FEBRUARY 2009

QUIRK'S

Marketing Research Review

Mail or Web?

American Cancer Society compares modes for survey of volunteers

Also...

- MRA office keeps regulators at bay
- Low-budget market research approaches
- Ethnography from the client's perspective

We are proud to announce the appointment
of *Edward (Ted) G. Donnelly III*
to the position of *MANAGING DIRECTOR.*

Ted currently serves as Vice President of Research and oversees all Full Service functions, Project Management and Finance. Additionally, Ted sits on the PRC Board and is Chair of the PRC Development Committee. Ted earned a Bachelor of Science degree at Penn State University, and his Master's degree and Ph.D. at the University of Edinburgh (Scotland). Ted has also taught Marketing at the Johns Hopkins University.

Please join us in congratulating Ted on this career achievement.

Jay Stewart White, CEO   Edward (Ted) M. Watson, Jr., COO

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Volume XXIII Number 2

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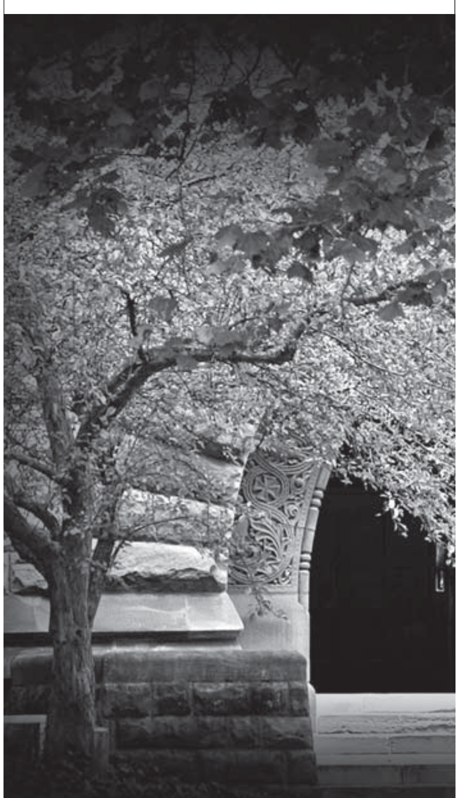

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San Francisco	Mar 10-12
Chicago	Apr 20-22
Philadelphia	May 19-21
Cincinnati	Jun 23-25
New York	Jul 27-29
New York	Aug 25-27
Los Angeles	Sep 28-30
Chicago	Oct 27-29
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104 | Designing Effective Questionnaires: A Step by Step Workshop $2,195

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Los Angeles	Feb 24-26
Chicago	Apr 28-30
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San Francisco	Aug 18-20
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106 | Online Research Best Practices & Innovations $1,795

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in case you missed it...

news and notes on marketing and research

Feeling hassled? You're not alone!

Rising prices are a major hassle in Americans' daily lives, as 82 percent of Americans say they have been experiencing them, an eight-point leap from 2006, according to The Harris Poll from Rochester, N.Y., research company Harris Interactive. Suffice it to say, hassles cause stress, and some appear to cause more stress than others.

Just under half of Americans say they have experienced trouble sleeping and have concerns about health in general. Other woes experienced by more than one-quarter of Americans include not having enough money for basic necessities (35 percent), illness of a family member (29 percent), being lonely (27 percent) and having too much information to process at one time (25 percent). With only two exceptions (abuse of personal privacy and problems with work), women are more likely than men to have experienced each of the daily hassles on the list.

Certain demographic groups have more stress than others. One-quarter of Americans say they have experienced a lot of stress, and geography may factor in as fewer Midwesterners experience a lot of stress than their Eastern counterparts (22 percent versus 32 percent). Generation X has the most stress among the generations (33 percent); three in 10 Hispanics say they have a lot of stress compared to 26 percent of whites and 21 percent of African-Americans; and one-third of those with children in the household say they experience a lot of stress while just 23 percent of those without children say they experience a lot of stress.

Burger King skivvies top 2008's most laughable line extensions

What do Burger King underwear, Kellogg's hip-hop street wear and Allstate Green insurance have in common? They all were voted among the worst brand extensions of 2008, according to Kenneth Hein's December 12, 2008, article "BK Boxers Leads Pack of Worst Line Extensions," in *Brandweek*.

TippingSprung, a New York Research company, polled almost 700 *Brandweek* readers and other marketing professionals online about 2008's flurry of line extensions. Among the other duds: Coca-Cola's RPet clothing at Wal-Mart, a Playboy energy drink and the Disney Sleeping Beauty executive fountain pens, priced at up to $1,200.

TippingSprung has been conducting the survey for five years. In past years, Precious Moments coffins, Hooters airlines, Cheetos lip balm and Salvador Dali deodorant won the dishonor of being selected for the list.

This year a number of factors, namely the rise of green marketing and the fall of the economy, helped shape some of the marketers' selections. Allstate Green insurance was spotlighted as a prime example of greenwashing (overstated or misrepresentative green claims made by marketers), according to three-quarters of respondents. The program offers paperless statements (like most institutions) and a $10 donation to an unspecified organization.

Likewise, Coke's RPet clothing line, made from recycled bottles, suffers from the fact that its plastic packaging is viewed as being a big part of the problem. Almost 58 percent of respondents viewed the RPet line as more greenwashing than green. The Sleeping Beauty pen was selected by a third of respondents, followed by the Porsche Design Kitchen and its $100,000 price tag.

Still, the Burger King underwear was selected as the single most-inappropriate line extension, according to 45.5 percent of those polled. "Marketers are so in love with their brands that they think consumers are as well and will go to the lengths of wearing their brand name on their underwear," said Laura Ries of Ries & Ries, a Roswell, Ga., brand consultancy. Kellogg's hip-hop street wear was second worst (22.8 percent), followed by Kanye West's travel site (kanyetravel.com).

Of course, not all of the product rollouts were bad. Campbell's V8 Soup was selected the top beverage extension. Nearly 77 percent of marketers said it was a good idea. It is worth noting that the beverage category is notorious for its misses, as illustrated by 2008's flops, including Rolling Stones Icewine, Dr. Dre sparkling vodka, the Playboy energy drink and even Twinings coffee.

Coppertone sunglasses and Mr. Clean performance car washes were named the best brand extensions, according to 31.2 percent and 25.7 percent of respondents, respectively.

Lady Boomers talk up Kraft, other brands

Baby Boomer women (ages 43-62) talk about Kraft more than any other packaged goods food brand, according to research results released by Rodale's *Prevention* magazine, in partnership with the TalkTrack study, conducted by New Brunswick, N.J., research company Keller Fay Group. Right up there with Kraft, Folgers is the brand that Boomers are more likely to talk about in comparison with younger women.

The difference between the young and the not-so-young is also significant beyond what coffee is in your cup. The study's tracking of a year's worth of online and offline conversations determined that Boomer women have higher-quality word-of-mouth (WOM) than younger women do; that is, the conversations are more credible, and Boomer women are more likely than younger women to pass on what they hear to others, to seek additional information and to actually purchase the products talked about.

In fact, Boomer women had higher purchase intent than younger women for 14 of the 15 product categories tracked, the only exception coming in media and entertainment. The most positive WOM from the Boomers occurred in beauty and personal care, where they surpassed younger women in all six quality criteria measured: recommendation, credibility, pass-along, additional info-seeking and purchase intent. The top talked-about brand in the category was Olay, followed by Dove, Avon, Pantene, Suave, Bath & Body Works, Mary Kay, Crest, L'Oreal and Revlon.

Food was also a highly-ranked category. Following Kraft, the most talked-about packaged goods brands by the Boomer women were Stouffer's, Campbell's, Lean Cuisine, Kellogg's, Tyson, Weight Watchers, Gerber, Healthy Choice and Betty Crocker.

Overall, in comparison with younger women, Folgers was followed by Olay, Avon, Walgreens, Pantene, Kraft, Lipton, JC Penney, CVS and Olive Garden.

Retail stores compete in meals on-the-go

Six percent of the roughly 62 billion commercial food-service meals and snacks consumed in a year are purchased at retail stores (food, drug, discount, department and price clubs), and convenience stores represent an additional 7 percent, according to Retail Meal Solutions, a report from Port Washington, N.Y., research company The NPD Group. Retail food service represents a spending level of close to $13 billion.

According to the report, which

analyzes how retailers are satisfying consumers' needs for ready-to-eat foods, retail ready-to-eat meal and snack purchases increased 2 percent for the year ending August 2008. The quick-service restaurant (QSR) segment, with which retail stores directly compete in providing convenience meal solutions, served only 1 percent more meals and snacks. The full-service restaurant segment saw a downturn.

"Consumers' increasing use of food service for ready-made meals has long been recognized by grocery retailers as an opportunity," says Bonnie Riggs, NPD restaurant industry analyst and author of the Retail Meal Solutions report. "For some time, retail stores have offered prepared foods in the deli department, but have now expanded food-service offerings to include a variety of cold and hot ready-to-consume meals and snacks."

The report dispels the popularly-held belief that supper is the prime day part for retail meal and snack solutions. NPD finds supper accounts for only 17 percent of retail meal solutions consumed, but is steadily growing, whereas it's a weakening day part for QSR. Night-time snacking represents the largest share (35 percent) of ready-to-eat food consumed, followed by lunch (27 percent) and then the morning meal (21 percent).

Consumer motivations in purchasing prepared meals and snacks from retail stores include convenience, availability of healthier options, variety and affordability - the very attributes, Riggs points out, that consumers say QSRs lack. For more information visit www.npd.com.

Honda brings back most repeat customers

When it comes to bringing buyers back to the showrooms, no brand does it better than Honda, according to the 2008 Power's Customer Retention Study from J.D. Power and Associates, a Westlake Village, Calif., research company. For 2008, Honda saw 64.7 percent of its buyers return when shopping for their next vehicle. Toyota placed second at 63.2 percent and Lexus third at 60.4 percent.

"Honda has historically been a strong performer in terms of customer retention, but 2008 marks the first time since the inception of the study that the brand has achieved the highest retention rate in the industry," says Debbie Ortuño, manager, product research and analysis, J.D. Power and Associates.

The industry as a whole averaged 48 percent retention, though about a third of all brands increased their retention rates over 2007. Land Rover marked the biggest increase in retention, up 18 percent.

Power also notes that fuel economy and safety have surged in the rationales of shoppers when buying a new vehicle, and addressing those needs will be even more important in 2009, when new vehicle sales are expected to crater at around 12 million units. For more information visit www.jdpower.com.

Texting hotspots found in the South

El Paso, Texas, is the top U.S. city for text messaging, as 57 percent of cell phone subscribers age 18+ in El Paso text message versus 48 percent of adult cellular subscribers nationally, according to study results from Scarborough Research, New York. Other leading markets for text messaging include Salt Lake City, Dallas and Memphis, Tenn. Fifty-five percent of cell subscribers in these cities utilize the text messaging feature on their phones. Fort Myers, Fla.; Charleston, W.Va.; and Grand Rapids, Mich., are the local markets least likely to text message. Thirty-six percent of Fort Myers and Charleston cellular subscribers utilize the text messaging feature on their phones, as do 35 percent of those in Grand Rapids.

Youth and cultural diversity are two demographic commonalities among these so-called texters. These consumers are 49 percent more likely than all cellular subscribers to be ages 18-24, 14 percent more likely to be Hispanic and 24 percent more likely to be African-American. Scarborough points to these similarities as likely reasons why El Paso, Salt Lake City, Dallas and Memphis are the top text messaging markets. El Paso and Dallas both have Hispanic compositions that are well above average. Further, Salt Lake City and El Paso are top markets for 18-24-year-old adults, and Memphis is a leading city for African-Americans.

"Text messaging could be largely disproportionately appealing to marketers because it delivers a young,

continued on p. 58

names of note

The Melior Group, a Center City, Pa., research firm, has promoted **Elizabeth Foley** and **Liz Cohen** to vice president.

Foley Cohen

Verve, a London research company, has named three cofounders: **Andrew Cooper**, partner and CEO; **Mike Hall**, partner, development; and **Jon Gumbrell**, partner, technology progression.

Hotspex, a Toronto research company, has hired **Lisa Manuzza** as senior vice president in its New York office.

Lake Forest, Calif., fast-food chain *Del Taco* has appointed **Tom Johnson** as director, consumer insight.

New York research company *Arbitron Inc.* has promoted **Jeanette Schaller** to account manager, national radio service team.

Mark McLaren has been hired as national accounts manager, agency and advertiser sales, with *Mediamark Research & Intelligence*, New York.

Stewart Jones has joined Paris research company *Ipsos* as global head of operations.

Ipsos Marketing, a New York division of Paris research company Ipsos, has named **Peter Saracena** senior vice president.

TNS Healthcare, a division of New York research company TNS, has hired **Susanne Michel** as managing director, global market access, pricing and reimbursement practice; and **Mark Sales** as leader of its global stakeholder management practice.

Evo Research and Consulting, London, has appointed **Debbie Jones** as associate director and **Gideon Feldstein** as research manager. Feldstein will work out of Evo's New York office.

Captura Group, a San Diego research company, has named **Felipe Korzenny** senior strategy consultant.

Fred LaManna has been appointed to the affiliate board of the *Pharmaceutical Business Intelligence and Research Group*, Phoenix.

Christopher Urinyi has been promoted to CEO of *Lightspeed Research*, Basking Ridge, N.J. Urinyi will be based in Princeton, N.J.

Urinyi Mitchell

LoyaltyOne, a Toronto research company, has hired **Andrew Mitchell** as vice president, business development, and **Dennis Armbruster** as managing partner, LoyaltyOne consulting.

Voxco, a Montreal research software company, has named **Yves Leblanc** its COO. Additionally, Voxco has hired **Michel Saulnier** as an expert consultant.

Steven Wyatt has been promoted to director of *Focus Pointe Chicago*, which is part of a network of focus group facilities in the United States and Europe.

Synovate, a Chicago research company, has hired **Pamela Welch** as key account director, Southeast Asia. Welch will be based in Singapore.

McCallum Layton, a Leeds, U.K., research consultancy, has appointed **Laura Finnemore** as research executive and **Paul Fanning** as trainee research executive with its quantitative team.

Finnemore Fanning

GfK Custom Research North America, a New York division of Nuremberg, Germany, research company The GfK Group, has appointed **Tracy Karagianis** as CIO. Additionally, *GfK Roper Public Affairs and Media*, a Washington, D.C., division of GfK Custom Research North America, has named **Bob Ward** vice president, account management.

Vancouver, B.C., research company *Angus Reid Strategies* and its parent company *Vision Critical Inc.*, also of Vancouver, have hired **Andy Morris** as research director and **Louise Davies** as account director to their London offices.

Additionally, Angus Reid Strategies has hired **Stéphane Lebrat** as vice president, based in Montreal.

Finally, Vision Critical has

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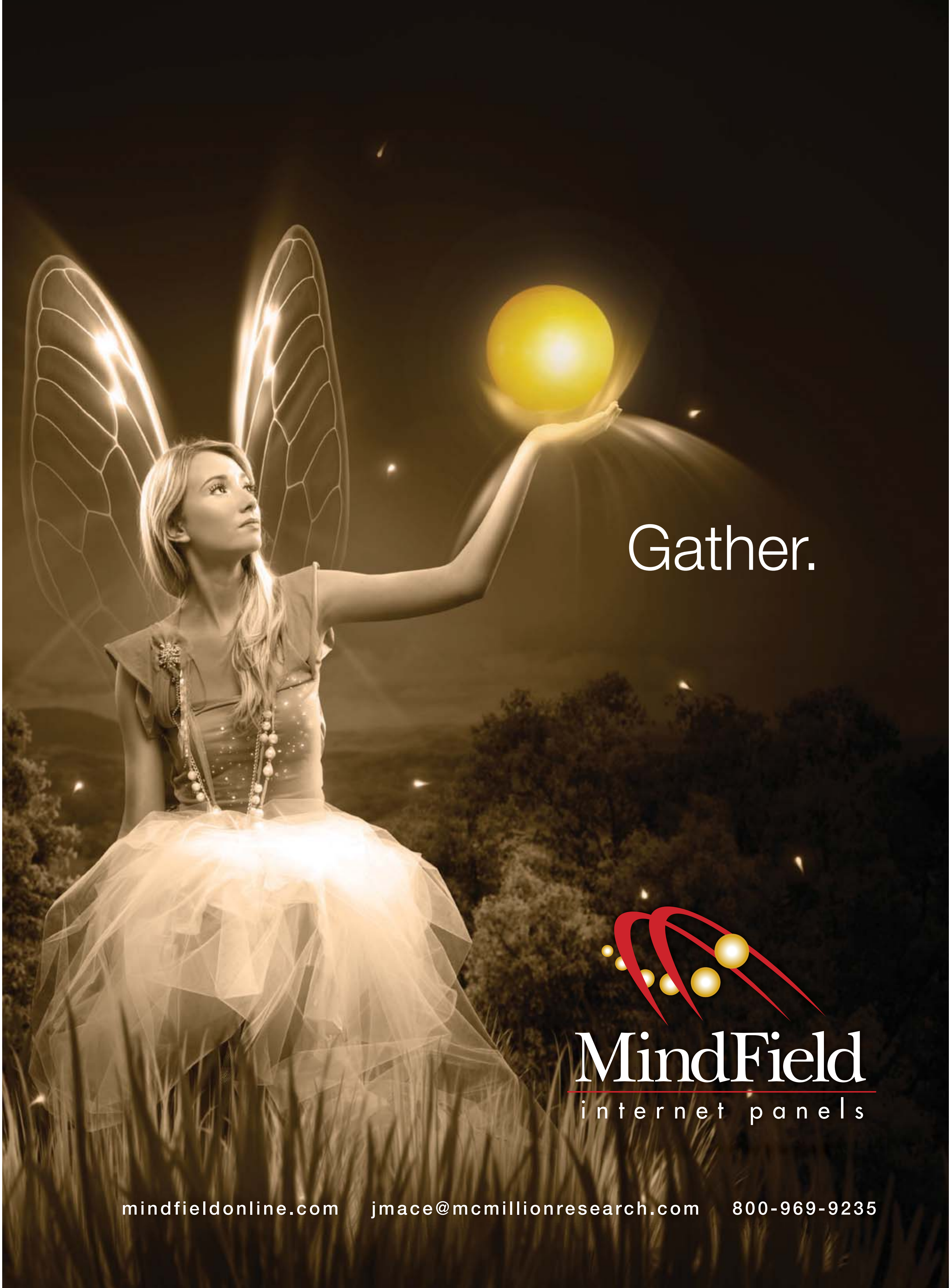
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MRA launches program to review online sample providers

The Marketing Research Association (MRA), Glastonbury, Conn., has created a research company review program to provide transparency in online research. The MRA Review Program is designed to vet and standardize online sample providers and to create a clear understanding of panel supplier practices as they relate to data quality.

The program consists of two elements, the first being a self review, where online sample providers can provide the information on their organization so buyers can better understand their capabilities. The second element is the internal review, where an independent professional researcher retained by MRA visits the company and verifies data provided. The review is intended to reveal the makeup of the company's panels or river samples, among other qualities. Results of any company participating at either level are put on the MRA Web site. For more information visit www.mra-net.org.

New report measures impact of economy on consumers

The NPD Group, a Port Washington, N.Y., research company, has launched The Economy Tracker, a monthly report designed to provide insight into consumers' perceptions of the U.S. economy, perceptions of their own economic situation and how they are responding to retail.

Specific measures available in the monthly report are focused on highlighting areas of opportunity for manufacturers and retailers, including the following: degree of confidence or concern; spending and shopping expectations overall and by category; key drivers of store and product selection; and changes in use of various payment methods. Categories covered in the report include consumer electronics, video games, music, movies, dining/eating out, apparel, footwear and others.

In addition to 12 monthly reports, a full report subscription includes quarterly summaries and a year-end analysis with a presentation designed to help identify the major economic trends and effects for the year. The tracker is based on online surveys completed by 1,000 nationally-representative respondents each month. For more information visit www.npd.com.

Online measurement tool goes PRO; smartphone users surveyed

TNS Compete, a Boston research company, has launched Compete PRO Enterprise, an online measurement service designed to serve as a hub for capturing and sharing online marketing insights across a large enterprise or agency. The tool is intended for larger brands and agencies and features unlimited site, search and referral analytics reports on-demand. Compete PRO is powered by the same data as Compete's vertical intelligence solutions.

Compete PRO is also available on a more limited basis for individual small business owners, search and online marketers. For more information visit https://my.compete.com/enterprise.

Separately, TNS Compete has unveiled a new service, Smartphone Intelligence, designed to deliver behavioral and survey-based insights on iPhone and other smartphone users. It is intended to provide carriers, handset manufacturers and marketers with a complete picture of how to reach mobile consumers.

Smartphone Intelligence is designed to combine consumer insights (through surveys) with behavioral data (through online clickstream data) to reveal how smartphone owners are using their phones, the sites they visit on the Web and what they like and dislike about their phone and Internet experiences. Smartphone Intelligence subscribers will receive quarterly reports with data about smartphone use and behavior, as well as individual recommendations. For more information visit www.compete.com.

Portal service analyzes IT industry sentiments

Northern Light, a Cambridge, Mass., research company, has released MI Metrics, a service designed to provide an in-depth analysis of IT industry analysts' observations, opinions and sentiments about the client company and targeted competitors and their products, strategies, performance and related industry issues. The information provided is distilled from market research reports, media articles and blog postings.

MI Metrics is a custom, analytic reporting service that provides a quantitative and qualitative overview of the total body of analyst coverage, including share of voice, net positives and negatives (to gauge analyst sentiment toward each company), and strategic business issues being discussed. In addition, Northern Light editors summarize analysts' views on the covered companies.

MI Metrics is produced by Northern Light's technology and its research staff using content and capabilities contained within SinglePoint, Northern Light's research portal offering. MI Metrics also taps Northern Light Business News, a searchable set of content sources, including business news services, business publications, newswires and blogs.

Northern Light's research indicates that approximately half of analyst mentions of companies occur in published analyst reports

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News notes

Rochester, N.Y., research company **Harris Interactive** has taken action to realign its cost structure. It has reorganized its U.S. research business units into integrated vertical teams to concentrate more resources on client issues. The company also announced the formation of centers of excellence, which will develop and deliver products and solutions into the marketplace.

The MacArthur Foundation, a Chicago public interest and community development network, has created a new interdisciplinary research network designed to help America prepare for the challenges and opportunities posed by our aging society. The MacArthur Research Network on an Aging Society will be supported by a three-year, $3.9 million MacArthur grant.

The Network will present new U.S. population and mortality projections and compare them to current government forecasts. The projections will forecast mortality under scenarios that take into account advances in bio-gerontology and the effects of unhealthy life conditions.

The Network will examine the potential benefits of remodeling the distribution of key activities, including education, work and leisure, across the life course. Research and projects will focus on three themes: the positive and negative impact of key intergenerational issues on families and society; the development of meaningful roles for older people; and the potential effects that the various sources of diversity and inequalities may have on the structure, economy and overall health of an aging society.

The Network will be chaired by John Rowe, professor at the Columbia University Mailman School of Public Health.

Calendar of Events March-June

CMOR will hold its annual respondent co-operation workshop on March 2-4 at the Miami Beach Resort and Spa in Miami Beach, Fla. For more information visit www.cmor.org.

The Pharmaceutical Marketing Research Group will hold its annual national conference on March 8-10 at the Wynn Hotel in Las Vegas. For more information visit www.pmrg.org.

Research Magazine will hold its annual conference, devoted to inspiration, innovation and ideas, on March 24-25 at the Riverbank Park Plaza in London. For more information visit www.research-live.com/research2009.

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on March 30-April 1 at the New York Marriott Marquis in Times Square. For more information visit www.thearf.org.

Photizo Group will hold its annual managed print services conference on April 26-28 at the Omni La Mansion del Rio in San Antonio. For more information visit www.managed-print-services.com/conference.htm.

