories on poll results - I have noticed that many outlets have become more responsible in how they report poll data, which, as an industry observer gives me a small bit of hope. The political polling process certainly isn't perfect, but for many in the general public, election and other opinion polls are the main form of research they are aware of, so anything that can be done to enhance the (under)standing of polls among the populace is worthwhile.

Misperceptions

Clearly, as the Harris Poll found, there are a lot of misperceptions about error out there. After surveying 1,052 U.S. adults by phone from October 16-23 last year, Harris reported the following:

- Fifty-two percent of all adults believe, wrongly, that statements about "the margin of error being plus or minus 3 percent" mean that "all of the results of the survey are accurate to within a maximum of 3 percent given all types of error."
- A 66 percent majority of adults believes, wrongly, that the phrase "margin of error" includes calculation of errors caused by "how the questions are worded."
- Large minorities believe, wrongly, that the calculation of the margin of error includes errors in developing a representative base or weighting errors (45 percent), mistakes made by interviewers (45 percent) and errors because of where the questions are placed in the survey (40 percent).
- Only 12 percent of the public agrees that the words "margin of error" should only address one specific source of error, sampling error - as they almost always do.
- A 56 percent majority believes that statements about margin of error do not make it clear that this calculation excludes all sources of error except for sampling error for a pure random sample.

Purely theoretical

As the Harris press release notes, margin of error is "actually a purely theoretical calculation of what the likely maximum error (at a 95 per-

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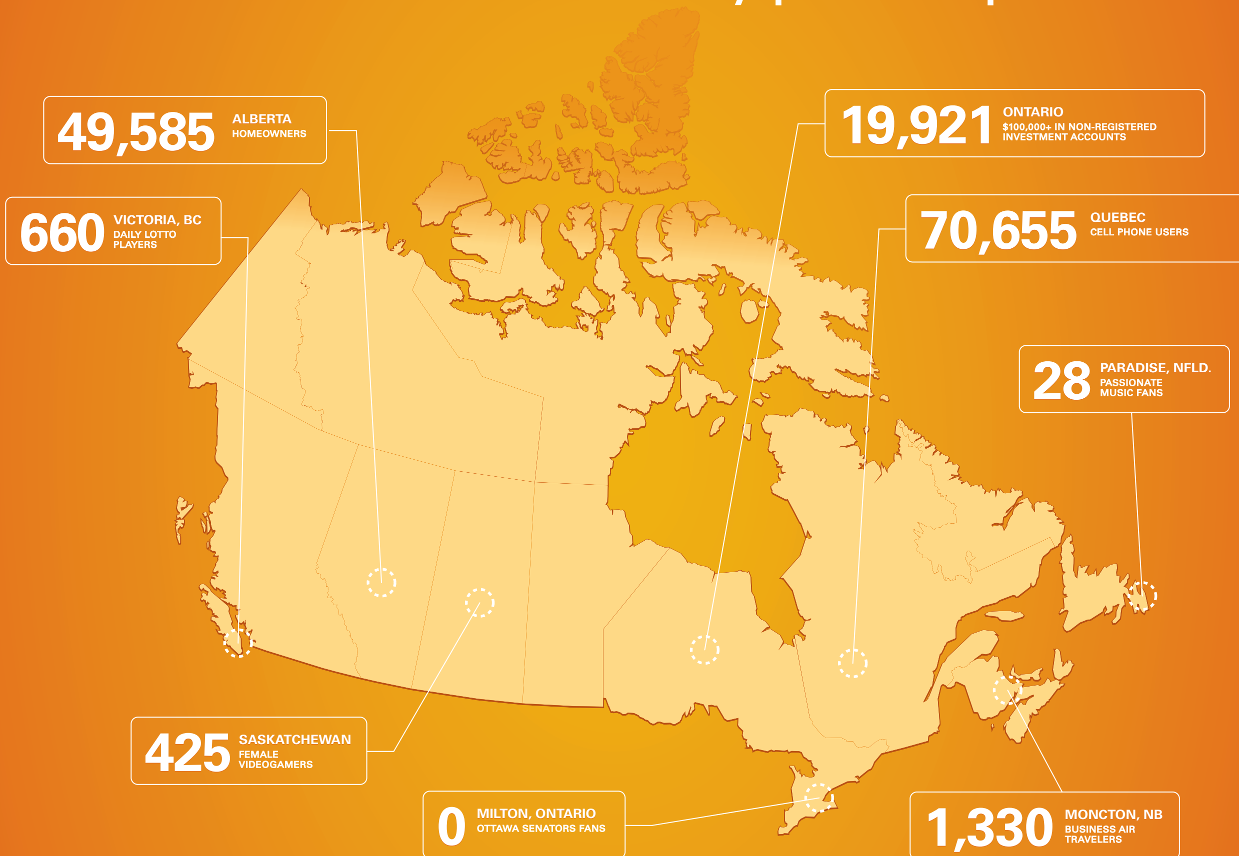

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