The Business Intelligence Group will host its annual BIG Conference 2009, themed "B2B Research: New Dimensions," on May 13-15 at the Marriott St. Pierre in Chepstow, Wales. For more information visit www.bigconference.com.

The AAPOR will host its annual conference on May 14-17 at the Westin Diplomat Resort and Spa in Hollywood, Fla. For more information visit www.aapor.org.

Parks Associates will hold its Connections 2009 conference, focused on advanced digital lifestyle solutions for residential and mobile environments, on June 2-4 at the Santa Clara Convention Center in Santa Clara, Calif. For more information visit www.connectionsconference.com.

The Marketing Research Association will hold its annual conference on June 3-5 in Chicago. For more information visit www.mra-net.org.

The TTRA will hold its annual conference, themed "Catch the Wave: Tourism Research!," on June 21-24 at the Hilton Hawaiian Village in Honolulu. For more information visit www.ttra.com/hawaii2009.html.

To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail Emily Goon at emily@quirks.com. For a more complete list of upcoming events visit www.quirks.com/events.

An operation that lured consumers with promises that they could earn big money as trained and certified "mystery shoppers" has agreed to pay $850,000 to settle charges of deceptive marketing and contempt, with larger payments suspended due to defendants' inability to pay. In March 2007, the Federal Trade Commission (FTC) charged eight defendants - the three companies **Mystery Shop Link LLC**, Ventura, Calif.; **Tangent Group LLC**, Denton, Texas; **Harp Marketing Services Inc.**, Melbourne, Fla.; and five individuals - with violating the FTC Act in connection with a nationwide mystery shopping employment scam.

According to the FTC, the defendants claimed that mysteryshoplink.com was hiring mystery shoppers in local areas nationwide. The company ran help-wanted ads in newspapers and on radio and TV. Consumers who responded to the ads reached the defendants' telemarketers, who represented that mysteryshoplink.com had large numbers of available jobs and not enough shoppers to fill them. In exchange for a $99 fee, consumers were promised enough work to earn a steady full-time or part-time income as mystery shoppers. Instead, consumers received a worthless certification and access to postings for mystery shopping jobs controlled by other companies. Consumers had to apply for these mostly low-paying jobs and had no advantage over anyone else who found the postings elsewhere on the Internet for free. Most consumers got no jobs and earned no money.

As well as being accused of deceptive marketing, five of the eight defendants were also charged with

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By Brant Cruz

Don't give up on that segmentation study - do it smarter

Stock market volatility. Consumer pessimism. Economic instability. Even though the U.S. presidential election is behind us, these are still very uncertain times. When it comes to custom research, the easiest thing to do is nothing. Wait it out. But for how long? And what will the opportunity cost be if you don't begin the process now?

Obviously, we all need to be cognizant of economic factors when deciding when to launch any project. Any information can help, whether it's external data or indications from your customers that their sentiments have stabilized - even if that stabilization is on the pessimistic side.

For segmentations in particular, which can be especially challenging during periods of extreme uncertainty, it's important to at least begin the process for conducting the study. I have highlighted several major concerns below, with my thoughts on their validity and how to address or even overcome those challenges.

Concern: *A segmentation is less actionable in a bad economy than in a good one*

Not so. Remember that segmentations make you smarter about how you make all your investments. And as resources get scarcer, knowing who is most important (currently and in the future) makes tough decisions a bit easier. You could even make the argument that segmentations are actually more important in bad times.

Concern: *The research could produce different (or invalid) segments*

This should not be a cause for worry, and should not stop you from launching a study. For example, if you think about the key basis variables that would make for a great motivationally-based segmentation scheme (e.g., needs, attitudes, etc.), these things would not change based on economic climate.

The one area where you should expect to see some change in priority is the price dimension. But this is not necessarily a negative thing, and certainly no reason to throw your segmentation study in the recycle bin. Price is probably more important to nearly everyone now, and you may see more variance in any price variables included today than you would have a year ago. But this is the reality you will likely need to deal with for at least the next 12 months and possibly beyond.

The key is to understand the relative price sensitivity for each segment. This is critical as you make investment decisions in the current economic climate.

Concern: *We could derive incorrect relative values for the segments, leading to improper resource allocation*

Admittedly, this one is likely the trickiest. The reality is that February is probably a bad time to field anything that relies partially on self-reported measures of future spending. "Totally uncertain" is

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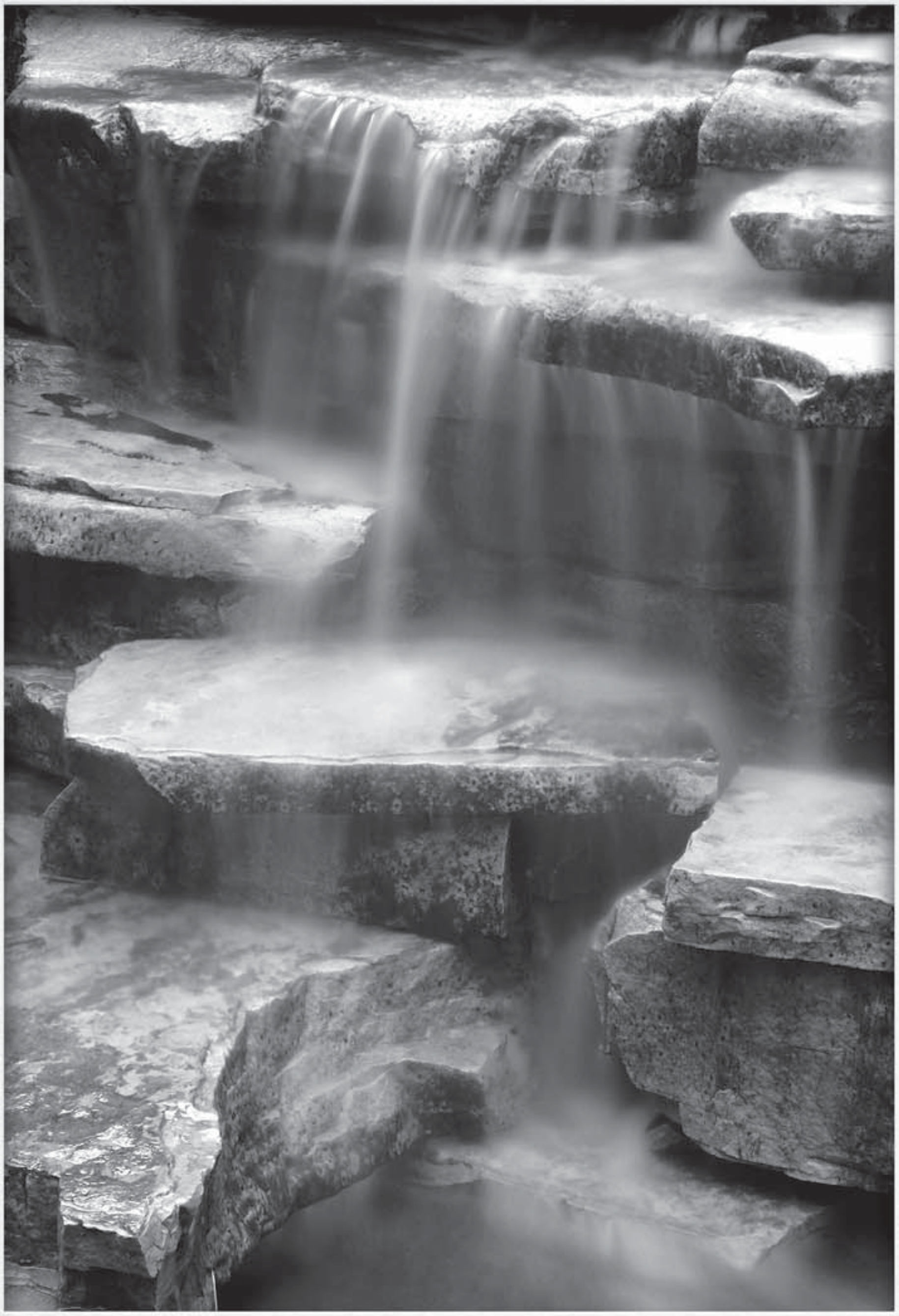
In the fine art of research,
the shades of gray complete the masterpiece.



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The Fine Art of Marketing Research

more problematic than "unhappy, but realistic." A lot will happen in the first quarter of 2009; people will have processed all of the information (a new president, the stock market, employment data, economic stimuli, retail holiday results), and made a mental plan for how this economy will affect them. Thus, assumptions (imperfect but directionally reasonable) can be made about their future spending plans.

Concern: *The study will have a shorter shelf life, and the ROI from the research will be materially smaller*
This is a small concern. I typically consider the shelf life of a segmentation study to be roughly 18-30 months, with 24 months being about right for most companies. A major upturn in the economy might affect some segments more than others, and therefore change how we would value those segments. Each company would need to weigh the possibility and cost of needing to explore segmentation again earlier than this benchmark against the risk of proceeding in this market without this information.

> *The reality is that February is probably a bad time to field anything that relies partially on self-reported measures of future spending.*

Concern: *Predictive scoring models that utilize internal data warehouses might not be as accurate*
It may be a bit tougher to do so, but you can and should get actionable predictive models created from existing data. If you include three years of data (for those customers you have it for), you can investigate and transform raw variables into new measures that may be more useful. However, it is possible that you will need to take an extra step because recent purchase history is so different from past trends. But that isn't a major problem and should not hold you back. | Q

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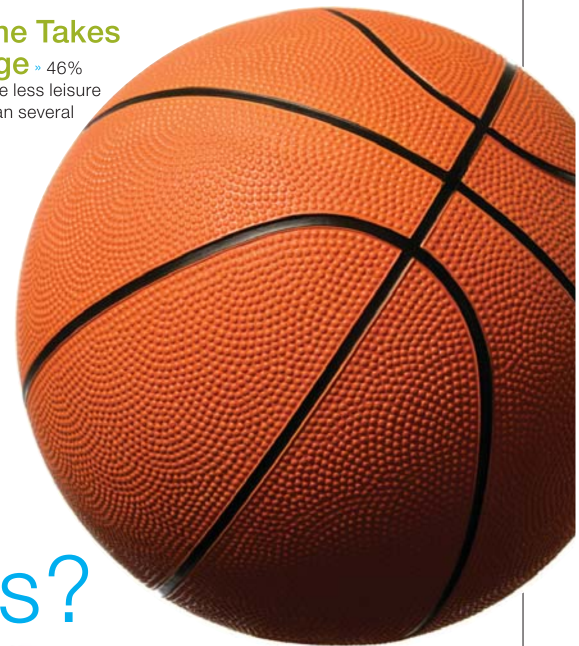
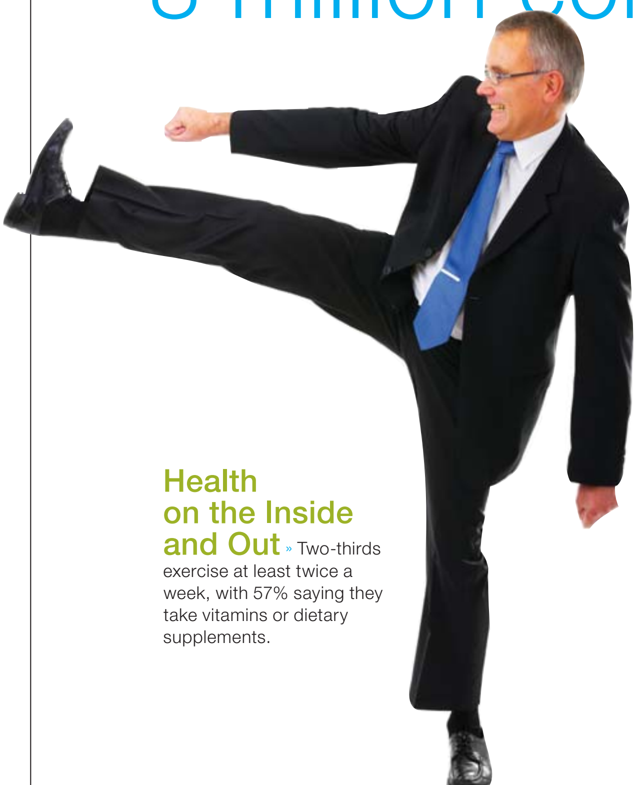
» 46% say they have less leisure time now than several years ago.



What's on the minds of our 8 million consumers?



TV Is Still Tops

» While the Internet is more popular than newspapers and radio for news, 50% said television remains their number one source.

Health on the Inside and Out

» Two-thirds exercise at least twice a week, with 57% saying they take vitamins or dietary supplements.

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» Virtually all consumers (92%) express worry about the environment, with 25% feeling extremely so.

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By Robert J. Morais

Business ethnography and the discipline of anthropology

Ethnographic research on consumers is booming. Marketing research firms that specialize in it abound. Major corporations like General Motors and Microsoft have ethnographers on staff. And well-known advertising agencies like BBDO and Ogilvy & Mather have departments that include or are headed by anthropologists.

With so much ethnography practiced in the marketing and advertising industries, it is disappointing that the technique is often misrepresented and misused.

Ethnography is the description of people's behavior and attitudes in natural settings - where they live, work, play and shop. For the vast majority of cultural anthropologists, ethnography is the principal method they use to gather data. Accomplished with a technique called participant observation over an extended period in the "field," ethnography entails more than simple description. It begins with systematic, intentionally naïve observation and inquiry, but it is informed by ideas about human culture: symbols, codes, myths, rituals, beliefs, values, rules for social interaction, and conceptual categories and perceptions. Professional training provides anthropologists with the techniques to record what they see and hear as well as the analytical tools and scholarship that enable them to design their studies and interpret their findings.

Business ethnography that does not benefit from the guidance of professionally-trained anthropologists is typically in-depth, psychologically-driven interviewing in natural settings with some attention given to the physical environment, such as home pantry checks, for example. Although industry time and budgetary constraints do not allow for extended time in the field, many so-called ethnographic interviews occur over a 90-minute period, too brief for close environmental observation and questioning. (Three to four hours per ethnographic observation and interview is far more productive.)

Some research techniques labeled as ethnography do not even include ethnographers on site. There are virtual online ethnographies that consist of diaries and blogs written by consumers and digital ethnographies that provide consumers with recording equipment and instructions to focus on what they feel is important in their brand experience. Diaries, blogs and first-person digital photography are useful for recording attitudes and behavior from a personal perspective, but reliance on what BBDO anthropologist Timothy Malefyt calls techno-methodologies is not a substitute for the penetrating insights that can be delivered by anthropologically-informed ethnography.

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Fundamental questions

Anthropologists ask fundamental questions that can be revelatory when applied to consumer attitudes and behavior. For example, in their book *Doing Anthropology in Consumer Research*, anthropologists Patricia Sunderland and Rita Denny pose the question, "What is coffee?" They note that by stepping back

and making this query naïvely, one can see that coffee is revealed to be a beverage with multiple connotations about fashion, relaxation, strength, tradition versus modernity and much more.

To further understand the difference between ethnography-lite and ethnography that incorporates the discipline of anthropology, consider the following examples of questions and observations that a trained ethnographer would include in two different research projects.

In a study that focuses on the ways that doctors and their office staff interact with patients, a qualified ethnographer would ask these questions:

- What are the culturally-based definitions of and beliefs about illness, diagnosis, treatment and adherence to medically-prescribed regimens?
- How do culturally-defined status and roles impact interactions between doctors and patients and between support staff and patients?
- What hidden meanings exist in the language used in interactions?
- What unspoken messages are unveiled by observing body language and facial expressions?
- Are there rituals surrounding medicine use and non-use, e.g., non-adherence?
- Are there transformative experiences that professionals and patients have when they are successful or unsuccessful with treatments?
- What social and family factors impact adherence?
- Are there keys to understanding adherence by speaking to members of adherence and non-adherence "tribes"?

In a study on how consumers think about and use home printers, a bona fide ethnographer would ask:

- What are the meanings and processes of printing in their most elemental senses, as if the ethnographer had never seen a printer?
- Can we understand the symbolism of printing by exploring how respondents classify non-printed versus printed matter?

Anthropologists use a construct called binary opposition:

Binary oppositions

Non-Printed Matter		Printed Matter
Intangible	⟷	Tangible
Ephemeral	⟷	Lasting
Public	⟷	Private

- What are the consumer myths, stories and beliefs about printing versus not printing and about different brands of printers?
- How do printing rituals serve as rites of passage that transform consumers from one state of being into another?
- Are people who print and save hard copies different in a "tribal" way from people who see printing as antiquated and wasteful?
- Are there social or business situations that demand or deny printing choices and, if so, why?

These questions and observations would undoubtedly enrich new-product development and marketing communications, helping shape product design, brand positioning and advertising content. Yet most of these lines of inquiry would not be generated by a researcher uninformed by the discipline of anthropology. As a result, an ethnography-lite approach would miss opportunities for marketers that anthropologically-informed ethnography would reveal.

Profound and valuable

A researcher need not possess a Ph.D. in anthropology to conduct quality ethnography. However, knowledge and application of the design, concepts and, as Maria Gracia Inglessis notes, the "procedural rigor" of anthropology will produce more profound and valuable marketing and communications insights. | Q

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By Margaret R. Roller and Linelle M. Blais

A volunteered response

Research-on-research helps American Cancer Society assess the best modes for an ongoing study

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With over three million volunteers, the American Cancer Society (ACS) is the largest cancer-related non-profit community-based voluntary health organization in the U.S. In 1998 ACS embarked on a research program with its volunteers that went beyond any known published research within or outside the organization in terms of scope and depth. The centerpiece of our research - which was conducted every year through 2006 - was the Volunteer Satisfaction Study (VSS). The principal objectives of this study were to provide: an in-depth, detailed measure of volunteer satisfaction at the community level; actionable results for the ACS divisions as well as the national home office; and, a mechanism by which ACS could track or monitor volunteer satisfaction over time.

When considering design modes in 1998, a mail survey using the U.S. Postal Service (USPS) was deemed preferable to either telephone or face-to-face due to the nature and length of the questions as well as cost. For this reason the basic research design for the VSS consisted of a self-administered mail survey conducted among a random selection of "active" ACS community-level volunteers.

However, as Web surveys became increasingly popular among survey researchers, research work within ACS began to shift to this electronic mode, with staff increasingly conducting their own surveys via Web-based tools such as Zoomerang and SurveyMonkey. And, not surprisingly, we witnessed a rising demand for a Web version of the VSS.

Beyond the sheer novelty of online research (it seemed easy, new and everyone was doing it), the staff perceived real advantages to an online solution, including the ease of administration (no mailings), cost savings (no printing, addressing, stuffing or postage), time efficiency (less staff effort, less survey data processing time by the analyst), and increased depth and breadth of response across the volunteer population.

While there is reason for many researchers to be enamored of the relative simplicity, low costs and speed associated with Web designs, the Web mode is not free of administrative hurdles (e.g., maintaining accurate e-mail addresses) or gnawing questions associated with response quality. For instance, a meta-analysis reveals that the Web mode typically results in an appreciably lower response rate compared to other survey methods (Manfreda, et al., 2008), and response quality is impacted by socially-desirable responding as well as the inherent bias fostered by any particular survey mode.

Although the large demographic differences prevalent in the 1990s have diminished, older people, lower-income households, those living in rural areas and/or with less education are still less likely to use the Internet compared to younger, higher-income, urban, educated individuals (Pew Internet & American Life Project, 2008). These differences - particularly age, given that the average ACS volunteer is 50 years - have the potential of negatively impacting the results of a Web version of the VSS.

Analyze the viability

ACS conducted a test to understand whether findings from other researchers' experimentation with survey modes apply to the nonprofit volunteer sector; and, specifically, to analyze the viability of a Web design for the VSS. This study set out to determine the following:

1. What is the rate at which volunteers would respond to a Web survey compared to the traditional VSS paper design?
2. What are the mode preferences among subgroups of the volunteer population?
3. To what degree are behaviors and opinions measured by this study the same or different depending on mode?

4. How complete are volunteers' responses (i.e., the extent of item non-response)?

The research model was comprised of three test conditions - the paper-only ("paper") group (control condition), the paper-Web option ("option") group (similar to the paper segment; however, this group was given the option of completing the questionnaire on the Web), and the Web ("Web") group (all contacts and link to the online survey were sent via e-mail). A total of 4,000 volunteers from the central U.S. were randomly selected to participate in this study. Two thousand of these volunteers were randomly selected from the entire database of active volunteers in this region and then randomly assigned to either the paper (n=1,000) or the option (n=1,000) group. The Web group was randomly selected from the remaining volunteers in the database who had supplied their e-mail addresses (n=2,000).

To preserve the historically-reliable data of the VSS as well as take a true measure of mode effects, every attempt was made to maintain uniformity across test segments pertaining to: the prominence of ACS and its logo in all facets of the research; the look and feel of the questionnaires; the availability of a toll-free telephone help/comment line for respondents; the incentive (all respondents were offered a summary of results); and allowable skips. That is, given that respondents to the paper questionnaire can opt to skip partial or entire questions, the online version generally did not force respondents to respond in order to advance in the questionnaire. One area of variation was the follow-up telephone interviews with non-respondents, which were only conducted with the option and Web test groups.

Results

Rate of response

A total of 1,166 usable questionnaires were returned from active volunteers - 51 percent or 590 were completed on paper and returned via USPS (309 from the paper group, 260 from the option group, and 21 from the Web group) while 49 percent or 576 were completed via the Web (498 from the Web group and 78 from the option group). Figure 1 shows the rate of questionnaire return across all three study groups. Within the first three weeks in the field, significant differences emerged, with the paper group reaching a return of 31 percent compared to only 25 percent and 21 percent in the option and Web groups, respectively. At the end of three weeks, telephone interviews were conducted with non-respondents in the option and Web groups. These follow-up interviews resulted in conversions, lifting the ultimate rate of response to 36 percent within the option group and 27 percent for the Web segment. The paper group ended with a response rate only slightly higher than in the first three weeks (34 percent).

Based on return rate alone, it would appear that offering an online version of the VSS may not be worth the effort. The return from the Web group was significantly lower than the rate of return from either the paper or option group. The relatively low response from the Web group is in line with various industry sources that consistently find a 20 to 30 percent rate of response to an online test condition (Manfreda and Vehovar, 2005; Kaplowitz et al., 2004). In the case of this study, one partial explanation for the low Web response might be derived from the fact that central U.S. volunteers tend to reside in rural communities and research has indicated that rural residents represent the lowest

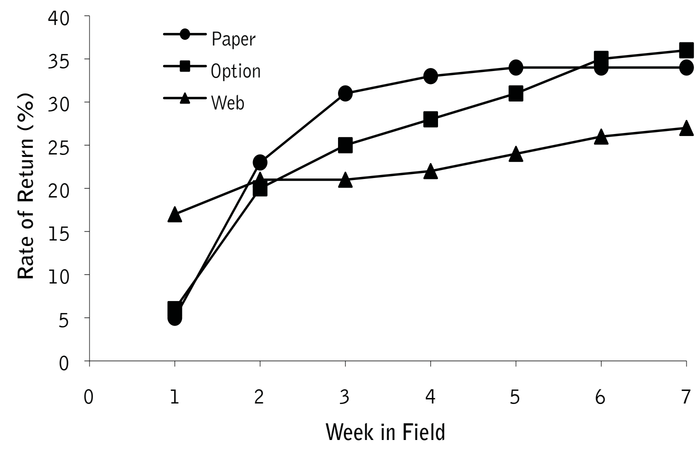

Figure 1: Rate of Return by Test Condition

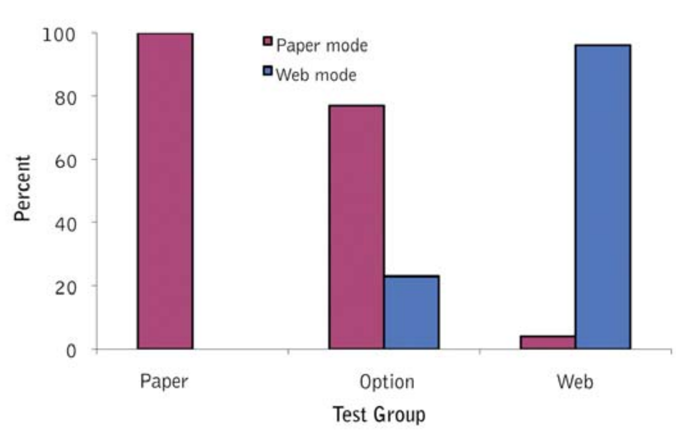

Figure 2: Percentage of Usable Completions Within Each Test Condition by Mode
Note: n=309 for paper test group, n=338 for option test group, n=519 for Web test group.

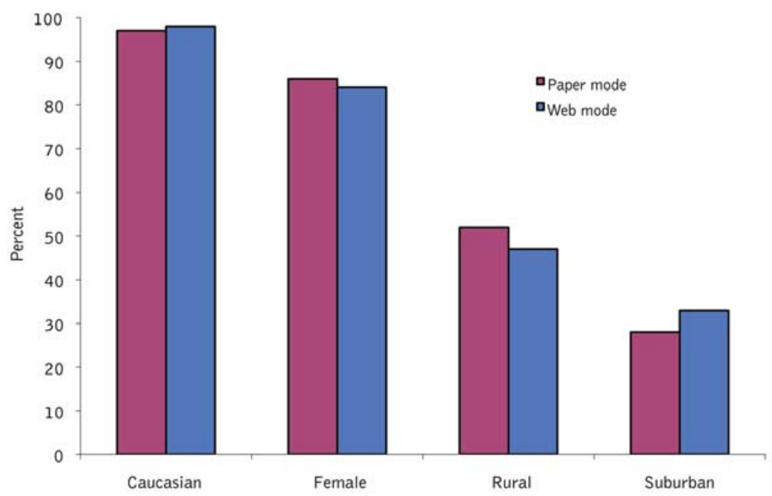

Figure 3: Caucasian, Female, Rural and Suburban Respondents by Paper and Web Mode
Note: n=590 for paper mode, n=576 for Web mode.

concentration of Internet users in the U.S. (Pew Internet & American Life Project, 2008).

Reluctance to respond online is also made apparent by the group that had a choice between paper and online completion (i.e., the option group). This group overwhelmingly favored the paper over the online version (77 percent vs. 23 percent, respectively, Figure 2). The fact that the Web and option groups opted for the mode to which they were initially assigned is consistent with the work of Gesell, Drain, Clark and Sullivan (2007), who found that "respondents showed a preference for the survey mode that was randomly assigned [to them]."

Respondent demographics by mode of completion

Although the online mode generated the lowest overall response, it is important to go beyond response by test condition and compare total completions by mode - paper vs. the Web - in order to understand the contribution of each to the final interpretation of results. In terms of demographics, the biggest differentiator is age, with a median of 50 years among volunteers who completed the paper questionnaire compared to 40 years of age among online respondents. This result, of course, is not surprising, given that Web survey response has shown to be characterized by younger respondents compared to respondents who opt for the paper mode (Kaplowitz et al., 2004).

Other demographic indicators - race, ethnicity, gender and type of community - were nearly identical across modes, with a slightly greater proportion of Caucasian and suburban volunteers completing the Web survey (98 percent and 33 percent, respectively), and a marginally higher percent of females and rural-community volunteers responding in the paper mode (86 percent and 52 percent, respectively, Figure 3).

Type of volunteer by mode of completion

It is noteworthy that fundraising and advocacy volunteers were significantly more likely to respond to the online VSS questionnaire while volunteers involved with patient services were more apt to respond on paper. This is consistent with the fact that fundraising volunteers are typically younger than volunteers overall. This inverse relationship between Web completion and age extends to volunteers' tenure with ACS as well as their association with cancer. Specifically, volunteers responding via paper (i.e., older volunteers) have been an ACS volunteer one year longer (on average) than volunteers who completed the Web questionnaire (five vs. four years), and are significantly more likely to be cancer survivors. Interestingly, however, leadership volunteers (vs. non-leaders) significantly favor the Web mode.

Response differences by mode of completion

Importance attributes

Because survey mode impacts the type of volunteer who responds, it is logical to assume that the results would indicate response differences across modes. While there is a high degree of consistency in the data in many areas, a few notable exceptions are apparent. For instance, significantly more volunteers responding to the paper (vs. the Web) survey "strongly agree" that "staff's support" and a "staff that is willing to listen to me" are important to their volunteer experience at ACS. On the other hand, volunteers responding to the online survey place a greater importance on: project descriptions, having projects that are "matched to my skills," "updates on various volunteer opportunities" and "opportunities to assume greater leadership responsibilities." This makes sense from the standpoint that Web respondents are more involved in fundraising activities and in leadership positions which inherently raise the level of complexity in volunteers' participation with the Society, making them more attentive to project-specific aspects of their work as well as more receptive to various opportunities. Furthermore, the greater importance Web responders place on their skills is consistent with the fact that skills and skill development play a more important role among younger ACS volunteers (Roller and Blais, 2005).

Performance attributes

Possibly because of their level of involvement with ACS, volunteers responding to the Web survey generally rate ACS higher in performance compared to volunteers completing the paper questionnaire. There are several performance attributes where significant differences exist, including the areas of project materials, diversity, recognition, job descriptions, skill development and opportunities. Generally, Web responses are more positive or favorable toward ACS than those from volunteers in the paper mode. This tendency toward favorable responses among Web respondents is consistent with other work in this area (Carina, Hayek, Kuh, Kennedy and Ouiment, 2003).

Communication preferences

Another area where differences emerge between volunteers who completed the paper questionnaire and those who responded online is in preferred communication vehicles (see Table 1). Not surprisingly, volunteers in the paper mode are significantly more interested in receiving a newsletter in the U.S. mail, while Web respondents indicate a higher preference for all other channels, particularly communication via e-mail. The fact that Web responders significantly prefer face-to-face meetings with staff most likely reflects the higher incidence of fundraising and leadership volunteers whose activities are best accomplished through personal interaction.

Item non-response by mode of completion

Item non-response is typically higher among volunteers who completed the paper questionnaire compared to those who completed the online survey. Similar results have been reported elsewhere (Grigorian and Sederstrom, 2005) and have suggested that Web respondents are "hyper-cooperative" due to their level of comfort as well as enthusiasm with the technology.

Table 1: Preferred Communication Vehicles by Mode

	Paper	Web
Newsletter via U.S. mail	28%***	19%
E-mail message or newsletter	19%	31%****
Face-to-face meeting with staff	9%	14%***
Telephone call from staff	6%	9%

Note: n=590 for paper mode, n=576 for Web mode.
Data represents "often" responses.
*** p<.01. **** p<.001

Another explanation for the higher item non-response in the paper mode may be the ease with which respondents can pick and choose which questions to answer, compared to Web respondents, who may fear that not answering a question will result in an error message (even though very few error messages were utilized in the Web design), which may explain why all of the volunteers in the Web mode answered the overall satisfaction question but 3 percent in the paper mode did not answer this question.

An additional explanation points to the types of volunteers responding across modes and the proclivity of volunteers to skip questions in the VSS that are deemed irrelevant to their particular involvement with the Society. So, for example, a significant portion of volunteers responding via paper did not answer the question concerning their preference for e-mail messages/newsletters, possibly because they were so disinclined toward the e-mail option they simply skipped the question.

Open-ended comments by mode completion

Volunteers responding to the Web survey not only answered more questions (i.e., demonstrated a lower item non-response) but also were significantly more likely to respond to the open-ended question asking for their suggestions to improve volunteer satisfaction. Figure 4 shows that 65 percent of the volunteers in the Web mode answered this question compared to 52 percent of the volunteers in the paper mode. The sentiment of these comments (i.e., positive vs. negative vs. neutral remarks) did not differ greatly across modes; however, the length of these comments varied hugely by mode. The average word count of comments made by volunteers responding to the online survey was 13 times greater than the word count among volunteers responding on paper - 268 words per comment vs. 20 words per comment, respectively. This result is in concert with other researchers' work in

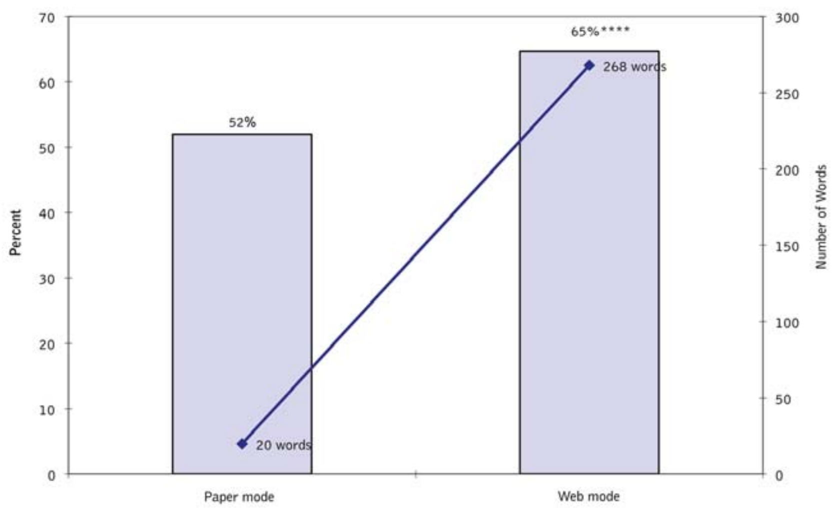

Figure 4: Percentage of Volunteers Providing Open-Ended Comments and the Average Number of Words Per Comment by Mode
Note: n=590 for paper mode, n=576 for Web mode. **** p<.001.

this area (MacElroy, Mikucki and McDowell, 2002; Grigorian and Sederstrom, 2005) and reveals a real advantage of the Web mode as a source of rich feedback from volunteers in terms of the amount or quantity of responses.

There is also some indication that the quality of the open-end comments in the Web mode may be superior to that in the paper mode. A cursory analysis of comments in both modes suggests that comments from Web respondents are more detailed (e.g., references to specific examples or names) and tend to be more constructive (i.e., offer suggestions for improvement) than comments from the paper questionnaire.

Interestingly, however, the readability scores, based on the Flesch-Kincaid Grade Level analysis, from the paper-survey comments indicate an 8th-grade level while comments from the online respondents read at the 7th-grade level. Whether this is a function of the younger age of Web respondents or the informal (even sloppy) writing style many e-mail users have adopted or something else is left for further research.

Carefully weigh

In developing and refining the best possible research techniques for exploring volunteer satisfaction, it is incumbent upon researchers to carefully weigh the advantages and disadvantages of each design mode. In this study we tested the two most viable modes of the VSS - paper via USPS and the Web. The results of this study clearly point to strengths and drawbacks of these modes and suggest that the ultimate design may be a combination of the two.

Benefits of the paper mode

There are certain advantages or benefits associated with the traditional paper VSS. First, response to the control test condition shows that a relatively high response is possible in the traditional format and that the control (i.e., paper-only) group would have met or exceeded the return from the option condition had it not been for the additional telephone contact with this sample, and did exceed the response from the Web group.

Furthermore, the fact that the option group overwhelmingly chose paper over the Web speaks to the comfort factor volunteers have with the traditional VSS (although this result may partly be an artifact of the option group showing preference for the mode by which they initially received the VSS, i.e., paper). The paper mode also enables certain volunteer segments to respond to the VSS that might otherwise not respond if no paper option were given, especially older, longer-term volunteers, those living in rural communities, cancer survivors and patient-services volunteers.

Benefits of the Web mode

Likewise, the Web mode provides its own benefits to the VSS design. Although rate of response was significantly lower than response in the paper conditions, it did provide a greater share of relatively young, Caucasian, and suburban-dwelling volunteers as well as those involved in fundraising, advocacy and leadership activities. The higher incidence in leadership volunteers is of particular interest because engagement and satisfaction of community leaders is critical to the mobilization of volunteers and community systems accessed through their personal influence and networks.

Furthermore, responses to the Web survey are more complete in that item non-response in this study was actually found to be lower in the online mode than in the paper mode. This includes the single open-end question, which garnered a much higher and richer response compared to the paper survey.

Mixed-mode design

While accepting the fact that gaps exist between paper and Web representation - age, economic status, people with disabilities, rural residents, race and ethnicity - it is equally true that these gaps are slowly closing. According to Dillman et al. (2001), a mixed-mode design will "increase response rates substantially," and we believe that our results support a mixed mode (without an option) as the preferred design for research with community-level volunteers.

The lower initial response from the option group in our study suggests that the mixed-mode strategy should not be one of choice but a single mode for each of two samples. It appears that offering volunteers a choice between paper and the Web actually slowed their response, leaving us to speculate that the choice, in and of itself, communicated the notion that volunteers could respond at their leisure.

Increasingly going online

The increase in e-commerce and e-giving has also witnessed its corollary in e-volunteerism. Virtual volunteerism, volunteer-focused Web sites and blogs, e-learning tools and volunteer matching services are emerging daily. Nonprofit knowledge management and relationship management is increasingly going online because of the ease of technology in facilitating interactions and exchanges of services and value.

E-advocacy is a growing strength within many organizations, with volunteer advocates affecting policy change at the local, state and national levels. Youth and college students are organizing online communities to mobilize around special events in real space as well as recruiting volunteers and holding virtual events in gaming communities to raise money and awareness. Cancer survivors are actively seeking support from other survivors through personal blogs as well as in online communities.

All this online activity would suggest an overwhelming acceptance and readiness for a relatively non-invasive online satisfaction survey. However, the growing popularity of the Web does not translate into a majority preference in our overall current pool of community volunteers. The temptation to jump headlong into a Web-based survey of volunteers must be tempered by consideration of volunteers' preferences.

This article calls researchers in the nonprofit sector to resist the urge to assimilate to the "new normal" because everyone is doing it and return to the basics of good survey methodology. Choose your delivery mode based on response rate considerations and quality data collection costs, and on the likely receptivity of your participant volunteer group at this time. Know your volunteer audience, and design accordingly. When it comes to volunteer satisfaction, one modality does not satisfy all. | Q

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Telephone or Web?

The Cancer Society compared online vs. mail surveys but phone vs. Web is another common conundrum for researchers. Enter article ID 20080101 at www.quirks.com/articles to examine the pros and cons of each method.

Trendy method or essential tool?

By Judy Langer
and Jon Last

Ethnography from the client's perspective

The qualitative research field is undergoing change at a more rapid pace than it has in its history, with new (or seemingly new) methodologies playing a greater role. Ethnography or observational research has drawn significant attention recently, not only in the market research and marketing fields but in the mass media as well. Referring to the consumers of his company's products, Procter & Gamble CEO A.G. Lafley has championed "close observation of the boss, and her active participation in the process of innovation." In his book *The Game-Changer* he states that this kind of study "all starts by doing something simple - keenly watching consumers, face-to-face, knee-to-knee and listening, with ears, eyes, heart, brain and your intuitive sixth sense." That is, watching and listening in "immersions," not from behind focus group facility one-way mirrors. Malcolm Gladwell famously advocated ethnography over focus groups in *Blink*, his best-seller, and in speeches to advertising audiences.

Ironically, the market research field does relatively little research on research. Rather than rely on hypothetical statements concerning the value of ethnography, we decided to ask research buyers for their opinions. The rationale was simple: clients have no vested interest in promoting specific research techniques, they just want methods that do the job. This study is a follow-up on one we conducted among clients in 2003 in which we found that the impending "death of focus groups" was premature and, at the same time, that interest in ethnography was definitely growing.

For our study we interviewed 26 research buyers and consultants by phone and/or e-mail; nearly all have been involved as clients in ethnography studies. They represent a wide range of fields.

Our findings suggest several key points concerning the client perspective on ethnography:

- Definitions of ethnography and observational research vary widely among respondents, in sometimes contradictory ways. Nevertheless the people we interviewed agree that in-context research has value to their organizations.
- Despite the perceived advantages, some serious obstacles exist to greater use of ethnography, even among its biggest fans.
- Clients express divided views on the desirability of using a professional ethnographer.

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- So-called traditional qualitative research is used less now by some clients as they shift to ethnography. However, these methods have not been replaced and won't be in the near-term future.

Ethnography's increased popularity was attributed by several clients to the success stories in the media and at conferences, P&G's leadership and to its general trendiness. A packaged-goods client said the company is "using ethnography a bit more than three years ago because our marketing teams are responding to the hype about the term in the marketing press." A consultant noted that ethnography has "had a well-deserved growth curve. I heard it had successes in product introduction. It's sort of the technique du jour. I think it plateaued. You see cycles in research that become big things and everyone wants to jump on the bandwagon to show how sophisticated they are; focus groups started that way."

More pragmatic

Just what is ethnography? Classic ethnography of the academic kind, several clients noted, is grounded in social anthropology, entails participant/observer immersion for a long period and a cultural analysis framework. The market research version is more pragmatic, conducted over a much shorter time, often not by a trained anthropologist. "It's not what social scientists would call ethnography," a consultant-user stated. "You spend a few hours in a person's house, not days. It's a snapshot."

Ethnography and observational research are not synonymous in a number of clients' minds. An insurance industry client, for example, thinks of ethnography very broadly as employing visual and written approaches: "[It] would include most anything that involves collecting data in the [customer's] natural environment. Observation, video ethnography, a day in the life, even diary studies - paper or video - could fall into the ethnographic bucket."

An alcoholic-beverage client said, "Sometimes we do some informal interviews on the street with bartenders or specific consumer groups to bring some flavor and some dimension as a part of a presentation, to bring that kind life to it."

Observation of people's natural or demonstrated behavior - how they prepare coffee, surf the Internet, balance their bank accounts, store products in their medicine chest, process their company's mail, what they talk about at a family dinner, and so on - is a key part of what a number of clients do in ethnographic studies.

A number of so-called ethnography studies described by clients do not include behavior observation. They are instead contextual or on-premise interviews in people's habitats - at home, in the office, at a bar, shopping, at the golf course, etc. These are the real-life places where product usage and decision-making take place. To some extent, ethnography is defined by clients by what it isn't: interviewing in traditional one-way mirror research facilities.

Where things get sticky is on regular Q&A interviews outside facilities that don't make use of the setting for research purposes, except perhaps as background in the video. Girlfriend groups and depth interviews in so-called natural settings qualify in some clients' minds. Other clients, however, vehemently argue that this isn't ethnography; it's just what used to be called an in-home/office/store interview.

One advertising/marketing services client felt misled by a research company. "This firm sold us on ethnography and we thought we'd watch how women do their lives day to day and their retail space, and we had women on their couch or in a coffee bar and it wasn't what we signed up for. It was bad research." A financial-services client stated, "I often hear on-site interviews in someone's office described as ethnography. I disagree. Only if I do something directly related to that environment that I couldn't do in a facility would I describe as ethnographic in nature."

Positive experience

Leaving aside the contradictory definitions of ethnography, all the client-users interviewed reported having at least one positive experience with the methodology. They cite several ways in which ethnography has been of value.

Going deeper. The methodology is considered part of a broader trend in qualitative research to get below the surface and move closer to the consumer to attain deeper understanding of people's real motivations, attitudes and behavior. Ethnography uncovers unarticulated needs, reveals actual behavior, motivations and emotions - things that researchers don't know to ask, that people don't know about themselves and that they don't want to admit to others. It goes beyond the rational reasons people make up to justify themselves. "We have [consumers] open their pantry and tell us why they chose to stock things where they did," a consultant explained. "They may say they're health-and-wellness-oriented but we see things that are not articulated in another interview."

Viewer impact. The level of understanding can be greater from watching ethnographic interviews, whether firsthand or on tape, than from other research. Vivid video brings consumers to life in dramatic demonstrations of actual consumer behavior and is a great way to communicate ideas to internal and external clients and to ad agencies. The same points might come out in other qualitative research, some clients said, but ethnography helps them "get it" on a gut level.

A consultant previously at an office-products company explained, "You get a depth of feeling for what the customer does that goes well beyond the verbal or written description. Watch the administrative assistants going out of their minds. [We knew] this, but until you see how they do it, how they accommodate to the task you don't realize how bad it is. You get more of a personal appreciation of the pain they're going through." Along those same lines, a media client said, "Showing our internal stakeholders the raw video had much more impact than any data points I could provide."

For corporate managers, in-context interviews with customers can hit home. A beverage client stated, "It's more like an in-depth interview than a focus group to get as close to the individual setting as possible, as opposed to bringing them out of their environment. Senior managers have no idea of what the regular consumer is; they're living on their half-million dollar salary and have no idea of the people living on a $45,000 income."

More real. Responses, several clients believe, are better when people are interviewed in their own environment than in a facility. They are more honest and reveal more because their inhibitions are lowered. The environment jogs their memories and enables them to demonstrate their real behavior. "The key advantage is the ability to 'show me' vs. just 'tell me.' While you can have respondents bring some things to a facility, they certainly can't replicate their entire home or work environments. I've actually gone into fields with farmers [and had] respondents really show how something works or something they have difficulty with right in the place where they would naturally use it," a financial services client explained.

Another client said, "Consumers can be inhibited when discussing alcoholic beverages in a group setting so the ethnographic approach makes the conversation more natural and allows for richer insights. By conducting discussions in the consumer's home, either one-on-one or with a group of friends recruited by the consumer, the ethnography has more relaxed, natural setting that's more conducive to uninhibited feedback."

Major obstacles

So, why don't clients use ethnography more? While some clients are frequent ethnography users, others employ it relatively infrequently, despite finding it valuable. A combination of major obstacles get in the way.

Time. Ethnography is labor-intensive for clients involved in the observation and, even more, in the analysis. The market researcher and internal clients spend several full days out of their offices interviewing/observing and traveling. In contrast, facility-based focus groups or depth interviews make it possible to interview more people per day and, of course, respondents come to where the client is. "Dud" respondents and no-shows in ethnography studies waste time because there is no backup respondent in waiting. Not only are facility interviews more efficient, they can also be better, a media client said. "Sometimes you take someone out of the environment and you can focus more. IDIs can be done in sequence, from 9 a.m. to 10 p.m. for two days."

Reviewing, editing and analyzing videos is highly time-consuming - and difficult. "Ethnography is wonderful but takes forever," a financial services client said. "The real time thing is making sense of them when you come back. You have to see patterns; in focus groups it's usually apparent but with ethnography, pattern recognition often takes more time."

Money. Ethnography's cost-per-interview is greater than other qualitative methods like focus groups, and the total study price is often high, even with fewer interviews. Travel expenses and "fancy filming" push costs up. A media client explained, "It's primarily a budget issue. There's just a lot less interest in big-budget, exploratory research. Ethnography doesn't stand on its own as a single project, but can bring a lot of value to a larger project. Unfortunately, it's viewed as a nice-to-have rather than the nuts and bolts of necessity." Another media client put it succinctly: "Mostly, it's a cost/value decision. Big investment to do ethnos, so the need really has to be there."

Convincing management. Some clients would love to use ethnography but cite upper management's resistance to methodology that is unfamiliar and has an esoteric image. "[We] have been trying to educate our internal clients about the value of ethnographic research," a media client explained. "We've come close on a few projects but nothing has materialized yet. I think this is due to the costs, the long timelines, the desire for numbers that can be easily dropped into PowerPoint slides and thus taken to market quickly vs. videotapes from ethnographic research requiring additional time and money to produce a market-ready tool, [and] internal clients' uncertainty about how they would use ethnographic results with their clients."

Samples. In the current research climate, so sensitive regarding data quality, some clients raised concerns about respondent authenticity, amplifying the oxymoronic client concern that qualitative research be more "representative." Even judged against other qualitative methods, the sample size for ethnography is usually very small. "The sentiment is, do we feel comfortable just doing six interviews?" a beverage client explained. "There's comfort with numbers even though the information may be much richer [with ethnography]."

A media client raised other questions about participants: "The sample may not be representative. Who allows a stranger to come into your house? 'Can I go shopping with you? Watch you doing your laundry? Where you keep your toilet paper?' Are these people more trusting and outgoing? More desperate to be listened to? More likely to think their opinions count?" Recruiting for ethnographies can be "super-intensive," some clients noted. People are often hesitant to have strangers come to and spend hours in their home or office, watching and recording their activities, disrupting their routines.

Pigeonholing. Ethnography's value in broad exploration seems to limit some clients' use of the methodology. "A few years ago we were working hard to understand our consumer targets as people. Ethnography was great for that," a beverage client said. "Now we are building on that understanding with other methods. I'm sure we'll come back to ethnography in the future."

Disappointment. While all the client users interviewed were happy with at least one ethnography project, some were let down in other cases. A pharmaceutical client felt "the ethnographer didn't tie things together. [It was] a litany of what she saw vs. organizing the information in a holistic way that was meaningful." In the case of a methodology still relatively new to clients, dissatisfaction with a project can affect future use more than with established methodologies.

True behavior

Some clients question whether ethnography does in fact reveal people's true natural behavior and attitudes, which is supposed to be its key value. Participants may put on a show, try to make themselves sound good to interviewers (as they do in other types of research), clean their house before the visit, and so on. A golf equipment client said, "I can't help but feel that there's some real grandstanding going on. We'll accompany a golfer into a retail environment, and he'll pick up and rave about the benefits of the hot and costly brands. Yet, when we conduct purchase diaries, there's a lot of knockoff product being purchased."

Questioning the effect of observers, a media client who conducted informal girlfriend-type interviews commented, "It felt so contrived. Too many people were watching. The whole idea was it is more relaxed and I agree with that. But it's clear that there are four people sitting along the wall doing nothing. If you're hiding behind the mirror in a focus group, you disappear. But not if you're taking notes [in the room]."

The reality issue may be caused by the client company who searches for the "ideal customer" and/or produces a highly-edited video that makes their brand look good. (Needless to say, this occurs in other types of research as well.) Some clients talked about going undercover to do their "ethnography," pretending to be a fellow customer, grad student conducting research, etc. Clearly, there are ethical as well as methodological issues here.

Who should conduct ethnography?

Clients interviewed are sharply divided in their preferences concerning who should conduct ethnography: a professional ethnographer, a "regular" qualitative researcher or the clients themselves. Since market research's version of ethnography is admittedly very different from the academic type, it may not be surprising that some clients do not feel a need for a professional ethnographer's approach and cultural analysis. Some clients said what matters most is the individual researcher's skills more than that person's background. "The cultural anthropologist will probably do a better job than someone who doesn't have the necessary skills," one client said. "There are trained people who don't do a good job and untrained people who have an instinct for asking questions in a non-intrusive manner."

Cultural anthropologists and, to a lesser extent, researchers with an academic background in social sciences and psychology, bring special training to ethnography. A financial-services client believes that "an anthropologist or sociologist [uses] a toolkit grounded in social scientific models and theories, not gut instinct or impressionism. They use that toolkit to discern significant patterns - traces of culture - in the data. What I look for is a good ethnographer (not a degree!) who will promise a deliverable that gives me a concise model of client behavior that I can use to start solving a business problem."

Other clients, however, do not think professional ethnographers are the best choice, as they may lack understanding of marketing in general and of the client's product category specifically. Their approach is sometimes to "go broad, not deep," pursuing topics the client considers irrelevant.

Qualitative researchers are preferred by several clients, especially if they have ethnography experience. Moderators are knowledgeable about marketing, probe relevant issues and have an established relationship with the client. "No specific training or background [is] sought, just excellent moderators who are great listeners and interpreters of consumer feedback," one client explained.

On the negative side, a pharmaceutical client found that some qualitative researchers have trouble adjusting to ethnography. "I've run into in global situations with poorly-trained moderators. There's not a really robust understanding of how observing can help a marketing person. Some moderators think they have to be very active and some of it is 'show me your medicine cabinet.' They don't get it."

Clients conduct ethnographies themselves in some cases. In addition to their market research experience, they have the advantage of knowing their category and brand. Some respondents, however, cited their lack of expertise in ethnography, scarce staff resources and time, and the fact that they may be too close to their product.

One method

Despite some pronouncements in the media that ethnography should replace traditional qualitative methods (focus groups and depth interviews, especially the former) none of the clients had dispensed with these approaches. Instead, they consider ethnography as one method in the qualitative toolkit. The increase in ethnography has indeed reduced several clients' use of facility-based interviewing but has not replaced it:

"*I don't think ethnography will (or should) replace other types of qualitative research! I look upon ethnography as just another research method - it's a means to an end.*" (media client)

"*Ethnography doesn't replace focus groups. We utilize both and have gotten good at using each method.*" (financial services client)

"*Most people still have a comfort level with other [qualitative] approaches. They wouldn't want them to be reduced. Also, the separate issues that are addressed by traditional methods haven't gone away.*" (beverage client)

Regular part

Focus groups are no longer the automatic qualitative choice for clients, especially early in the research process. Ethnography is now more a regular part of the research repertoire (along with in-person and phone depth interviews and online qualitative methods). "Many of my internal clients, instead of saying, 'Go set up focus groups,' said, 'Go set up ethnographies' because they got more insights. They got a taste for it in a real setting rather than in focus groups," a consultant said. "The ethnography took the place of or reduced the use of focus groups to generate ideas, but once they needed to be developed or were in early rounds of testing, we'd use focus groups."

Clients see the different methods as having different roles, sometimes on the same project:

- Ethnography for strategic understanding, exploratory research at the beginning of the creative/innovation process.
- Focus groups/IDIs for tactical issues - reactions to stimuli (ads, visuals, concepts, etc.), often ones that have been developed in the first phase. In a sense, these methods have been repositioned in some clients' minds.

"*I think of focus groups to get narrow things. If I have eight concepts, [I want to know] what's working better than another, what language is working better, etc. When I'm trying to get something deeper and something I didn't know how to ask, I would use one-on-ones. If I have the choice and the time - there's time and money associated with ethnography - I'd opt for ethnography hands-down every time.*" (pharmaceutical client)

"*Focus groups still have their place for consensus-building and culling down ideas. For innovation, I do think ethnography has an advantage.*" (consultant)

"*[Ethnography's] one of many methods, doesn't come close to replacing traditional qualitative. Relatively little [research we do] is the exploratory stuff that ethnography's good at. We do message development, ad testing and I don't see ethnography doing that.*" (pharmaceutical client)

"*It's rare that we do a study that doesn't have both ethnography and focus groups. They both have their purposes. We try [ideas] out in the focus groups based on earlier insights and ideas drawn from the ethnography. Focus groups yield time and efficiency that can lead to tighter and more effective surveys.*" (financial services client)

Continue to grow

Ethnography's use will continue or grow over the next few years, some clients believe. "This big push is for deep consumer understanding, to look at the consumer landscape, to identify what consumer you go after and what the advertising should be. A real call to the researcher to bring these people to life," a consultant said. (We also suspect that as ethnography becomes more of a mainstream methodology, senior management may become more receptive.)

Others think a plateau or drop-off may occur. Some large corporations already using ethnography extensively may not do more, and smaller companies are less likely to start because of budget issues. Disappointment with past projects puts some off from using/recommending it.

A key obstacle is today's tough economy, a major issue for a method already seen as high-priced. "If everything were okay economy-wise, it could increase. Trying to know our people in a deeper way, that's a trend, but ethnography is expensive. Things are hurting so it would be doing well just to stay the same," a pharmaceutical client said. Interestingly, a beverage client said the tough times could work in the method's favor: "Everyone's experiencing the financial squeeze and research programs are being cut back, everyone's operating with minimal budgets. In some cases that might mean the mega-projects will fall by the wayside and people will rely more on ethnography." | Q


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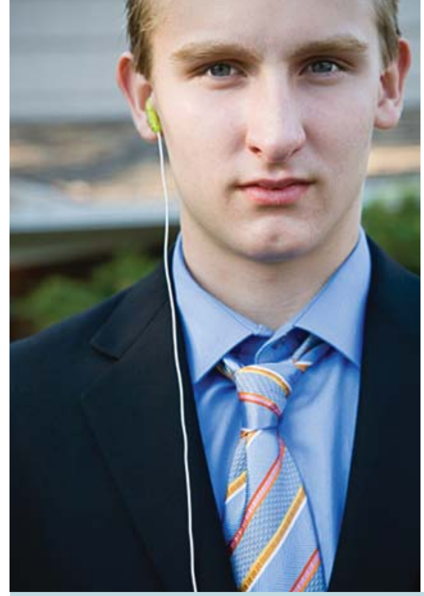

By Chris Hubble and Bill Russo

Today's tough economic environment and rapidly-changing consumer landscape make strong brands more valuable than ever. Only strong brands are able to justify a price premium in difficult economic climates, and as Millennials start to exert greater purchasing power, consumer criteria for what makes a strong brand are changing almost as quickly as media is fragmenting. Reaching today's youth and understanding brand perceptions continues to challenge many researchers. How important is brand equity to purchasing decisions? What makes a strong brand? Are Millennials really any different from their more mature peers?

Many are pessimistic

Like most of the rest of us, Millennials are pessimistic about the current economy. However, there are approximately 80 years of research showing that during recessions the biggest sales increases occur among brands that invest the most in brand marketing. Most notably, a study conducted by McGraw-Hill Research Laboratory of advertising performance during and after the 1981-82 recession analyzed 600 companies. The findings showed that companies that maintained marketing investment grew sales and outperformed companies that cut marketing investment. Brand, therefore, is important.

As we ride out this crisis, it is important to note that it is the first such cycle for the 100 million Millennials in the U.S. If this generation is purported to be so different from previous generations, what then might their response be when faced with tough economic times?

What makes a brand great to today's youth?

To learn the true importance of brand in a purchase decision, e-Rewards and Hall and Partners conducted a conjoint analysis of 20 brands in a mix of categories: fast-food, fashion, laptop computer and automotive. Using an online interview approach, e-Rewards recruited 3,000 Millennials (including a test split from the e-Rewards direct youth panel versus parental-permission recruits), Gen Xers and Baby Boomers to be interviewed about brands and multiple product attributes: considered versus impulsive decision-making; utility versus fashion; high-cost versus low-cost, etc.

In each case, brand was a major factor in people's choices, regardless of generation. There were, of course, certain basic criteria that brands had to meet across all categories (e.g., great product performance and reasonable price), but the role of brand was consistently in the top three or four predictors of choice regardless of category or generation.

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There were some generational nuances. Millennials placed greater importance on brand in image-driven categories, especially in the laptop computer category. Conversely, Gen Xers and Boomers placed price as the top concern in every category except automotive. Regarding brand commitment, Millennials seem to be more open to multiple brands and having more than one favorite, while Boomers are much more inclined to have a preferred brand or set purchase habits. On the one hand, this may simply be because Millennials have had less time to establish clear brand relationships or buying habits. On the other, it would also be consistent with much that has been written about them. For instance, a recent Huffington Post article summarizing the book *Generation We* described Millennials as "post-partisan" and "rebellious against brand loyalty."

Variety of tools

It's important to classify who we want to reach. Anyone born after 1982 is considered to be a Millennial. These individuals are usually optimists, team players, open to change, civic-minded, tech savvy and media-saturated. What does this mean for brands? In order to drive youths to their products, they must incorporate a variety of tools to ensure brand loyalty and advocacy.

Brand loyalty primarily results from an outstanding product. Derived-importance analysis showed that Millennials are just like their predecessors and have high expectations for great product experiences. In a world inundated with marketing tools and tactics, people demand products that are genuinely better than other brands. They want products that fit within their lifestyle, are worth the money and are something that they would recommend to others.

Secondly, brand loyalty stems from product innovation and differentiation. Youths consider brands that are evolving and generating a lot of buzz to be the ones that stand out from the rest. Perhaps this says more about the pace of business change and technological advancement than about Millennials. Millennials in particular are early adopters of technology and most things new, so brands will need to work even harder to meet consumer demand for better products moving forward.

An emotional connection has been important since the 1970s, when brands started to employ pull rather than push marketing strategies, but historically this has primarily meant a personal connection or relevance to Gen Xers and Boomers. Millennials, on the other hand, believe products should provide an emotional differentiation or connection that is more altruistic or, as they see it, genuine. They believe their favorite brands should enrich lives by answering a real need that otherwise would not have been addressed. Two-way communication is valued, and Millennials want to know that the brand cares about its customers.

Increasingly, Millennials in particular are also demanding corporate transparency and social responsibility as a result of an emerging importance for brands and companies to commit to the triple bottom line (financial, social and environmental progress). Evolving reasons for loyalty to a brand include a sense that the brand is environmentally conscious, that it embraces a mission that extends beyond profits and that it demonstrates responsible and sincere behavior. For example, in the fashion and laptop categories, Millennials placed a much higher importance than Gen Xers and Boomers on such issues as two-way communication, responsible behavior, fair treatment of employees and a true corporate mission beyond just profits.

A reason to get involved

How do marketers approach this generation of young consumers? Priorities have shifted as marketers strive to keep up with this generation during a time of economic uncertainty. One clear evolving brand priority that we found is the need for a clear reason for the brand "being," that is, that the brand achieves something that is important to them. Brands, therefore, need to give Millennials a reason to get involved or allow people to feel like they are part of something and possibly connect them to others who are involved, formally or informally.

How? Provide entertainment through interaction. Give them something fun, social, thought-provoking and not-too-taxing to do. Social networking Web sites are a contemporary form of participatory entertainment. Anything that offers some lighthearted interaction with others or with media, through tools such as commenting, voting, personalizing or attending events, satisfies the need for entertainment. Also, provide ego-reinforcement. Give them a sense that they are important and have stature. This can drive participation since introducing friends to something new can provide a rush of energy and authority that is a form of social power.

Evolving priorities

Regression analysis showed the traditionally-recognized drivers of choice remain important, but as shown below, other factors are beginning to become more important due to the evolving priorities of Millennials.

Brands as myth-makers. Ivory is the prototypical example of the brand that behaves like a myth-maker, creating and repeating a clear symbolic story attached to a brand, in this case purity. But, it may be falling behind the times. In fact, as of May 2006, Ivory was one of the least-successful brands in P&G's soap portfolio. Perhaps people have started to lose interest in commercial mythology.

Brands as game-show hosts. The past five years have ignited a wildfire of new kinds of corporate schemes to compel the customer to do something, anything, related to their brand, such as making a video, customizing an Internet plaything or joining a forum. Sadly, overall it's not working out as well as hoped. In 2007, U.S. office supply retailer OfficeMax launched its Elf-Yourself holiday e-card toy that allowed you to transform yourself into a singing and dancing elf by uploading a photo to a Web site. It was fantastically successful and catered to a tech-savvy generation - receiving 36 million hits in just a few weeks, a landslide of favorable blog mentions, and perhaps the crowning achievement: a 20 percent increase in holiday traffic to officemax.com. But *Ad Age* reported that it was tough to say whether this bump in holiday traffic translated to any rise in sales. Furthermore, as some industry bloggers pointed out, what did all this have to do with the OfficeMax brand? And that's where the disconnect habitually happens between Millennials and game-show-host brands.

In the words of Sarah, a Millennial discussion group participant, "I think it's an attempt to make consumers feel more empowered about their purchases. But to me, it is a false empowerment, and the real power still lies with the company/advertiser, who is getting more influence than the consumer is getting real choice or power."

Brands as gardeners. A gardener, first and foremost, works hard to create something of value. A gardener is constantly planting seeds and going for growth. A gardener watches what thrives and what withers; is flexible and pragmatic; and is open to the reality of what he sees each morning when he begins his day's work.

Gardener brands are all about creating a magnetic, inviting world that people want to take part in. Simply speaking, they are not incentivizing people to act; they are inspiring them. The Method brand behaves as such a gardener because it constantly waters, feeds and prunes the attractive bed of ideas it has seeded. The embodiment of the brand are founders Eric Ryan and Adam Lowry, who hated cleaning in college and wanted to create a better and more interesting way to clean. The substance of their brand is a fantastic and unique product: biodegradable soap, in recycled packaging, with great design. And this rock-solid basis has made people want to get involved with the brand - something that Method has

Observations about online youth surveying

By and large, youth today are recruited for online research from adult panels, whereby the invitation to participate is sent to the adult panel member who has opted in, and a request is made for him/her to allow his/her teen or young adult to take a survey. The concern has long been how to validate whether the survey is taken by an actual teen or whether the adult simply takes the survey on the teen's behalf in order to qualify for the incentive.

So, when designing the study profiled in the accompanying article, a separate youth sample was recruited via parental consent. This group was then compared with the youth from the u.talk.back Opinion Panel, who are recruited from specialized youth sites. Youth opt in directly, so they have their own rewards/incentive account in their own name, and the survey invitations go directly to the teens' e-mail.

When we compared results between the two sample sources (parental-permission versus direct-to-youth), respondents from the u.talk.back Opinion Panel were much more likely to associate with youth brands, such as Urban Outfitters (versus Eddie Bauer among the parental referrals), and there were stark differences in terms of language among one-third of the parental referral "teen interviews," which suggested a generational gap. For example, take these two open-ended responses:

"*SWF seeks long lean pair of soft brushed cotton slacks to spend comfortable weekends walking by the lake and swinging on the front porch.*" - parental permission [anonymous]

"*Hi, I'm a Senior and I love the color pink! I want to be an AKA [Alpha Kappa Alpha] so it should not come as a surprise that I'm looking for a mint green or pink car!!!*" - direct-to-youth panel [anonymous]

Additionally, there were other differences among the two groups:

- Automotive parental-permission Millennials placed a greater priority on safety (perhaps reflecting parental instinct?).
- Parental-permission Millennials are less optimistic about future household finances (45 percent expect to be better off in 12 months versus 54 percent) - in line with Boomers' expectations (46 percent).
- Youth-panel Millennials are more likely to be involved in purchase decisions.
- Youth-panel Millennials have stronger affinity for youth-oriented brands.

As evidenced above, there is a strong suspicion that a high proportion of parental-permission responses were completed by adults on behalf of their young adults and teens - compromising sample and results. And, at the very least, parental-permission Millennials seem to be not as involved in brand decisions as those opting in to participate directly.

sensitively cultivated through its "people against dirty" mission. The combination of efficacy, environmental friendliness and aesthetics, qualities admired by Millennials, has made it easy for the brand to find passionate activists.

New considerations

So while the same principles exist, there are some new considerations/principles for brands that wish to achieve brand loyalty and create brand advocates among Millennials:

Make room for others. In the broadest sense, Millennials are willing to connect with participatory brands, and participatory brands are those which have created some role for consumers to play beyond making transactional purchases. This is about giving young people a role to play beyond making purchases. For example, the California Milk Processor Board has reached out to high-school students to develop new ad campaigns, and the effort is based on a genuine question: How can high-school students help the Milk Board really understand how to promote health among their age group? The whole exercise is made more meaningful because it's tied to learning how advertising works and what an ad career would be like.

For some participatory brands, this means that the end goal is to place the consumer at the heart of its innovation or communication processes. This is a particularly useful strategy for brands operating in categories of constant change and which genuinely need people to be a part of their every forward step. To know where to make room for others requires active and constant listening on the brand's part.

Have a mission, not a mission statement. True missions are not only the realm of small, entrepreneurial challenger brands. Consider Dove's Campaign for Real Beauty - a single-minded mission to change current definitions of beauty. The Dove team brought this to life in a variety of creative ways, from customer-led self-esteem workshops for girls to viral videos about how makeup and technology create a false image of beauty. However, even a true, deep and enthusiastic mission only works if it is aligned across the entire organization.

Create exceptional products. Aim high and create from the brand's heart. For example, Target's commitment to style-for-value comes from this place, and having real contributing designers adds to the sincerity and truth of this program.

Enrich people's lives. Genuinely seek to add value. In many cases, this means adhering to social and environmental standards, committing to financial, social and environmental progress. That's why people feel good about brands like American Express, a brand well-known for its philanthropic giving and big-picture view. Their Members' Project generated enthusiastic participation, with members submitting change-the-world ideas to the AmEx community, which, in turn, voted on which should receive significant funding from AmEx.

Make the inside reflect the outside. Imagine you meet a person who talks about environmentalism all the time and tries to get others to be more environmentally conscious. If you were to then find out she drives an SUV and goes everywhere by chartered plane, what would you think? Brands work the same way. Look at the way Wal-Mart's back-to-school decorating ideas Web page became a forum to highlight the retailer's unfair labor practices; or the way Chevy Tahoe's invitation to create your own ads became an avenue for anti-SUV backlash.

Participation is very tough to navigate if inside doesn't reflect outside; Millennials live in a culture of exposure, where social networks and celebrity obsession are second nature, and they expect brands to be equally as transparent.

Use meaningful creativity and innovation. Rather than churning out line extensions to capitalize on a brand name and calling it innovation, participatory brands keep themselves interesting and surprising through meaningful creativity, expressed in every aspect of what they do. These are brands like Jones Soda - an old dog in the Gen X world but considered by Millennials as the first interactive soda company - inviting consumers to suggest the flavors they want and take part in designing the bottle by submitting photos that reflect their real lives. Jones is focused on meaningful innovation by offering soda flavors people want, not innovating for the sake of innovating.

By allowing customers' unique personalities to be the face of the company in package design, it backs up its commitment to making customer tastes a priority. It also stays focused on creating the highest quality product possible.

Remember all four Ps. Finally, with all the changes going on, it's easy to forget the basics of marketing. All four Ps - product, price, place and promotion - need to be aligned with the brand's mission. When a brand lives in places that don't fit with who it is, young consumers sense the dissonance. When Innocent, the well-loved U.K. smoothie brand, decided to offer its product at McDonald's, it caused uproar among loyalists. Innocent, as a participatory brand, took advantage of its online forum to explain how its choice reflected its values, as one adult to another - but it still left many uneasy with the move.

And it's just as bad when a brand's price sends the wrong message; loyalists of Apple (a brand Millennials in particular admire) who bought the iPhone early felt cheated when Apple dropped the price significantly just a couple of months after launch. Luckily, Apple picked up on this quickly and gave its loyal early-adopters rebates!

Stay relevant

Reworking brand strategy to encompass Millennial brand priorities may be what is required to stay relevant in a bad economy and an aging society. Create products and brands that better connect Millennials to others involved, that provide youths with a sense that they are important and that offer entertainment through interaction and you may find an audience ready and willing to promote brands and products through sharing and advocacy with their peers. | Q

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Research on-the-cheap

By Bonnie W. Eisenfeld

If you have little or no market research budget, should you forget about market research and just wait for a creative brainstorm? The answer is no: There are low-budget solutions to help you obtain useful market data. Your brainstorm will be more targeted if market research informs your thinking. If you are planning to launch a new product or service or a new communications campaign or some other new marketing strategy and you need information about current or potential buyers' attitudes, opinions, perceptions and behavior, here are five market research approaches you can try with little or no budget. For best results, try more than one approach sequentially and use the findings from each step to inform the next step.

Five low-budget market research approaches

1. Mine your company's market research files

Someone else in your company or your client's company may already have a recent research study covering the same market, industry or topic that you are interested in. Ideally, these reports are housed in your company's centralized, indexed, searchable file of market research studies. If not, try sending around an e-mail asking your colleagues if they have any studies that can inform your project. You could find that the person in the next office has just the market research report you need.

Try contacting the research vendors that your company uses most and ask them if they have previously conducted a study on that market, industry or topic for your company. If there has been employee turnover in your company, some past reports may have been lost, but your market research vendors may still have copies and will send them to you.

In one corporation where I worked, an entire division was disbanded and all of its research reports were sitting in boxes under empty desks. Luckily I was able to retrieve, store and index them in our central research file. These reports were fairly recent and still useful to other people in the company.

Even research reports that are not current can be helpful in generating ideas or raising red flags that prevent major errors in strategies or tactics.

2. Search for published market research studies

A gold mine of free and inexpensive market research studies lives in cyberspace. If you have the perseverance to tap into this lode, you will be surprised and delighted when you hit pay dirt and learn how much valuable information can be obtained quickly and at minimal cost compared to a customized study.

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Tu Opinión Latina

La voz del consumidor Hispano

Your online source for U.S. Hispanics of ALL acculturation levels

The Hispanic market represents approximately 13% of the total US population and is expected to grow faster than any other population segment, with the buying power to match. Savvy marketers understand the importance of reaching this audience in a meaningful and culturally relevant way, including the key role that language preference plays. To help you reach this increasingly important market, Tu Opinión Latina offers:

- ***More than 60,000 Hispanic households, with an ongoing expansion plan.***
- ***Tactical recruiting from Hispanic hot spots targeting unacculturated consumers.***
- ***Use of both Spanish and English for recruitment and interviewing.***
- ***A customizable acculturation model from a comprehensive set of attributes.***

Acculturation inputs include:

- ***Country of origin***
- ***Years in the U.S.***
- ***Language preferences (home & away, spoken & written)***
- ***Media habits and usage***
- ***Panelist and household demographics, plus many more***

About DMS Research

Founded in 1995, DMS leverages its full-service heritage to provide today's sample-only clients with a level of research knowledge and sophistication unseen with other online sample providers. You can expect DMS to deliver executional excellence given our depth of research experience.

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I have found published studies on just about every market, industry or topic that I have researched. In some cases, these studies included comparative information on specific competitors' market shares, advertising effectiveness, customer satisfaction, corporate reputation and other key comparisons. I have found forecasts of planned purchases, estimates of current and future market size, buyers' attitudes and motivations, new segment opportunities, reasons for non-usage, drivers of demand, best practices and problems and issues in an industry.

Market research surveys are sponsored, published and distributed by research companies, nonprofit organizations, consultants, publications, industry, professional and trade associations, and government agencies, and many of these studies are available on the Web. If your company belongs to an industry, professional or trade association, find out how to get access to the association's proprietary published research reports.

I have found that it is most efficient to search online library databases for excerpts of market research studies published in business and news journals and then go to the Web site of the sponsor or publisher for more details. If you are good searcher and have access to a business library online database, you can do the search yourself. Otherwise, you may have to pay an expert to do it. But the expert searcher's fee is still going to be a lot less money than a customized study.

Published market research studies may be obtained free of charge or, in some cases, for a small fee, which is likely much lower than a new customized research study.

3. Conduct do-it-yourself interviews

You and your team can conduct interviews yourselves with customers, prospects and referral sources at virtually no cost. Generally, this method is most useful for qualitative research because, for practical reasons, your sample size will be limited. In addition, by using open-ended questions and probes, you can obtain real insight into your respondents' thoughts. If you have no market research experience, you should consider using an expert market researcher to train you on developing your questionnaire and conducting your interviews to avoid bias and capture the most important information.

I once worked for a bank that was about to launch a money-market account targeted at the high-asset consumer market. Nobody in the marketing department fit that category and we wanted to find out what would attract those people and their money to our bank. Over the weekend, we each interviewed three people who were current holders of money-market accounts, a total of 30 interviews, and we got a consensus that interest rate was the primary and only variable of importance. Consequently, our bank came out with the highest interest rate and no unnecessary added features, and we captured a huge share of market.

Since that time, I have trained many non-researcher teams to conduct interviews with customers and prospects. These teams consisted of people in marketing, product management, finance, legal or other functions involved with new strategic initiatives. My training workshops began with a brief overview of interviewing techniques, followed by break-out groups in which workshop participants role-played interviews. Attendees each played the role of interviewer, respondent, note-taker or observer. After each role-play, participants were debriefed and gave their opinions about the experience. The workshops allowed them to be involved in the research process and to share their concerns in a non-threatening environment.

Participants made a lot of mistakes during the training, as you would expect. Interviewers needed to be trained to ask open-ended questions, listen to answers, probe and not be leading, defensive or judgmental. Note-takers needed to be trained to write what respondents say in respondents' own words. (Audio recording is better but cannot be used without respondents' permission, so note-taking is still an essential skill.) At the end of the workshop the group discussed what they learned from the content of the interviews.

Participants reported that after

they had conducted real-life interviews, they appreciated the training more because they had learned from their mistakes and were better able to obtain useful information from the respondents.

4. Consider omnibus panel research
Omnibus research means that you can add one or more questions to a study that is shared among several clients. Both telephone and Web panel market research companies offer omnibus research. You can get a couple of questions fielded for a lot less than a customized study. The panels are made up of pre-recruited households in all demographic categories using a national probability sample. The omnibus panel method is particularly useful when you need to obtain quick and customized information not available through published sources. This method is an option for quantitative market research only and generally applicable only for consumer markets.

5. Distribute self-administered questionnaires
Distributing self-administered questionnaires on-site (for example, to visitors or customers), via e-mail or on a Web site is a method that can be implemented more cheaply than approaches requiring interviewers or moderators. Although it may mean sacrificing systematic sampling procedures, the self-administered questionnaire method still enables you to obtain usable data.

Self-administered questionnaires can generate not just quantitative measurement data but also qualitative data such as new issues, ideas and motivations. The design of the questionnaire is the key to obtaining detailed write-in qualitative data. Each scaled question should be followed by an open-ended question about the respondents' reasons for his/her rating or suggestions for improvement or some other question that needs a write-in response. In order to motivate respondents to write detailed responses, I recommend leaving a lot of space for them to say everything on their minds. One line will not do it.

In a research project I conducted, the objectives of the research were to measure customer satisfaction and to obtain ideas for improvement. In these cases, the budget allowed us to use only a self-administered questionnaire, distributed on-site and on the Web site. While findings showed that customer satisfaction ratings were generally very high, respondents wrote a great many suggestions for improvement, leading to many opportunities for increased business.

Using self-administered and easily-distributed questionnaires eliminates some but not all costs. You still may need to pay an expert to assist you with the questionnaire development and do the coding, tabulation and analysis.

Sharpen your skills

Is expensive market research better research? The answer is sometimes yes but not always. As outlined above, there are less-expensive research methods that can provide valuable, useful information. While the extra work these methods require may be onerous, the effort you put into them will sharpen your information-finding skills while also stretching your organization's research dollars. | Q ideation

Create or perish?

How market researchers can aid corporate innovation

By Gregg Fraley

Innovation is a hot topic. Has it ever been more clear that it's necessary to have a deliberate and company-wide approach? The demise of the Big Three auto makers and the financial market crisis are both examples of the impact that innovation, or the lack of it, can have on everything. We need innovation, but it's not that simple, is it? Organizations with massive resources and talent fail, while start-ups with nothing but dreams and ideals somehow become market giants in just a few years.

So the quest to discover how to innovate is ongoing. New books pop up on the shelves all the time, and consultants proclaim to have The Answer to how it could, or should, be done. Most of the books or articles about the topic, with a couple of notable exceptions, tend to focus on one of two things: 1) a particular tool, technique or method, or 2) a dynamic leader who made it all happen. I call this innovation via the "silver bullet," and I think these books are interesting because they have good ideas. What they lack, for me, is a sense of the big picture. In this article I'm going to present a model for a holistic approach to the complex challenge of organizational innovation.

There is nothing at all wrong with tools or visionary leaders. They are both important. My contribution to the debate is simply this: innovation is not one thing, it's everything. It's not doing an activity; it's living, breathing, eating and waking up in the morning in innovative mode.

An organization needs a deliberate, formal and holistic system to enable consistent innovation. Adopting a particular tool, technique or hiring a dynamic and charismatic leader isn't going to get it done for you in the long run. What will get it done is a holistic approach that blends many complex elements into a gestalt that is greater than the sum of its parts. And there are many parts, with complex relationships.

Market researchers are intimately involved in innovation, of course. I'll suggest here there are opportunities for them to have more extensive and holistic involvement.

Somewhat telling

Business leaders often express their advocacy for innovation. I find it somewhat telling that you rarely hear a leader mention creativity. Yet that's where it all begins. Innovation is generally understood to mean the

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successful introduction of a new thing, method, product, process or service. It is distinguished from creativity in that it requires implementation. Theresa Amabile of Harvard Business School puts it well when she says, "All innovation begins with creative ideas … we define innovation as the successful implementation of creative ideas within an organization. In this view, creativity by individuals and teams is a starting point for innovation; the first is necessary but not sufficient condition for the second."

Creativity then, is a necessary prerequisite for innovation. So, if you're seeking more consistent innovation, wouldn't it make sense to return to the fundamental thinking that gets you there?

Not so helpful

Creativity is hard to define. A simple definition is "novelty that's useful." For the purposes of looking at innovation, however, that definition is not so helpful. It doesn't give us much sense of how creativity might happen, or not happen, in an organization. Mel Rhodes' early research on creativity (he wrote his seminal paper, "An Analysis of Creativity," in 1961) provides a useful way of looking at organizational creativity. He breaks it down into four factors - the "four Ps" of creativity. Visionary leaders would do well to get a sense of how their organization supports creativity and ultimately innovation by looking at the four Ps: people, product, process, press (environment/culture).

I would suggest that unless each P supports ongoing innovation you are going to have problems because creativity will be suppressed. Addressing one P might only exacerbate a challenge existing in the others.

Let's examine each P and look at its impact on innovation, and see where market research might do more to assist.

People

There's nothing more basic to innovation than having the right people. The people on the top of the organization chart are critical because they set the table, or empower, the talent below. Steve Jobs at Apple provides vision and focus. He in turn empowers excellent employees like designer Jonathan Ive, who essentially designed the iPod and iPhone himself. Ironically, Ive also worked for the previous Apple CEO, John Sculley, and the result was Apple's most well-known failure: the Newton. The point is, even excellent people can fail when disempowered or pushed into a faulty vision.

It begins with empowerment but it doesn't end there. The right mix of people is another key to organizational innovation. Thinking is at the heart of creative and innovative efforts. We need to understand how the people of an organization think, and we need to make sure there is a diversity of thinking styles, in order to better facilitate innovation. More diverse teams are more likely to come up with breakthrough ideas.

Often overlooked is the research of Michael Kirton, who has proven the effectiveness of innovation teams with diverse thinking styles. According to Kirton, you need a balanced mix of people who think "different" and who think "better." Awareness of creative style and thinking diversity is a big step toward more highly functional innovation teams. Diverse teams, however, have a downside: more conflict.

Creative process training and practice also matter when it comes to innovation effectiveness. The studies of Firestien et al, show that those trained in creative practice are more fluid ideators (see, "A Review of the Effectiveness of CPS Training: A Focus on Workplace Issues," by Gerard Puccio, Roger Firestien, Christina Coyle and Cristina Masucci).

People and market research

Market researchers could play several new roles in the people P. They might combine traditional research skills such as interviewing with newly developed skills such as facilitation and thinking-style assessments to help innovation managers screen employees to find those that best match organizational needs. The goal would be to flesh out an innovation team's thinking diversity profile. This would require innovative new designs for employee interviewing. In essence, market research could help innovate employee recruitment; call it internal research. A challenge in doing this would be breaking into the unfamiliar world of human resources. However, this can be done, as HR departments often outsource aspects of their mandate.

Another opportunity for market researchers that leverages their existing "soft skills" is getting into innovation team development. Innovation teams (sometimes they are not really teams at all but simply work groups) are often geographically dispersed and only come together infrequently for ideation or meetings. Market researchers with an understanding of how to leverage those rare in-person meetings by helping build team cohesion with their facilitation skills could become more integrated with that team and in the innovation process. Again, new skills would need to be developed by market researchers to offer team-building exercises that are meaningful and customized to the organizational context.

Product

It's important to remember that a product must be novel and useful for the consumer. Design should be an integral part of the innovation process, not an afterthought. Much has been written about product excellence. I'm a believer in two concepts: 1) it has to be a "wow" to consumers, a la Seth Godin's *Purple Cow*, and 2) it has to be a complete solution to some consumer problem, a la Geoffrey A. Moore's theory of "crossing the chasm" of early adopters to broader markets. Market researchers are already intimately involved with product development but there are other areas where their skills could be further leveraged.

Product and market research

Market researchers can play a bigger role in the future by going beyond identifying insights and testing product concepts. First, they need to do more in the area of idea development. Some researchers do ideation and others leave that to specialists. Usually, it's a one- or two-day intensive session to generate ideas and develop concepts. The problem is intensive ideation sessions typically lack enough time for incubation, where better ideas emerge. Further, a lot of good ideas drop through the cracks because if they don't make the "top three" at the end of the day, they are ignored and forgotten. This suggests opportunities to do more Web-based projects, which would save money and keep people thinking all the time. Exploring the use of social media tools to both monitor the marketplace and get quick feedback from consumers is another way to help organizations refine product concepts.

Disruptive innovation is another place where market researchers can provide new services around products. Market researchers often have excellent industry-wide and cross-industry perspectives - why not suggest "adjacency" business ideas for clients to consider? Perhaps as an ongoing service. Disruptive innovation is where the largest growth occurs. If you alert a client to a brand-new business opportunity you are well positioned to be doing a lot of research.

In general, market researchers should broaden their notion of what business they are in to include being in the idea business.

Process

Innovation process has typically been handled in an informal way in organizations. Even in organizations with dedicated R&D units, new-product development tends to be a sporadic and/or cloistered effort. Innovation process today is somewhat analogous to what manufacturing process was in the 1980s, prior to the widespread adoption of MRP (material requirements planning) and ERP (enterprise resource planning) systems. The formalization of manufacturing process over the last 25 years has provided huge leaps in productivity and has seen less-sophisticated players failing. The trend in industry is now toward a more formal innovation process - for the simple reason of survival. But how to be more formal? As noted earlier there are lots of silver bullets but few holistic process answers.

Again, innovation is a complex challenge comprised of many factors. The four Ps give us a handle on what factors to examine, but not on process. I propose that the best type of process for deliberate, formal innovation would be a model for complex problem-solving. A holistic approach is required to deal with the complexity of innovation and the best formal process would ideally include all four Ps. Thankfully, a useful model of this kind exists. It's called the Osborn-Parnes model of creative problem solving or CPS (see sidebar for more detail). If used systemically it could provide a comprehensive foundation for a holistic innovation process.

CPS has been in continuous evolution since the late 1940s when its basic principles were articulated by Alex Osborn (BBDO founder)

A look at CPS

The Osborn-Parnes model of creative problem solving is a holistic process for deliberate innovation. It consists of an assessment and then a series of six steps which are organized into three phases. In fact, the steps don't need to be completed in any rigid sequence nor are all required in any particular instance.

The executive or assessment step of challenge triage will direct organizational thinking toward one of the steps of CPS.

Each step has a convergence part and a divergence part. Divergence is when issues, wishes, ideas or actions are elicited. Convergence is when they are winnowed down to one or a few for further exploration.

Phase one is problem exploration and consists of these three steps:

1. Identify the challenge: Here a vision is imagined in divergent mode, then identified in convergent mode.

2. Facts and feelings exploration: This is the classic research step. A divergent list of facts, feelings and relevant data is made. In convergent mode salient data points are identified.

3. Problem framing and reframing: The original vision is reexamined in light of the salient data and alternate problem frames are generated in divergent mode. One challenge statement is selected in convergence - and transformed into a question that inspires answers to solve the problem.

Phase two of the process is idea generation. It has one step:

4. Idea generation: As many ideas as possible are generated to answer the question converged upon in problem framing. The goal is a breakthrough option or idea. In convergence the ideas are clustered, combined and ultimately one or a small subset is selected.

The last phase, phase three, is getting into action. It has two steps:

5. Solution development: The idea(s) selected in step four are examined and improved using criteria developed/diverged upon for the challenge. Ideas are enhanced by building them up to better match key criteria using additional ideation.

6. Action planning: In this final step a process for implementing the idea is developed and mapped out. Divergent thinking takes place around assistors, resistors and ways to make the plan exciting, and convergence creates a standard action/work plan.

in his book *Applied Imagination*. It was further defined and refined by Sid Parnes, who took Osborn's brainstorming tools and fashioned them into a holistic problem-solving system. More recently, academicians Gerard Puccio, Mary Murdock and Marie Mance reconfigured CPS in the book *Creative Leadership: Skills That Drive Change*. As I see it, their essential contribution is to present CPS as a flexible and not a linear process. Their organic approach makes a lot of sense from a real-world perspective. I presented a version of the model with more everyday language in *Jack's Notebook*, a business novel of creative problem-solving. Practitioners and facilitators around the world have also contributed to a growing body of tools and techniques.

Corporate leaders, managers and market researchers searching for a formal or deliberate innovation process model would do well to adopt CPS as an organizational standard. It would provide a common language and a flexible framework within which to apply a limitless variety of tools and techniques. One of CPS's key strengths is that it involves all four Ps and provides a holistic perspective and an actionable approach.

CPS has three phases: problem exploration, ideation and getting into action. In using CPS one must diverge and converge within each of these phases. This involves a great deal of effort to capture, organize and manage data, especially when you consider the number of significant challenges an organization is processing in parallel. Until recently, this would have had to be handled manually and might have meant that CPS as an enterprise model for innovation was quite impractical. Fortunately, a technology has emerged that makes this data collection, sorting, storage and manipulation easier and more formal and measurable. The term for it is innovation management system (or sometimes idea pipeline management [IPM]). Adoption of these systems, such as Brightidea.com's product set, enables the kind of measurement heretofore unavailable for innovation leaders. While IPM isn't a be-all/end-all solution for innovation process data collection, it's certainly an excellent start. IPM systems have proven valuable in saving money, facilitating ideation measurement and in inviting broader participation in innovation initiatives. In a sense they function as the data "glue" between the theoretical CPS model and the four Ps.

Process and market research

Market researchers could easily use IPM systems to record and archive the data collected over the course of their work. They could also suggest the usage of such products for the inevitable ideation that comes before or comes after their traditional insight work. An opportunity exists for market researchers to get more involved in the ideation process and add value to their service offerings by introducing IPM systems to their customers. This extends their role beyond market research into facilitation, and from determining "what is" into "what could be." Again, this argues for facilitation training.

Press

Rhodes must have thought long and hard to come up with the word "press" to describe the overall environment or culture in which creativity and innovation live. My way of remembering this P is not to think "press," which conjures up images of a fedora-wearing reporter, but instead the word pressure. Because within any organization there are many pressures at work which define the atmosphere, the temperature and the conditions for innovation. Rhodes says that press is the most important of the Ps - the umbrella P if you will - as the other three either work well or don't work at all depending on the quality of the environment.

What is the ideal environment for innovation? Hard to say. It's complex and contextual, and again, an ideal candidate for viewing through the lens of CPS, but here's what I have seen over the course of my career:

- Those who see innovation as integral to all they do, like Apple, or P&G in the A.G. Lafley era, seem to be better off than those who segregate the activity.
- The feeling among the people in an organization that what they are doing is worthwhile, and that their ideas and contributions are valued and used, seems to be a key indicator of innovation effectiveness.
- Intrinsic motivation is what inspires creative thought and subsequent innovation. Rewards are meaningful but not everything; many organizations poor in resources have done quite well because of the dedication and motivation of their people.
- Diversity of thinking matters, and respect for different thinking matters. When an organization hires for thinking diversity and trains/acculturates open-mindedness it gets to innovation faster.
- If it ain't fun you probably ain't doing it right. When people have fun at work they tend to perform better. For more on this concept I refer you to Mihaly Csikszentmihalyi, the author of *Flow*.

Press and market research

Market researchers can play a new role in assessing innovation culture. The skills of qualitative researchers in particular could be highly useful. Essentially, they would do a qualitative study within an organization to assess the innovation culture. Interviews would be designed around understanding how team members feel and what they think about where their organization stands with regard to the four Ps. Researchers could turn their skills toward internal insights. A well-designed interview process could be extremely helpful to organizations, and, a new business opportunity for researchers. Call it an innovation audit.

Look for opportunities

Market researchers with vision will look for opportunities to assist organizations in making innovation more formal by adopting structured processes and models like CPS and encouraging formal idea information systems like IPM. They can also play larger or new roles in innovation recruiting, team-building and cultural assessment. Growing and enhancing one's facilitation skills in the many aspects of innovation process is essential to taking advantage of these emerging opportunities. | Q

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multicultural audience. Additionally, texts can provide a very locally-targeted vehicle for marketers wanting to reach people in the right place at the right time, ready to make a purchase," says Gary Meo, senior vice president, digital media services, Scarborough Research.

In addition to being young and diverse, texters are among the country's highest spenders on cellular services. On average, they spend $87 on their monthly cellular bill. By contrast, all cellular subscribers spend an average of $75 monthly. They are 46 percent more likely than all cellular subscribers to typically spend $150 or more on cellular service monthly. Texters are 12 percent more likely to plan to switch services. They utilize a wide variety of phone features - such as picture messaging, streaming video and e-mail - at a rate higher than that of the average cell user.

Texters are more likely than the average cell phone subscriber to live in a household that owns - or plans to buy - a wide variety of high-tech items, from HDTVs to MP3 players to video game systems. In looking at specific stores, Best Buy is the leading audio-video store for texter households. Thirty-nine percent of texters live in a household that shopped this retailer during the past year versus 27 percent of all consumers nationally. Other leading stores for texter households include Wal-Mart and Target.

Texters are also leading online spenders. One-fifth of texters spend more than $1,000 online annually, versus 17 percent of all cellular users. They are avid online users overall, as Internet applications permeate all aspects of their lives, from household tasks (such as bill paying) to entertainment (such as downloading movies or TV programs) to interaction (such as blogging and downloading a wide variety of content).

When not online or shopping, texters are active, on-the-go consumers. They are 37 percent more likely than all cellular subscribers to have played basketball (as a leisure activity) during the past year, 29 percent more likely to have gone jogging/running, 29 percent more likely to have played tennis and 23 percent more likely to have practiced yoga.

Their interests reflect their youthful demographic and active nature. Texters are 12 percent more likely to have attended a professional sports event and 57 percent more likely to have gone to an R&B/rap/hip-hop concert during the past year. For more information visit www.scarborough.com/press.php.

Online shoppers put their money where their trust is

Consumers may be willing to spend a little more online if they know their identities are protected, as 85 percent of consumers state that trusting the site is most important when interacting on a Web site and sharing confidential information, according to research conducted by Chicago research company Synovate and commissioned by Mountain View, Calif., communications company VeriSign.

In contrast, 9 percent said competitive pricing was most important, and 5 percent said ease of use was most important. Additionally, 93 percent of respondents said they would stop transacting on a site that's not secure.

Findings also revealed that 76 percent of consumers claimed that identity theft is a major concern for them. When asked how they felt about brands that did not protect their online identity, 56 percent of respondents felt distrustful, 17 percent felt disappointed, 13 percent felt betrayed, 6 percent felt indifferent and 4 percent felt let down. Finally, 20 percent engage in fewer online activities due to security concerns.

"Identity theft can be an avoidable evil, and, as our research indicates, security-savvy consumers will put their money where their trust is," says Fran Rosch, senior vice president, products and strategy, at VeriSign. "These consumers understand that the repercussions of identity theft outweigh the few dollars they may be able to save by shopping on a questionable Web site, which is why 85 percent opt for sites they trust."

When asked how much savings they'd expect before considering shopping on an unprotected site, one in three consumers said they would expect at least a 30 percent discount. This finding suggests that businesses that don't provide security measures to gain consumer trust cannot anticipate getting the same value for their goods. For more information visit www.verisign.com.

Organic preference wanes as economy struggles

Despite more organic food and beverage products on grocery store shelves, all is not healthy in the world of pesticide-free, additive-free edibles. In fact, Chicago research company Mintel predicts that market growth rates for organic food and drink will decline, especially as the economy struggles.

According to Mintel, the market for organic foods and beverages should reach $7.2 billion in 2008, an increase of over 140 percent from the $3.0 billion recorded during 2003. But year-over-year, Mintel has seen sales growth slowing. With many Americans now struggling financially, Mintel projects that sales of organic foods and beverages will not rally anytime soon.

"Rising food and gas prices, the credit crunch and economic uncertainty have deeply affected people's shopping habits," says Marcia Mogelonsky, senior analyst at Mintel. "Across the board, Americans are spending less and 'organic versus traditional' is a decision many people are thinking about carefully."

According to Mintel, the price of all food at home increased more than 7 percent in the past year. "To cope with higher prices, many shoppers are simply opting not to buy pricey organic or premium brands," says Mogelonsky.

People are also saving money by reaching for private-label organics, which have exploded in recent years. When Mintel asked survey respondents about the difference between name-brand and private-label organics, three in five (60 percent) said it didn't matter - that they reached for "whatever is available" when shopping. Private-label posts an increasingly large threat to branded organic lines.

"Economic struggles will undoubtedly change the way organic food and drink is sold. But we don't expect people to completely stop buying organics," says Mogelonsky.

"We anticipate more subtle changes, such as the formerly all-organic shopper who returns to traditional cookie brands while sticking with organic produce. These small changes will slow market growth."

Mintel's survey of adults revealed that 47 percent said they purchased organic food in the past year, while 21 percent reported purchasing organic beverages. Mintel GNPD tracked over 2,000 new organic food and drink launches in 2007 in the U.S., and Mintel expects 2008 totals to top that figure. For more information visit www.mintel.com.

Younger viewers change prime-time TV trends

Although overall time spent watching television during prime time has changed remarkably little in the past four years, the specifics of how, what and where that viewing happens are being transformed, according to research from Knowledge Networks (KN), a Menlo Park, Calif., research company. These changes in the prime-time experience are being driven in part by the very different habits of Generation X, Millennials and young Baby Boomers.

According to the report, How People Use Primetime TV, the proportion of people typically watching TV in a given hour between 8 p.m. and midnight has remained stable - with shifts of 0-2 percentage points in each hour since 2004, when KN produced its last report on prime-time television viewing. But there are signs that a more purposeful approach to viewing is being abetted by technologies such as DVRs and the ability to have a TV set to oneself. The proportion of those who report recording prime-time shows has jumped by over 40 percent, from 27 percent in 2004 to 38 percent in 2008. Forty-eight percent of viewers say that most of the time they turn on the TV in prime time with the intent to watch a particular show, compared to 41 percent in 2004. Reported switching in each hour decreased 4-8 percentage points in 2008 compared with 2004.

Looking at the habits of different age groups, the report shows that Millennials (ages 13-29) are 50 percent more likely than young Boomers to say they switch around during prime-time commercial or program breaks (63 percent for Millennials, 42 percent for young Boomers); are more than three times as likely to watch prime-time TV out of their own home at least once a week (39 percent versus 11 percent of young Boomers); and are substantially more likely to say they watched prime-time TV with others in the room (55 percent for Millennials versus 41 percent for young Boomers).

"Prime time represents an important block of time when people want to be entertained and informed," says David Tice, vice president and director at KN. "It is becoming less about the shows' or TV networks' schedules; more and more consumers can find what interests them and watch it when they find time. The more flexibility that media companies offer consumers for watching on their own terms, in their 'personal prime time,' the more viewing hours they will capture." For more information visit www.knowledgenetworks.com.

Hispanic shoppers may be more open to in-store promotions

Hispanics are avid shoppers, unhurried browsers and rate trust as a key driver for store selection, according to Hispanic Shopper 360, a report from New York research company TNS. Additionally, in-store promotions and advertising are much more likely to influence Hispanic shoppers' purchase decisions than the average shopper.

Twenty-four percent of Hispanics cite trust as key store-selection criteria, compared to just 17 percent of the total non-Hispanic shopper population, reinforcing the importance of building stronger brand relationships. "The Hispanic population is ripe with avid shoppers driven by both family size and interest but needs to feel comfortable, welcome and to completely trust their store," says Emil Morales, executive vice president and general manager, centers of excellence, at TNS. "Trips to the store for Hispanic consumers are about more than just availability of goods. It is also largely about service and the store experience. This sense of trust is a key reason that community-based stores (bodegas and supermercados) are successful despite limited selections and often charging higher prices."

Hispanic shoppers are browsers and they are unlikely to rush hurriedly through a store. Only 16 percent of Hispanics found "getting in and out quickly" important compared to 39 percent of total non-Hispanic shoppers. Hispanics are not avid users of coupons acquired outside of the store, but once in-store, their more leisurely shopping habits make them considerably more aware of and open to in-store displays, discounts and other tactics to drive purchases.

Although they tend to know the brands of products they are going to buy before shopping, Hispanic shoppers are open-minded and their final purchase decisions are often heavily influenced by in-store promotions. Thirty-four percent of Hispanics versus only 14 percent of total shoppers are influenced by in-store ads and coupons, and 34 percent of Hispanic shoppers claim to be influenced by in-store price reduction compared to 22 percent for total shoppers. Hispanic shoppers rank coupon redemption lower in their list of lifestyle attributes than total shoppers (ranking 26 versus 74, Hispanic versus total shoppers). Hispanics are also much more likely to know which brands of products they are going to buy before shopping (ranking 22 versus 3, Hispanic versus total shoppers).

Hispanic shoppers shop at more channels than the total shopper population and tend to favor mass merchandisers and drug stores. Convenience stores are big, particularly with Hispanic males. Dollar stores and supercenters are frequented less by the Hispanic population than the average shopper. However, significant positive preferences appeared for supercenters in Texas and southeastern Florida.

Hispanic grocery shopping habits also show a preference for cooking and finding pleasure in cooking, which may indicate increased opportunity for brands specializing in "authentic" ready-to-cook meals or meals that are focused on healthy and fresh alternatives. For more information visit www.tns-us.com.

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and the other half occur in news media.

MI Metrics reports are generated with the assistance of Northern Light's MI Analyst, an automated meaning-extraction application designed for market intelligence, market research and product research.

Pricing is based on the number of companies and other variables included in the analysis, starting at $1,000 per month. For more information visit www.northernlight.com.

ComScore offers online ad measurement database

Reston, Va., research company comScore Inc. has made available its Brand Metrix norms database, a service designed to measure the effectiveness of online advertising campaigns in meeting branding objectives such as heightened brand awareness, improved attitudes toward the brand, increased purchase intent and incremental purchasing. The database is compiled from nearly 200 brand impact studies.

ComScore Brand Metrix relies on the comScore panel to parse differences in behavior and attitudes among consumers exposed to an online ad campaign compared to those who are not exposed. Designed to measure the true impact of online ad exposures, it is different in that it avoids the impact of cookie deletion, which can lead to an understatement of the actual view-through impact of online ads by a factor of 20 percent or more. For more information visit www.comscore.com.

Checkout launched to help test in-store strategies for new products

Ipsos MORI, a London division of Paris research company Ipsos, has launched Checkout as an addition to its suite of shopper research solutions. It is designed to increase the chances of success at launch by optimizing manufacturers' in-store strategy in the competitive environment. Checkout can answer questions such as how the manufacturer's new product will look and perform on the shelves against competitors, if the POS supports the launch by attracting consumers, creating interest and increasing motivation to buy; and how, if tested in a retail environment, manufacturers can keep it confidential from their competitors. For more information visit www.ipsos-mori.com.

Excel-based tool to track trends

WRC Research Systems Inc., Downers Grove, Ill., has released BrandTrend XL, an Excel-based tool designed to help researchers and marketers evaluate the impact of media and marketing on time-based data. It is designed to produce interactive trend charts which display the trend data along with media and marketing spending or events. Analytic screens are designed to allow for dynamic visualization as well as zoom or drill-down analysis of the data.

Product features include the ability to highlight data in Excel and trend it; the ability to handle date-tagged data that can be represented in Excel; questionnaire data from tracking studies; sales or volume data; share data; the ability to add in media and marketing data also from Excel sheets or files; a visualization screen; a zoom analysis screen with diagnostic charts and a written analysis; interactive trend charts; and more. For more information visit www.wrcresearch.com/brandtrend/brandtrendxl.htm.

TNS launches new digital ad effectiveness tools

New York research company TNS has introduced TNS Digital Suite, a generation of online advertising monitoring tools designed to combine cookie-tracking technology with TNS's 6th Dimension Panel to enable analysis of online ad consumption. This panel-based methodology aims to allow advertisers to measure and understand the effectiveness of their online advertising with the same level of analysis as traditional advertising without interfering with the user experience.

Benefits of the TNS Digital Suite include no more pop-up surveys; control for cookie deletion; capturing ad exposure on multiple computers (home/work/school) for each panelist; ad effectiveness measures for the target audience, using the 6th Dimension panelists profiles (over 150 panelist characteristics); analysis through longer surveys (up to 30 minutes long against seven to eight minutes); surveys taken at the convenience of the panelists instead of the current proximate surveys which occur immediately after ad exposure; and analysis available based on frequency and time since last exposure. For more information visit www.tns-us.com.

Gongos goSHOP aims to predict retail success

Gongos Research, Auburn Hills, Mich., has released gongos goSHOP, an online research environment designed to simulate the retail environment; capture real-time data to track purchase behavior; predict in-market performance; serve as a virtual shopping platform to increase flexibility in the navigation of product options with multiple views and package details; allow for the randomization of products to reduce shelf-location bias; and result in a representative sample of consumers.

The goSHOP environment is intended to allow companies to analyze and manipulate data, evaluate heat maps and test take-rates against real-market performance. For more information visit www.gongos.com.

Briefly

Vision Critical Inc., a Vancouver, B.C., research company, has released its online research platform Sparq. The platform features access to tools for transforming text-based surveys into more visually-appealing experiences to improve long-term respondent engagement.

Sparq is designed to allow researchers to build visual questions quickly and independently with no incremental cost. It includes visual questions, community discussion analysis and enhanced respondent portals.

Sparq is also designed to unite one-off surveys, custom panels and private online communities. For more information visit www.vision-critical.com/sparq.

Eularis, a New York research company, has made available its report, Pre-Launch Planning: Priming Your Pharmaceutical Brand for Profit and Success, which examines the concept and components of effective pre-launch pharmaceutical planning. The report describes the phases of pre-launch planning and looks at organizational strategies, marketing tactics, regulatory considerations, pre-launch analytics techniques and case studies of success. For more information visit www.pharmapre-launchroi.com/index.asp.

Dulles, Va., research company Vovici has released Vovici Feedback Intelligence, a solution for survey analytics designed to marry business intelligence with feedback data. The program is designed to allow business users to analyze, visualize and distribute feedback analyses without having to export feedback data into analytic tools or having to wait for custom reports to be written by scarce technical resources. For more information visit www.vovici.com.

San Mateo, Calif., research company Epocrates Inc. has expanded its market research panel to include physicians and pharmacists in the U.K., Germany, France, Italy and Spain. The expansion is designed to allow researchers working with Epocrates to meet their U.S. and European panel fulfillment needs simultaneously. For more information visit www.epocrates.com.

North Star Marketing, a Lancaster, Pa., public relations agency, has developed NowVue, a technology designed to give companies real-time analytics of how visitors are using their Web sites. NowVue is designed to provide a focus group-style platform to test new Web sites, site features, products and statistical data to support the findings. For more information visit www.northstar-m.com.

Waltham, Mass., research company Invoke Solutions has debuted Engage Analytics, an interactive, real-time, Web-based dashboard and data portal that is designed to house all of Invoke clients' project and program data. Invoke plans to use Engage Analytics in all research endeavors going forward. For more information visit www.invoke.com.

JuxtConsult, a New Delhi, India, research company, has created an online panel of 115,000+ members designed to represent 86 percent of the total urban Indian population (currently 337 million people). In addition to collecting the geographic, demographic and psychographic details of its panelists, JuxtConsult is gathering information on housing, family composition, shopping, vehicle ownership, mobile ownership, health, traditional media usage and brand preferences. JuxtConsult has adopted a Web site called get-counted.net to build its online panel. For more information visit www.juxtconsult.com.

San Francisco research company Peanut Labs has made its sampling service Sample3.0 available to clients wanting U.K.-based survey participants. Sample3.0 is designed to give marketers a profiled and targeted sample of social network users through its integration with 81 networking sites. Users of these sites are encouraged to take part in surveys and must complete a profile questionnaire. Peanut Labs uses this information to match surveys to potential respondents, who then receive invitations through their social network. For more information visit www.peanutlabs.com.

Redlands, Calif., geographic mapping software company ESRI's ArcGIS software has been supported by Microsoft's SQL Server 2008. The SQL Server 2008 integration is designed to provide users with tools to consume, use and extend location-based analysis for computing and Web collaboration. For more information visit www.esri.com/sqlserver2008.

B2B International, a Manchester, U.K., research company, has launched INSTEP (Independent Student Experience Program), a tool designed to enable schools and educational establishments in the U.K. to conduct market research as a way to understand the needs of their students. INSTEP has been designed to complement the National Student Survey, an initiative funded by the U.K. government and run by Ipsos MORI, and to measure actual levels of satisfaction and pinpoint areas likely to impact student satisfaction. For more information visit www.b2binternational.com.

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contempt in connection with the alleged violation of an earlier telemarketing fraud judgment by one of them, Robin Larry Murphy, who was barred in 1997 from making material misrepresentations of fact while telemarketing. The settlement means the FTC will collect the proceeds of a $100,000 bond that Murphy was required to file as part of the earlier judgment.

All 27 market research interviewers working the night of December 8, 2008, at the **Surveytalk** call center in Auckland, New Zealand, walked off the job, angry at their Australian bosses' continued refusal to improve pay rates, health and safety and allow workers to take annual leave as other New Zealand research call center employees do.

The strike is the first of the Calling for Change campaign. The Unite Union represents around 400 research workers who are negotiating with research bosses to win union contracts with improved conditions, rates of pay and healthy workplaces at nine of New Zealand's major market research companies.

Unite said the outsourced center was "an attempt by Surveytalk to avoid paying the good union-won rates of pay and safe working conditions that must be observed in Australia."

Wilkerson & Associates, a Louisville, Ky., research company, has changed its name to **Thoroughbred Research Group**. Thoroughbred Opinion Research, the field service division of Wilkerson & Associates, will also go by the name Thoroughbred Research Group. Corporate headquarters for all Thoroughbred divisions will remain in Louisville, Ky., with regional offices in Chicago and Orem, Utah.

Acquisitions/transactions

WebVisible Inc., an Irvine, Calif., advertising company has acquired **Adapt Technologies Inc.** (Adapt SEM), a Pasadena, Calif., research company. For current Adapt SEM customers, there will be no interruption in services. The Adapt SEM Web site will remain active.

Paris research company **Ipsos** has acquired 60 percent of the **Strategic Puls** group, a research company in the Balkans.

The Knowland Group, a Salisbury, Md., hospitality marketing and sales company, has purchased Denver research and software company **E-Z Reader**. The Knowland Group hopes the acquisition will help provide to its clients a comprehensive database of potential new customers to the Denver hotel industry.

New York research company **TNS** has acquired the remaining 37 percent of the shares in the capital of **TNS InterScience**, a Sao Paolo, Brazil, custom market research business, to develop networks in faster growing markets and sectors. TNS has held a majority interest in TNS InterScience since 2005.

Alliances/strategic partnerships

Marketing Management Analytics (MMA), a Fairfield, Conn., research company, has joined Chicago researcher **Synovate**. Formerly part of Synovate's sister company Aegis Media, during the last two years MMA has collaborated with Synovate on client projects, with MMA providing independent validation for Synovate clients' marketing activities.

National Research Corporation, Lincoln, Neb., has merged with **My InnerView Inc.**, a Wausau, Wis., research company, focused on senior care.

Nielsen Online, a division of New York researcher The Nielsen Company, has been selected to provide currency online research data for Switzerland through a partnership with the industry committee **Net-Metrix**. The service will see Nielsen's NetView panel combined with the Net-Metrix tracking panel, bringing together around 4,000 panelists.

Overland Park, Kan., research company **eVergance** and Oslo, Norway, research software company **Confirmit** have partnered to deliver enterprise feedback management solutions.

1105 Media Education Group, an education research publication division of 1105 Media, Irvine Calif., has partnered with **Project Tomorrow,** an Irvine, Calif., education nonprofit group, to develop education technology products. The main focus will be to expand the reach and scope of the annual Speak Up survey, which collects and reports on the views of more than 1.2 million K-12 students, teachers, administrators and parents, representing 14,000+ schools in 50 states.

Vovici, a Dulles, Va., research software company, and **Walker Information**, an Indianapolis research company, have partnered to combine Walker Information's database of employee loyalty information with Vovici's enterprise feedback management solution. The collaboration is intended to deploy employee loyalty surveys and compare results against the employee loyalty benchmark database.

Association/organization news

ESOMAR has named its 2009-2010 council. Gunilla Broadbent of GB Global Positioning has been elected as the new ESOMAR president, and Sue Nosworthy of TNS will serve as vice president. The 2009-2010 ESOMAR Council will also include John Marinopoulos, representing Australia; Paulo Pinheiro de Andrade, representing Brazil; Laurent Florès, representing France; Dieter Korczak, representing Germany; Jasal Shah, representing India; Daniela Ostidich, representing Italy; Tatiana V. Barakshina, representing Russia; and Mike Cooke, representing the U.K. Frits Spangenberg will remain in an ex-officio capacity as past president for the next two-year term.

Awards/rankings

The Market Research Council, New York, has elected **Kevin Clancy**, author, business consultant and professor of marketing at Boston University, and **Harold M. Spielman**, chairman emeritus and founder of McCollum/

Spielman Worldwide, to the Marketing Research Hall of Fame. The annual Hall of Fame Award recognizes outstanding members of the market research profession.

Roseanne Luth of Luth Research, San Diego, has been named most admired CEO in the private sector category by the *San Diego Business Journal* in conjunction with Vistage International, a San Diego business administration development company.

RFL Communications Inc., a Skokie, Ill., research information company, has selected Madison, N.J.-based Wyeth Pharmaceuticals' customer and market insights department as the winner of the PMR2 Executive of the Year award. The honor is bestowed each year by RFL's *Pharma Market Research Report*. RFL's *Research Conference Report* has selected **Trixie Cartwright**, director of research-on-research at TNS Global, a London research company, as the winner of the Market Research Presentation of the Year award. Additionally, RFL's *Research Business Report* has named San Francisco research company **MarketTools Inc.**'s survey management and analysis software SurveyScore the winner of the High Impact MR Project award. Finally, *Research Business Report* has selected San Francisco research company Socratic Technologies Inc.'s president **Bill MacElroy** as the winner of the Market Research Executive of the Year award.

Chicago research company **Synovate** has won the David Winton award for innovation in methodology from the Market Research Society, London. Sponsored by TNS, the award was presented to Synovate for its paper, "A new measure of brand attitudinal equity based on the Zipf Distribution."

Vision Critical Inc., a Vancouver, B.C., research company, has been ranked 54th on Deloitte's 2008 Technology Fast 500, a ranking of the 500 fastest-growing technology companies in North America. Rankings are based on percentage of fiscal year revenue growth over five years, from 2003-2007. Vision Critical grew 5,291 percent during this period.

Research magazine of London held the Research Awards 2008 in December 2008, and **Nunwood**, a Leeds, U.K., research company was named best agency. The Best New Agency award went to **Truth**, a London research company. **The Central Office of Information**, London, was named Best Place to Work, while **Conquest Research**, London, won the Research Breakthrough award for its Metaphorix online research tool.

New accounts/projects

MDLinx Inc., a Washington, D.C., research company has adopted East Islip, N.Y., research company **Mktg Inc.**'s Crop Duster de-duplication technology as its flagship de-duplication software.

The National Geographic Channel (NGC), Washington, D.C., has become the first network to adopt New York researcher **The Nielsen Company**'s DigitalPlus service, part of Nielsen's set-top box analytics business. Under the agreement with Nielsen, NGC will gain access to granular data from 330,000+ set-top boxes within Charter Communications' Los Angeles cable system. This set-top box information is designed to complement traditional people-meter ratings data from Nielsen's samples and to allow National Geographic Channel to develop new analyses in commercial and commercial pod ratings; in commercial creative retention; and in standard versus high-definition measurement.

Separately, The Nielsen Company has launched its Bases new product sales forecasting business in the Middle East. The service will be offered out of the firm's existing office in Sharjah, the United Arab Emirates.

Microsoft Corp., Redmond, Wash., and Redlands, Calif., geographic mapping software company **ESRI** have undertaken a Homeland Security project to help protect citizens, prevent and solve crimes and enable counter-terrorism through software. The collaboration is designed to combine capabilities from both organizations in geospatial and collaborative technologies and to result in intelligence for state and local data fusion centers and emergency operations centers. FusionX Appliance, a baseline IT architecture for fusion centers, is expected to serve as a foundational project to provide users geospatial intelligence capabilities by combining ESRI's ArcGIS Server Advanced Enterprise with Microsoft Office SharePoint Server 2007.

Separately, **The Registrar of Voters** (ROV) of Alameda County, Calif., has adopted ESRI's geographic information system (GIS) software to simplify precinct analysis and polling station siting processes. The ROV used ESRI's GIS during the November 2008 elections.

Finally, two Brazilian electric distribution companies, **AES Sul** and **AES Eletropaulo**, signed an enterprise license agreement (ELA) with ESRI's Brazilian distributor Imagem Geosistemas E Comércio Ltda. The ELA will provide deployments of current ESRI GIS software for the desktop and server as well as support, training and maintenance.

Ipsos Mori Scotland, a division of Paris research company Ipsos, has been awarded the contract to carry out the fourth-annual "Well? What do you think?" survey. The survey, run by the Scottish government, examines public attitudes to mental health-related issues. Around 1,200 people across Scotland will be surveyed in a series of door-to-door interviews.

Nielsen Online, a division of New York researcher The Nielsen Company, has switched to using online population estimates produced by the **Joint Industry Committee for Internet Measurement Systems** (Jicims) in place of its own global Internet trends survey. Nielsen will replace its own GNETT survey to provide audience numbers that are consistent with the U.K. online estimates provided by Jicims.

Additionally, **Hallmark Channel**, Studio City, Calif., has adopted The

NielsenConnections Brand Target Audience products, which are designed to document the impact of Hallmark Channel's programming against advertiser's marketing targets and to help media buyers and planners better target their client's spending. Hallmark Channel is also the first Nielsen client to include magazines and retail in its cross-platform measurement.

BBM Canada has commercialized and gone 100 percent electronic in Montreal with New York research company **Arbitron Inc.**'s portable people meter (PPM) radio ratings service. The Montreal market launch is the first phase of BBM Canada's rollout plan, which will launch combined PPM radio and television panels in Toronto; Vancouver, B.C.; Calgary, A.B.; and Edmonton, A.B., in Fall 2009.

Separately, Arbitron has made plans to expand the introduction of cell-phone-only sampling to 151 diary markets in Spring 2009 and to all markets (except Puerto Rico) by Fall 2009. The new implementation schedule accelerates the company's previously announced plan to introduce cell-phone-only sampling to 50 diary markets in Spring 2009 and to a total of 125 diary markets in Fall 2009. Arbitron plans to use an address-based sample frame as the foundation of its cell-phone-only sample, while maintaining the random-digit-dial sample frame for landline households.

New York research company **TNS** has been awarded a contract from the **European Commission** and the **European Parliament** to cover all the qualitative studies for the organizations, known as Eurobarometer studies. The Eurobarometer qualitative studies will be managed within TNS' political and social sector by TNS Opinion and will involve group discussions and in-depth interviews with the general public and specific target groups in 34 countries and territories, including all 27 European Union member states.

Diversity Media Services Ltd., Toronto, and **Ipsos Reid**, the Vancouver, B.C., division of Paris research company Ipsos, joined efforts to launch Canada's first national multicultural research study to explore the buying behaviors and cultural intricacies of Canada's 13 largest ethno-cultural groups in six census metropolitan areas, where nearly half the population of Canada resides.

Circle Research, London, has chosen **Globalpark UK Ltd.**, a Cologne, Germany, research company, as its online-feedback software provider. Globalpark's enterprise feedback suite will become Circle Research's technological basis for its online research service business.

Minneapolis-based **General Mills** has adopted San Francisco research company **MarketTools**' TrueSample as its technology solution for ensuring the validity of online survey respondents.

Additionally, **Research Now**, London, has joined the TrueSample Partner Program, a global network of sample providers that have their panels validated by MarketTools TrueSample technology.

MTV Networks, a division of New York media conglomerate Viacom, has selected **Quantcast**, a San Francisco research company, for its online solutions to quantify MTV audiences.

The Economic and Social Research Council, Swindon, U.K., has made available £1.1m to establish ESRC Survey Resources Network, a service intended to uphold five main objectives: fostering and promoting the development of new methods within survey methodology; providing high-quality online resources that can be used for training and research within the area of survey research; contributing to building capacity in high-quality survey practice; coordinating all of the above activities at a national and international level; and scoping out potential efficiencies in the processes of data collection (by questionnaires and other means), sample maintenance, data coding, cleaning and documentation.

New companies/new divisions/relocations/expansions

CGC Consulting Services, a Cumming, Ga., research company, has expanded its market research division by adding two focus group rooms at its headquarters.

New York research firm **Data Development Worldwide** has opened new offices in Chicago and Indianapolis. Matt Valle will serve as vice president, office director in Chicago, and Valory Myers will serve as vice president, office director in Indianapolis.

The Research Partnership, London, has opened a new regional headquarters in Toronto. Katrina Johnson, associate director, runs the office, which has been established to provide clients in North America support for Therapy KnowlEdge, the company's online medical charting service, support to clients in North America.

Livonia, Mich., research firm **Market Strategies International** has opened an office in London, located at 15 Old Bailey.

Vision Critical Inc., a Vancouver, B.C., research firm, has opened a Chicago office with Matt Kleinschmit and LeAnn Helmrich heading up the operation, both as senior vice presidents. Vision Critical has also launched a new branch in Sydney, Australia.

Research company earnings/financial news

Confirmit, Oslo, Norway, has reported revenue up 51 percent in the first nine months of 2008, but financial details were not published as the survey software maker was taken into private hands. Alexander Vik, a Norwegian investor and member of the company's board, acquired the 62 percent of Confirmit not already held by his investment firm Sebastian Holdings for $42.6 million. The deal was completed at the end of September 2008, and Vik is now chairman of the company.

Names of Note

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promoted **Jennifer Reid** to chief panel officer.

Trevor Godman has been named research director, technology, media and telecoms, of Rochester, N.Y., research company *Harris Interactive*.

Omaha, Neb., research company *infoGroup* has hired **Thomas J. McAlister** as CIO.

Finbarr O'Neill has been promoted to president of Westlake Village, Calif., researcher *J.D. Power and Associates*.

PDi, a Saddle River, N.J., research company, has appointed **Nancy Lurker** as its CEO and as a member of its board of directors.

The NPD Group, a Port Washington, N.Y., research company, has appointed **David Pritchard** to lead its European toy sales tracking business.

Innerscope Research, Boston, has hired **Geoffrey Gill** as CFO and vice president, strategy; **Ravi Kothuri** as vice president, technology and research and development; and **Donna DeAngelis** as vice president and general manager.

Virtual Surveys, Manchester, U.K., has hired **Andy Buckley** to lead an online communities specialist team.

Peter Wills has stepped down as managing director of *Snap Surveys*, London, and will be replaced by his fellow cofounder **Steve Jenkins**. Wills will remain with the company as chairman.

Interpret LLC, a Los Angeles research company, has appointed **Elaine B. Coleman** as vice president, strategy and analysis.

International Communications Research, Media, Pa., has named **Jeff Nevitt** senior vice president, consumer packaged goods.

Eric G. John has joined *SciMedica Group Marketing Research and Consulting*, Conshohocken, Pa., as senior vice president.

ESRI, a Redlands, Calif., geographic mapping software company, has hired **Lawrie Jordan** as director, imagery enterprise solutions.

WorkPlace Media, a Cleveland research company, has hired **Robert De Jong** as vice president, business development.

Graham Lane has joined *Burke, Inc.*, Cincinnati, as a senior account executive, client services.

CGC Consulting Services, a Cumming, Ga., research company has hired **Glenn Weissman** as vice president, marketing.

InsightExpress, a Stamford, Conn., research company, has named **Rory O'Flynn** vice president, research, digital media measurement. Separately, InsightExpress has expanded its digital media measurement analytics team by hiring **Shannon Gessner** as market research manager and **Katie Frey** as market research analyst.

Edward (Ted) G. Donnelly III has been promoted to managing director of *Baltimore Research*, Baltimore.

ESOMAR has named its 2009-2010 council. **Gunilla Broadbent** of GB Global Positioning has been elected as the new ESOMAR president, and **Sue Nosworthy** of TNS will serve as vice president. The 2009-2010 ESOMAR Council will also include **John Marinopoulos**, representing Australia; **Paulo Pinheiro de Andrade**, representing Brazil; **Laurent Florès**, representing France; **Dieter Korczak**, representing Germany; **Jasal Shah**, representing India; **Daniela Ostidich**, representing Italy; **Tatiana V. Barakshina**, representing Russia; and **Mike Cooke**, representing the U.K. **Frits Spangenberg** will remain in an ex-officio capacity as past president for the next two-year term.

2009

Marketing Research

Software Directory

>>>

The 2009 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 68
The software cross-reference tables begin on page 84

ActiveGroup
Norcross, GA
Ph. 770-449-5539 or 800-793-3126
sales@activegroup.net
www.activegroup.net
Software:
ActiveGroup

Advanced Data Research, Inc.
Rochester Hills, MI
Ph. 248-299-5300 ext. 210
soave@adrsoft.com
www.adrsoft.com
Software:
Abase

Alleviation Software, Inc.
(Survey Charter)
Fort Worth, TX
Ph. 817-860-8589
info@surveycharter.com
www.surveycharter.com
Software:
Survey Charter

AmSoft Systems US LLC
Los Altos, CA
Ph. 650-948-2030
chitra.madhok@amsoft.net
www.amsoft.net
Software:
PULSE

The Analytical Group, Inc.
Scottsdale, AZ
Ph. 480-483-2700
Info@AnalyticalGroup.com
www.analyticalgroup.com
Jack Pollack, President
Branch office:
Glenview, IL
Ph. 847-901-4480
Info@AnalyticalGroup.com
www.analyticalgroup.com
Jerry Madansky, CEO
Software:
Arthur
M-Link
Q-Leap
QueryWeb
Sp-Link
WinCross
WinLink
WinQuery

TAG provides total support for the researcher. WinQuery®, computer-aided software featuring easy questionnaire set-up, sample management, quota control, interviewer productivity and disposition reports. WinCross®, tabulation software featuring 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 with online real-time reports via the Internet.
(See advertisement on p. 69)

Anyware Mobile Solutions
Tulsa, OK
Ph. 800-401-8740 or 918-280-8693
sales@goanyware.com
www.goanyware.com
Software:
Reform

Apian Software
Seattle, WA
Ph. 800-237-4565
sales@apian.com
www.apian.com
Software:
DecisionPad
SurveyPro

ARCS®
Fort Washington, PA
Ph. 800-336-7674 or 215-653-7100
tantoniewicz@m-s-g.com
www.arcsivr.com
Tim Antoniewicz, AVP - ARCS Bus. Dev.
Software:
ARCS®

ARCS® Systems provide a unique set of fully-integrated capabilities - simultaneous inbound/outbound IVR options, panel management/scheduling, concurrent Web/IVR survey capabilities and multiple project support. Based on Microsoft Windows, COM+ (Component Services) and SQL Server, the ARCS system is efficient, flexible and highly scalable. All data stored in SQL databases.
(See advertisement on pp. 41, 73)

ARL-Products
Rotterdam
Netherlands
Ph. 31-10-282-74-44
retail@arl-consulting.com
www.arl-products.com
Software:
Mystery Shopping Software

ASDE Survey Sampler
Gatineau, QC
Canada
Ph. 819-770-3651 or 888-323-3651
info@surveysampler.com
www.surveysampler.com
Randa Bell
Software:
ASDE Survey Sampler - Canada
ASDE Survey Sampler - USA

ASDE provides-methodologically sound and statistically-accurate general population phone samples for the U.S. and Canada. Use Survey Sampler software in house for unlimited sampling. Contact ASDE for list cleaning, list matching, cell phone, targeted, radius and ethnic sampling, plus IVR hosting. ASDE is the only North American firm ISO 9001-2000 certified for sampling and related services for survey professionals.
(See advertisement on p. 68)

ASKIA - Software for Surveys
New York, NY
Ph. 718-399-0039
newyork@askia.com
www.askia.com
John Rousay
Software:
askiaanalyse
askiadesign
askiaface
askiafacemobile
askiasurf
askiavista
askiavoice
askiaweb

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.
(See advertisement on this page)

ATP Canada Software and Services Ltd.
Newmarket, ON
Canada
Ph. 905-868-8742
sales@atpcan.com
www.rosetta-intl.com
Dave Homer, President
Software:
Rosetta Studio

ATP is a leading provider of tabulations and other data processing services to the market research industry. Since 1989, our unwavering commitment to excellence and exceptional customer service has resulted in tremendous growth. Rosetta Studio is our software solution that helps automate the reporting of your tabular data into ready-to-go PowerPoint or Excel presentations. Use our simple interface to create charts and customize your tables or use our powerful tagging system to populate your existing presentation. Create a professional presentation in minutes!
(See advertisement on pp. 53, 71)

Austin NameStormers
Lago Vista, TX
Ph. 512-267-1814 or 512-917-6923
mike@namestormers.com
www.namestormers.com
Michael L. Carr, Director
Software:
Headliner®
NamePro®

AutoData Systems
Minneapolis, MN
Ph. 952-938-4710 or 800-662-2192
sales@autodata.com
www.autodata.com
Joanne Norris
Software:
ExpertScan
NetE-nable
Scannable Office

BayaSoft LLC
Leominster, MA
Ph. 800-698-BAYA or 978-537-5510
quotes@bayasoft.com
www.bayasoft.com
Software:
BayaSoft Custom Development
BayaSoft RTD - Real Time Data
BayaSoft RTR - Real Time Reporting

Beach Tech Corporation
Minneapolis, MN
Ph. 612-924-9193 ext. 521 or 800-323-0434
doug.sellner@beachtech.com
www.beachtech.com
Doug Sellner
Software:
Eform

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

Business Forecast Systems
Belmont, MA
Ph. 617-484-5050
info@forecastpro.com
www.forecastpro.com
Software:
Forecast Pro
Forecast Pro Unlimited
Forecast Pro XE

Caliper Corporation
Newton, MA
Ph. 617-527-4700
info@caliper.com
www.caliper.com
Software:
Maptitude
Maptitude for Redistricting
Maptitude for the Web
TransCAD

Cardiff Software
A Division of Autonomy
Vista, CA
Ph. 760-936-4500
info@verity.com
www.cardiff.com
Software:
Teleform

CfMC Research Software and Service Bureau
San Francisco, CA
Ph. 866-LUV-CfMC or 866-588-2362
sales@cfmc.com
www.cfmc.com
Gene Filipi, Dir. of Business Dev.
Software:
MENTOR
SURVENT
webCATI
WebSurvent

Cint - New York Office
New York, NY
Ph. 646-400-2234
Kevin.umeh@cint.com
www.cint.com/cpx
Kevin Umeh, CEO
Software:
Automated Tracker
Panel Manager
Sample Access

Cint is an international software company that produces innovative, Web-based, online market research solutions. Our easy-to-use, totally-transparent products automate time-consuming and expensive survey processes, saving the market research industry both time and money. Cint's main product, Cint Panel Exchange, is an online marketplace where panel owners can easily set up and manage online survey communities and where sample users can log in and gain direct access to panel sample across the globe.

Cint - Seattle Office
Seattle, WA
Ph. 206-354-7008
Keith.leeman@cint.com
www.cint.com/cpx
Keith Leeman, Sr. Acct. Ex, US West/Canada
Software:
Automated Tracker
Panel Manager
Sample Access

Cint is an international software company that produces innovative, Web-based, online market research solutions. Our easy-to-use, totally-transparent products automate time-consuming and expensive survey processes, saving the market research industry both time and money. Cint's main product, Cint Panel Exchange, is an online marketplace where panel owners can easily set up and manage online survey communities and where sample users can log in and gain direct access to panel sample across the globe.

Cint USA
Atlanta, GA
Ph. 404-946-1821
oscar.carlsson@cint.com
www.cint.com/cpx
Richard Avery, Sr. Acct. Executive US East
Software:
Automated Tracker
Panel Manager
Sample Access

Cint is an international software company that produces innovative, Web-based, online market research solutions. Our easy-to-use, totally-transparent products automate time-consuming and expensive survey processes, saving the market research industry both time and money. Cint's main product, Cint Panel Exchange, is an online marketplace where panel owners can easily set up and manage online survey communities and where sample users can log in and gain direct access to panel sample across the globe.

Claritas Inc.
San Diego, CA
Ph. 866-737-7429
info@claritas.com
www.claritas.com
Software:
Claritas BusinessPoint
ConsumerPoint
iMARK Online
iXPRESS
PrimeLocation

Clipstream™ Survey
Div. of Destiny Media Technologies
Vancouver, BC
Canada
Ph. 604-609-7736 or 800-909-3173
quirks@clipstream.com
www.surveyclip.com
John Gammack, Vice President
Software:
Clipstream™ Video MR

Cobalt Sky Limited
New York, NY
Ph. 646-375-5141
info@cobalt-sky.com
www.cobalt-sky.com
Lou Smith, General Manager
Software:
Vector
Winyaps

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

Confirmit
(Formerly Future Information Research Management Inc.)
New York, NY
Ph. 212-660-1800
info@confirmit.com
www.confirmit.com
Yaron Brenman
Software:
Confirmit

Confirmit is the world's leading provider of software for market research and enterprise feedback management with the industry's largest and most experienced R&D staff. In 2007, Confirmit and Pulse Train joined forces to deliver the most complete, feature-rich and robust set of Market Research applications available today. Confirmit targets Global 5000 companies and MR agencies with a wide range of software products for feedback/data collection, panel management, data processing, analysis and reporting.
(See advertisement on quirks.com)

CONVERSOFT (Axiom Software)
Paris
France
Ph. 33-1-53-26-45-45
info@conversoft.com
www.conversoft.com
Software:
CONVERSO CAPI
CONVERSO CASI
CONVERSO CATI
CONVERSO CAWI
CONVERSO Enterprise
CONVERSO Pocket/Mobile

Creative Research Systems
Petaluma, CA
Ph. 707-765-1001
info@surveysystem.com
www.surveysystem.com
Bill Eaton, Vice President
Software:
The Survey System - CATI
The Survey System - PDA
The Survey System - Web
The Survey System (Version 9.5)

Creoso Corporation
Phoenix, AZ
Ph. 602-438-2100 or 866-665-0533
info1@digivey.com
www.digivey.com
Elisabeth Scherer, V.P. Marketing
Software:
Digivey Survey Suite™

Crusader Services
Los Angeles, CA
Ph. 323-871-2145
sallyhpr@earthlink.net
www.crusader-services.com
Sally Hooper, Owner
Software:
Interque

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

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

Database Sciences, Inc.
Mountclair, NJ
Ph. 201-262-8500
info@dbsciences.com
www.databasesciences.com
Software:
surveyNgine.com

DATAN, Inc. - Data Analysis Systems & Services
Washington, NJ
Ph. 908-689-4060
mcstentzphd@datan.com
www.datan.com
Michael C. Stentz, Ph.D., President
Software:
FASTAB Ad Hoc Tabulation
MERLIN Tabulation System
MERLINPlus (plus menus)
MPE Data Entry & Editing

Dataxiom Software, Inc.
Los Angeles, CA
Ph. 213-383-9973
sales@dataxiom.com
www.dataxiom.com
Software:
NCSS
PASS
Power & Precision
SOLAS
StatMost
XPro

decipher
survey programming + reporting

Decipher
Fresno, CA
Ph. 800-923-5523
info@decipherinc.com
www.decipherinc.com
Kristin Luck
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.

Decision Analyst, Inc.

Decision Analyst, Inc.
Arlington, TX
Ph. 817-640-6166 or 800-262-5974
jthomas@decisionanalyst.com
www.decisionanalyst.com
Jerry W. Thomas, President/CEO
Software:
STATS™ 2.0

Newly updated, Decision Analyst STATS™ 2.0 is a free software package for IBM-compatible PCs. It can handle large datasets with thousands of records. Advanced statistical functions include cross-tabulation, correlation, factor analysis, multiple regressions and cluster analysis. While still retaining its basic functionality, the program generates random numbers, calculates sample sizes and computes the mean, standard deviation, standard error, significance testing and chi-square analysis.
(See advertisement on p. 7)

Decision Support Sciences
Naperville, IL
Ph. 630-428-1847
info@decisionsupportsciences.com
www.decisionsupportsciences.com
Software:
MiningSolv
PositionSolve
PrefSolv
SatisSolve
SegmentSolv

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

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

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

Empathica Inc.
Mississauga, ON
Canada
Ph. 888-633-1633 or 905-542-9001
info@empathica.com
www.empathica.com
Steve Prodger, V.P., Strategic Accounts
Software:
Empathica Customer Experience Mgmt. System

ESRI
Vienna, VA
Ph. 800-447-9778
info@esri.com
www.esri.com
Software:
Address Coder
ArcGIS 9.3 Business Analyst

E-Tabs
Automated Charting
www.e-tabs.com

E-Tabs
Batavia, IL
Ph. 888-823-8227 or 630-879-8227
info@e-tabs.com
www.e-tabs.com
Benjamin Rietti
Software:
E-Tabs AutoGraph
E-Tabs Enterprise
E-Tabs Lite Reader
E-Tabs Professional Reader
E-Tabs Writer

E-Tabs are the world experts in report automation, endorsed by top market research agencies and end users globally. Our software range enables you to deliver greater efficiencies, time and cost savings by automating the reporting process, preparing charts and presentations directly from your existing data sources. E-Tabs have provided software and services to the market research industry since 1993, with offices in Chicago and London, and have in excess of 15,000 users worldwide. Keep your edge and automate today with E-Tabs' Award winning software.
(See advertisement on p. 75)

Fleetwood Group, Inc.
Holland, MI
Ph. 616-396-1142 or 800-257-6390
sales@fleetwoodgroup.com
www.replysystems.com
Software:
Reply

FocusVision
WORLDWIDE

FocusVision Worldwide
Stamford, CT
Ph. 203-961-1715
info@focusvision.com
www.focusvision.com
Carol McNerney
Software:
FocusVision

FocusVision is the leading global provider of online video transmission, analysis and archive solutions for the qualitative market research industry. With solutions for all venues, including the largest global network of focus group facilities, FocusVision delivers the highest audio and video quality and reliability for the most advanced research organizations. FocusVision solutions increase key stakeholder participation, avoid the hassles and costs of travel and accelerate the review, analysis and reporting process to make smarter decisions, faster.
(See advertisement on p. 35)

Forall Systems, Inc.
Chicago, IL
Ph. 800-337-4203
info@forallsystems.com
www.forallsystems.com
Karen Jeffrey, Ph.D., President
Software:
ForSurveys

Framework Data Services Inc.
Naples, FL
Ph. 239-435-3281
qpsmr@frameworkUSA.com
www.frameworkUSA.com/QPSMR
Liza Wong
Software:
QPSMR CATI
QPSMR Input
QPSMR Insight
QPSMR Reflect
QPSMR Solo

Framework is an independent data analysis company with over 20 years of experience. Areas of expertise include data processing, Web surveys, mail surveys, data capture, statistical analysis and modeling, and charts and graphics. We are an authorized supplier of QPSMR software, the leading research and analysis software, with facilities from questionnaire design through data entry onto analysis and beyond.
(See advertisement on p. 18)

GENESYS Sampling Systems
Fort Washington, PA
Ph. 800-336-7674 or 215-653-7100
info@m-s-g.com
www.genesys-sampling.com
Alan Lambert, Asst. Vice President
Software:
GENESYS Sampling Systems

GENESYS allows you to design and generate sample on your PC or via the new virtualGENESYS Web-based system available 24/7. With geographic capabilities down to census tract/BG level and exchange-level information on over 50 demographic characteristics, you can create incidence and coverage estimates to improve budgeting and design of samples. Zipcode, demographic, congressional district, census tract and PRIZM clusters modules available.
(See advertisement on pp. 41, 73)

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

Globalpark US
New York, NY
Ph. 1-888-299-9422
info@globalpark.us
www.globalpark.com
Daniel Coates
Software:
EFS Employee
EFS Leadership
EFS-Panel
EFS-Survey

Gravic, Inc. - Remark Products Group
Malvern, PA
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
Provo, UT
Ph. 801-356-3512
jneubert@hamiltonlocke.com
www.hamiltonlocke.com
Software:
MAIA Market Attitude & Intent Analysis

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

Hostedware
Irvine, CA
Ph. 949-585-1500 ext. 1507 or 800-211-6967
lisa.price@hostedware.com
www.hostedware.com
Software:
Hosted Poll
Hosted Survey
Hosted Test
Hosted Survey Lite

IBM
Ottawa, ON
Canada
Ph. 613-738-3512 or 888-921-8360
info@ibm.com
www.databeacon.com
Software:
Databeacon

Information Tools Ltd.
Highland Park, IL
Ph. 847-748-8196
mail@infotools.com
www.infotool.com
Software:
ESPRI
HARMONI

Inquisite Inc.
Austin, TX
Ph. 512-225-6800 or 800-581-7354 (sales)
sales@inquisite.com
www.inquisite.com
Wynn Hartley, Marketing Director
Software:
Inquisite Survey

Insight Marketing Systems Pty. Ltd.
St. Kilda, VIC
Australia
Ph. 61-3-9534-5699
info@researchreporter.com
www.researchreporter.com
Daryl Maloney McCall
Software:
Research Reporter

Intellisurvey, Inc.
Ladera Ranch, CA
Ph. 949-298-4400
info@intellisurvey.com
www.intellisurvey.com
Jonathan Ephraim, Managing Director
Software:
Intellisurvey

Interview Technology
Amsterdam
Netherlands
Ph. 31-20-620-15-89
itsales@interviewtechnology.com
www.interviewtechnology.com
Andre Smit
Software:
IT CATI/CAPI/Web

Itracks
Saskatoon, SK
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
Austin, TX
Ph. 512-590-8300
info@kinesissurvey.com
www.kinesissurvey.com
Software:
Kinesis Survey

Kinesis Survey Technologies(TM) 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 p. 77)

KMR Group
New York, NY
Ph. 212-303-6700
helpdesk@us.kantarmedia.com
www.kmrsoftware.com
Andrea Decordova
Software:
Compose
KMRQuest
XPert and ViewGraphic Suite™

Lidlow Worldwide
Saskatoon, SK
Canada
Ph. 866-934-7175
sales@lidlow.com
www.lidlow.com
Jeff Jebson, Director of Sales & Marketing
Software:
Delve!Online™
Progression™

Marketing and Research Data Consultants
MRDC Ltd.
Kent
United Kingdom
Ph. 44-1732-883712
info@mrdcsoftware.com
www.mrdcsoftware.com
Phil Hearn
Software:
MRDCL
OnTraq
Report Direct

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

MARKETING | SYSTEMS | GROUP
Leadership Through Innovation

Marketing Systems Group
Fort Washington, PA
Ph. 800-336-7674 or 215-653-7100
info@m-s-g.com
www.m-s-g.com
Dale W. Kulp, President/CEO
Software:
PRO-T-S
GENESYS
ARCS IVR

GENESYS Sampling Systems: See GENESYS Sampling Systems listing. PRO-T-S® Telephony Systems: See PRO-T-S® Telephony Systems listing. ARCS®: See ARCS® Systems listing. Survey Database Management Systems: A Web-based storage/browser system for market research tabulations. Point-and-click to tables, spreadsheets or maps for further analysis.
(See advertisement on pp. 41, 73)

MarketingStat
4104 Oberwil
Switzerland
Ph. 41-61-401-60-55
info@marketingstat.com
www.marketingstat.com
Software:
MM4XL 7.0

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

MarketTools, Inc.
San Francisco, CA
Ph. 415-957-2200 or 866-499-3750
info@markettools.com
www.markettools.com
Software:
CustomerSat
MarketTools.com
Zoomerang

MDSS, Inc.
Marketing Decision Support Systems, Inc.
Indianapolis, IN
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.
New York, NY
Ph. 212-209-3979
boyar@mediaanalyzer.com
www.mediaanalyzer.com
Charles Boyar, Vice President
Software:
AttentionTracking

Memphis International
London
United Kingdom
Ph. 44-870-446-0640
post@memphissoftware.com
www.memphissoftware.com
Software:
Launch Explorer
Media Explorer
Survey Explorer Version 6
Survey Explorer Web Server
Survey Transformer
Survey Viewer

Microtab, Inc.
Alpharetta, GA
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.
Minneapolis, MN
Ph. 612-399-3837 or 866-876-8242
ask@modernsurvey.com
www.modernsurvey.com
Software:
Modern360 Feedback

Moskowitz Jacobs Inc.
White Plains, NY
Ph. 914-421-7456
bkrieger@mji-designlab.com
www.mji-designlab.com
Software:
IdeaMap®.Net
StyleMap®.Net

MSInteractive - Perception Analyzer
Portland, OR
Ph. 503-225-8418 or 800-769-0906
analyzer@perceptionanalyzer.com
www.perceptionanalyzer.com
David Paull, Vice President
Software:
Perception Analyzer

Multivariate Software, Inc.
Encino, CA
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(See advertisement on p. 79)

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(See advertisement on pp. 41, 73)

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Software:
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(See advertisement on pp. 53, 71)

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(See advertisement on this page)

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(See advertisement on p. 15)

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(See advertisement on p. 81)

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(See advertisement on this page)

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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
Address Coder ESRI, p. 74							Unltd.											
Analytics Module Toluna USA, p. 82							1,000	1,000	●	●	●		●	●	●			
ARGUS Perceptual Mapper SPRING SYSTEMS, p. 80	●										●							
askiaanalyse ASKIA - Software for Surveys, p. 70	●					GUI	Unltd	Unltd	●	●	●		●		●			
askiavista ASKIA - Software for Surveys, p. 70						Both	Unltd	Unltd	●	●	●		●		●		Either	
Asteroid Roy Morgan International Ltd., p. 79	●					Both	Unltd	Unltd	●	●		●	●		●	●		
CART Salford Systems, p. 79	●		●	●		Both	8,192		●	●	●						Buy	$$
Claritas BusinessPoint Claritas Inc., p. 72					●	GUI			●	●	●	●					Either	$$$$
Confirmit Confirmit, p. 72	●				●	GUI			●	●	●	●			●			
ConsumerPoint Claritas Inc., p. 72	●					GUI			●	●	●	●					Lease	$$$$
CPM System Sawtooth Software, Inc., p. 79						GUI			●	●	●			●				
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 80					●	GUI			●	●	●	●	●					
Databeacon IBM, p. 76					●	GUI												
Dub InterViewer NEBU b.v., p. 78	●			●	●	GUI	Unltd	Unltd	●	●	●	●	●				Lease	
East 4.0 Cytel Inc., p. 74																	Buy	$$
Eform Beach Tech Corporation, p. 70	●				●	Both	Unltd	Unltd	●	●	●	●		●	●	●	Either	
eListen Scantron, p. 80	●				●	GUI	Unltd	Unltd	●	●	●							
EQS Structural Equations Modeling Multivariate Software, Inc., p. 78	●		●	●		GUI			●	●	●		●	●	●	●	Either	$$
ESPRI Information Tools Ltd., p. 76	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Buy	$$
E-Tabs Lite Reader E-Tabs, p. 74	●					GUI												
E-Tabs Writer E-Tabs, p. 74	●		●	●		GUI											Lease	$$$
EzMedia Plan New Age Media Systems, Inc., p. 78					●	GUI	Unltd	Unltd	●	●	●	●					Lease	$$$$
FASTAB Ad Hoc Tabulation DATAN, Inc., p. 74	●					GUI	32,000	Unltd	●	●	●						Lease	$
Flo - Stat Senecio Software, Inc., p. 80		●							●	●	●	●	●	●	●	●		
Forecast Pro Business Forecast Systems, p. 70	●					GUI	10	1	●		●						Buy	$
Forecast Pro Unltd Business Forecast Systems, p. 70	●					Both	Unltd	Unltd	●	●	●		●		●		Buy	$$$$

$ = $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
Forecast Pro XE Business Forecast Systems, p. 70	●					GUI	100	1	●	●	●		●		●		Buy	$$$
GeoSight Sammamish Data Systems, Inc., p. 79	●					GUI	Unltd	Unltd	●	●	●						Buy	$
Goldminer® Statistical Innovations Inc., p. 80	●					GUI				●	●		●	●		●	Buy	$$
HARMONI Information Tools Ltd., p. 76	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Buy	$$$
Hosted Survey Hostedware, p. 76					●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	
IdeaMap®.Net Moskowitz Jacobs Inc., p. 78					●	GUI					●	●						
ImagEntry Viking Software Solutions, p. 82	●		●	●		GUI	32,000	32,000									Buy	$$
iMARK Online Claritas Inc., p. 72					●	GUI			●		●	●					Lease	$$$$
Impact! Analysis Pattern Discovery, Inc., p. 78																	Lease	
Internet Survey Machine Marketing Masters, p. 76	●	●	●	●	●	GUI	32,000	Unltd									Buy	$$$
Interview & Analysis Program Comstat Research Corporation, p. 72																		
Ioxphere Xorbix Technologies, Inc., p. 83	●	●			●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$
iXPRESS Claritas Inc., p. 72	●					GUI			●		●	●					Lease	$$$
Kereba.com SyClick, p. 82					●	GUI			●		●	●					Lease	$$$
KMRQuest KMR Group, p. 76	●												●				Lease	
Latent Gold® Statistical Innovations Inc., p. 80	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Buy	$$
Latent Gold® Choice Statistical Innovations Inc., p. 80	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Lease	$$$
LogXact Cytel Inc., p. 74																	Buy	$
MarketSight® MarketSight LLC, p. 77	●				●	GUI	10,000	Unltd.	●	●	●	●	●	●	●	●	Either	$$
MARS Salford Systems, p. 79	●		●	●			8,192		●	●	●						Buy	$$$$
Mentor CfMC Research Software and Service Bureau, p. 72	●		●	●		Syntax	Unltd	Unltd	●	●	●	●	●		●	●	Lease	
MERLIN Tabulation System DATAN, Inc., p. 74	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$$
MERLINPlus (plus menus) DATAN, Inc., p. 74	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$
Microtab Version 7 - Professional Edition Microtab, Inc., p. 77	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$$
Microtab Version 7 - Standard Edition Microtab, Inc., p. 77	●					GUI	Unltd	Unltd	●			●					Buy	$$
Microtab Version 7 SPSS Add-on Module Microtab, Inc., p. 77	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$

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
MktSIM SPRING SYSTEMS, p. 80	●										●							
MM4XL 7.0 MarketingStat, p. 77	●					GUI	200	Unltd.	●	●	●	●	●	●	●	●	Buy	$$
Modern360 Feedback Modern Survey, Inc., p. 77																		
MRDCL Marketing and Research Data Consultants, p. 76	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$$$
mTAB Research Analysis System PAI-Productive Access, Inc., p. 78	●				●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	
NCSS Dataxiom Software, Inc., p. 74	●					GUI	250	Var	●	●	●		●	●	●	●	Buy	$
NCSS NCSS, p. 78	●					GUI	1,000	Unltd	●		●		●	●	●	●	Buy	$
NIPO DIANA NIPO Software, p. 78	●				●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Lease	$$$
OnTraq Marketing and Research Data Consultants, p. 76	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$
Panel Portal whole solution Toluna USA, p. 82					●	GUI	1,000	1,000	●	●	●		●		●	●		$$$$$
PASS Dataxiom Software, Inc., p. 74	●					GUI											Buy	P
PEER Forecaster Delphus, Inc., p. 74	●					GUI			●					●	●		Either	$
PEER Planner for Windows Delphus, Inc., p. 74	●					GUI			●	●	●	●	●	●	●	●	Either	$$$$
Postal Carrier Route Polygons Sammamish Data Systems, Inc., p. 79	●						Unltd	Unltd	●	●	●						Buy	$
Power & Precision Dataxiom Software, Inc., p. 74	●					GUI											Buy	$$
PrimeLocation Claritas Inc., p. 72	●					GUI			●	●	●	●					Lease	$$$$
P-STAT P-STAT, Inc., p. 78	●		●	●		Both	250,000	Unltd	●	●	●	●	●	●	●		Buy	$
QDA Data Analysis Software Tragon, p. 82	●					GUI	100				●			●			Buy	$$$$
QPSMR CATI Framework Data Services Inc., p. 76	●					Both	30,000	30,000	●	●			●	●	●	●	Lease	$$$$
QPSMR CATI QPSMR Limited, p. 78	●					Both	30,000	30,000	●	●		●	●	●	●	●	Lease	$$$$
QPSMR Insight Framework Data Services Inc., p. 76	●					Both	30,000	30,000	●	●			●	●	●	●	Lease	$$
QPSMR Insight QPSMR Limited, p. 78	●					Both	30,000	30,000	●	●		●	●	●	●	●	Lease	$$
QPSMR Reflect Framework Data Services Inc., p. 76	●					Both	30,000	30,000	●	●		●	●	●	●	●		
QPSMR Reflect QPSMR Limited, p. 78	●					Both	30,000	30,000	●	●		●	●	●	●	●		
QPSMR Solo Framework Data Services Inc., p. 76	●					Both	30,000	30,000	●	●		●	●	●	●	●	Buy	$$
QPSMR Solo QPSMR Limited, p. 78	●					Both	30,000	30,000	●	●		●	●	●	●		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
QTAB Jan Werner Data Processing, p. 83	●			●		Syntax	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$$
QuestionPro QuestionPro.com, p. 79					●	GUI	Unltd	Unltd	●			●	●		●		Either	$$
QWriterII for Windows Your Perceptions, Inc., p. 83	●					GUI	2,000	200			●						Lease	$
RandomForests Salford Systems, p. 79	●		●			Both	8,192		●	●	●						Buy	
Raosoft EZReport Raosoft, Inc., p. 79	●					Both	Unltd	Unltd	●	●	●		●	●	●	●	Buy	$
Raosoft SurveyWin Raosoft, Inc., p. 79	●					GUI	Unltd	Unltd	●	●			●	●	●	●	Buy	$
Rosetta Studio Rosetta Studio International, p. 79	●					GUI		Unltd			●						Either	$$$$
Sensus Web Sawtooth Technologies, Inc., p. 80	●					Both	Unltd	Unltd	●			●					Buy	
Si-CHAID® Statistical Innovations Inc., p. 80	●					GUI	Unltd	Unltd		●	●		●				Buy	$$
SmartForecasts® Smart Software, Inc., p. 80	●					GUI	Unltd		●	●	●	●	●	●	●	●	Either	$$$$
Snap Professional Snap Surveys, Ltd., p. 80	●					GUI	Unltd	Unltd	●	●	●	●	●		●	●	Buy	
Snap Scanning Snap Surveys, Ltd., p. 80	●					GUI	Unltd	Unltd	●	●		●	●		●	●	Buy	
SOLAS Dataxiom Software, Inc., p. 74	●					GUI												
STAT XP Web VOXCO (Groupe Voxco Inc.), p. 83	●					Both	10,000	Unltd	●	●	●	●	●		●	●	Buy	$$$$
Stata StataCorp LP, p. 80	●	●	●	●		Both							●	●	●		Either	$$$
STATISTICA StatSoft, Inc., p. 80	●				●	Both	Var	Var	●	●	●		●	●	●	●	Buy	
StatMost Dataxiom Software, Inc., p. 74	●					GUI	250	Var	●		●		●	●	●	●	Buy	$
StatPac Survey Software StatPac, Inc., p. 80	●					Syntax	2,000	Unltd	●	●	●	●	●	●	●	●	Buy	$$
STATS™2.0 Decision Analyst, Inc., p. 74	●					GUI				●			●		●	●		$
StatXact Cytel Inc., p. 74																	Buy	$$
StatXact Procs for SAS Users Cytel Inc., p. 74																	Buy	$$
StyleMap®.Net Moskowitz Jacobs Inc., p. 78					●	GUI					●	●						
Survey Explorer Version 6 Memphis International, p. 77	●					GUI	Unltd	Unltd	●	●			●					
Survey Said Enterprise Edition Marketing Masters, p. 76	●				●	GUI											Buy	
Survey Select Expert SurveyConnect, Inc., p. 82	●					GUI	Unltd	Unltd			●	●					Buy	$$
SurveyPro Apian Software, p. 68	●					GUI	3,000	3,000	●	●	●	●	●				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
TabRight RDA Group, p. 79									●	●	●							
TestKit Hexworx Computer Services P/L, p. 76	●		●	●	●	Both	Unltd	Unltd	●	●	●	●			●	●	Buy	$
The Survey Cybernetic Solutions - The Survey Software, p. 72	●					GUI	1,000	32,000	●	●	●		●	●	●	●	Buy	$
The Survey System - CATI Creative Research Systems, p. 72	●					GUI	32,000	1,000										$$$
The Survey System - PDA Creative Research Systems, p. 72	●						32,000	na									Buy	$
The Survey System - Web Creative Research Systems, p. 72	●					GUI	32,000	1,000	●	●		●	●	●	●	●		$$
The Survey System (Version 9.5) Creative Research Systems, p. 72	●					GUI	32,000	5,000	●	●		●	●	●	●	●		$$
TPL Tables QQQ Software, Inc., p. 78	●		●	●		Both	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$
TreeNet Salford Systems, p. 79	●		●	●		Both	8,192		●	●	●						Buy	$$$$
Trial Map SPRING SYSTEMS, p. 80	●										●							
Turbo Spring-Stat SPRING SYSTEMS, p. 80	●										●		●	●	●	●		
Uncle Professional The Uncle Group, Inc., p. 82	●					Both	65,534	9,999	●	●	●		●		●		Buy	$$$$
Uncle Reports The Uncle Group, Inc., p. 82	●					GUI	9,999		●	●								$
Uncle Standard The Uncle Group, Inc., p. 82	●					Both	65,534	9,999	●	●	●		●		●		Buy	$$$$
U-Tab™ Weeks Computing Services, p. 83	●					GUI	Unltd	Unltd	●	●	●	●	●	●	●		Buy	$
VDE Viking Software Solutions, p. 82	●		●	●		GUI	32,000	32,000									Either	$$
VDE+Images Viking Software Solutions, p. 82	●		●	●		GUI	32,000	32,000									Buy	$$
Vector Cobalt Sky Limited, p. 72					●	GUI	Unltd	Unltd	●	●	●	●				●	Lease	$$$$
WinCati Sawtooth Technologies, Inc., p. 80	●					Both	Unltd	Unltd	●			●					Buy	
WinCATI Mixed Mode Sawtooth Technologies, Inc., p. 80	●					Both	Unltd	Unltd	●			●					Buy	
WinCross The Analytical Group, Inc., p. 68	●					Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$$
XPro Dataxiom Software, Inc., p. 74	●					GUI	250	Var	●	●	●		●	●	●	●	Buy	$
Zip + 2 Polygons Sammamish Data Systems, Inc., p. 79	●						Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$
Zip + 4 Centroids Sammamish Data Systems, Inc., p. 79	●						Unltd.	Unltd.	●	●	●						Buy	
Zip Code Polygons Sammamish Data Systems, Inc., p. 79	●						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	Keypad Entry	Tabulation	Statistics	Visual Tools	Buy or Lease	Price Range
ACA System Sawtooth Software, Inc., p. 79	●				●	GUI	●	●	●	●	●			●	●	●	●		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 76	●	●	●	●	●	Both	●			●					●			Either	
AskAnywhere Senecio Software, Inc., p. 80	●	●	●	●	●	GUI	●	●		●	●				●			Lease	$$
Blaise Westat, p. 83	●					GUI	●	●	●	●								Buy	
CBC System Sawtooth Software, Inc., p. 79	●				●	GUI	●	●	●	●	●	●		●	●	●	●		
Checkbox Mobile Survey Prezza Technologies, Inc., p. 78	●					GUI				●				●					
Confirmit Confirmit, p. 72	●				●	GUI	●	●	●	●	●	●	●	●	●	●	●		
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 80					●	GUI				●	●	●	●	●	●	●	●		
Cutom Panel Building Itracks, p. 76					●	GUI			●	●				●	●	●	●		
CVA System Sawtooth Software, Inc., p. 79	●					GUI	●	●	●			●		●	●	●	●		
Decipher Decipher, p. 74					●	GUI	●	●	●	●	●				●	●	●	Lease	
Dub InterViewer NEBU b.v., p. 78	●			●	●	GUI	●	●	●	●					●	●		Lease	
Eform Beach Tech Corporation, p. 70	●				●	Both			●	●	●		●	●	●	●	●	Either	
EFS-Panel Globalpark US, p. 76					●	Both				●		●	●		●	●		Lease	$$$$
EFS-Survey Globalpark US, p. 76					●	GUI	●			●		●						Lease	$$$$
Hosted Survey Hostedware, p. 76					●	Both	●			●	●	●		●	●	●	●	Either	
IT CATI/CAPI/Web Interview Technology, p. 76	●				●	Both	●		●	●					●			Buy	$$$$
Itracks Online CATI Itracks, p. 76					●	Both			●	●				●	●	●	●		
Itracks Online Surveys Itracks, p. 76					●	Both				●				●	●	●	●		
Kereba.com SyClick, p. 82					●	GUI			●	●	●				●	●	●	Lease	$$$
MaxDiff/Web Sawtooth Software, Inc., p. 79	●				●	GUI	●	●	●	●	●	●							$$$
MM4XL 7.0 MarketingStat, p. 77	●					GUI									●	●	●	Buy	$$
Mobile Surveys Itracks, p. 76					●	Both				●	●			●	●	●	●		
Morae TechSmith Corporation, p. 82	●					GUI								●		●	●	Buy	
NIPO Fieldwork System NIPO Software, p. 78	●					Both	●	●	●	●	●	●		●	●	●	●	Lease	$$
Online Focus Groups Itracks, p. 76					●	GUI				●				●	●	●	●		

$ = $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	Keypad Entry	Tabulation	Statistics	Visual Tools	Buy or Lease	Price Range
Pulse DNA Software Suite Pulse Group, p. 78	●			●	●	Both	●	●	●	●	●	●	●	●	●	●	●	Either	
QPSMR CATI Framework Data Services Inc., p. 76	●					Both	●	●	●		●	●		●	●	●		Lease	$$$$
QPSMR CATI QPSMR Limited, p. 78	●					Both	●	●	●		●	●		●	●	●		Lease	$$$$
QPSMR Insight Framework Data Services Inc., p. 76	●					Both	●								●	●	●	Lease	$$
QPSMR Insight QPSMR Limited, p. 78	●					Both	●				●	●		●	●	●		Lease	$$
Qualmetrix Itracks, p. 76					●	GUI				●					●		●		
Raosoft EZSurvey Raosoft, Inc., p. 79	●				●	Both	●	●	●	●	●	●		●				Buy	$
Raosoft SurveyWin Raosoft, Inc., p. 79	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$
Results for Research 6.0 RONIN Corporation, p. 79	●				●	Both	●	●	●	●								Buy	
Snap Professional Snap Surveys, Ltd., p. 80	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	
Software G3 Rogator AG, p. 79	●		●	●		GUI			●	●								Either	
Software G4 Rogator AG, p. 79	●		●	●		GUI			●	●								Either	
SPSS Dimensions SPSS Inc., p. 80	●				●	Both	●	●	●	●		●	●	●	●	●	●	Either	
SPSS Dimensions mrPaper / mrScan SPSS Inc., p. 80	●					GUI						●	●					Either	$$$$$
SSI Web Sawtooth Software, Inc., p. 79	●				●	Both	●	●	●	●	●	●		●	●	●	●		
StatPac Survey Software StatPac, Inc., p. 80	●					Syntax			●	●	●	●		●	●	●	●	Buy	$$
Survey Genie William Steinberg Consultants, Inc., p. 80	●					GUI				●	●	●		●	●	●	●	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 80	●					GUI		●		●	●	●		●	●	●	●	Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 76	●				●	GUI			●	●	●	●	●	●				Buy	
Survey Tools For Windows William Steinberg Consultants, Inc., p. 80	●					GUI		●		●	●	●		●	●	●	●	Buy	$$
SurveyPro Apian Software, p. 68	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$$
The Survey Cybernetic Solutions - The Survey Software, p. 72	●					GUI				●	●	●		●	●	●	●	Buy	$
The Survey System (Version 9.5) Creative Research Systems, p. 72	●					GUI	●	●	●	●	●	●	●	●	●	●	●		$$
Virtual Call Center Network Itracks, p. 76					●	GUI			●	●					●	●	●		
Voxco Command Center VOXCO (Groupe Voxco Inc.), p. 83					●	GUI	●	●	●	●		●	●	●	●	●		Either	
WinCATI Mixed Mode Sawtooth Technologies, Inc., p. 80	●					Both			●	●					●	●	●	Buy	

Paper-based/Scan Survey Software	Operating System			Design Tool	Types of Data Collection					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
Confirmit Confirmit, p. 72	●		●	GUI	●	●	●		●	Yes		
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 80			●	GUI		●				Yes		
Eform Beach Tech Corporation, p. 70	●		●	Both		●	●			Yes	Either	
EFS-Panel Globalpark US, p. 76			●	Both	●						Lease	$$$$
EFS-Survey Globalpark US, p. 76			●	GUI	●						Lease	$$$$
ExpertScan AutoData Systems, p. 70	●			GUI		●	●	●	●	Yes	Buy	$$$
FAQSS Optimum Solutions Corp., p. 78	●			GUI	●	●	●	●	●	Yes	Lease	$$$$
FLIPS Scantron, p. 80	●				●	●	●					
Inquisite Survey Inquisite Inc., p. 76	●		●	GUI		●				Yes	Either	$$$$
Pulse DNA Software Suite Pulse Group, p. 78	●	●	●	Both	●			●			Either	
Raosoft SurveyWin Raosoft, Inc., p. 79	●			GUI	●	●				Yes	Buy	$
ReadSoft Documents for Forms ReadSoft, Inc., p. 79	●			GUI	●	●	●	●	●	Add-on	Buy	$$$$
Remark Classic OMR Gravic, Inc. - Remark Products Group, p. 76	●			GUI		●	●	●		Yes	Buy	$
Remark Office OMR Gravic, Inc. - Remark Products Group, p. 76	●			GUI		●	●			Yes	Buy	$$
Scannable Office AutoData Systems, p. 70	●			GUI	●	●	●	●	●	No	Buy	$$$$
SNAP Professional Snap Surveys, Ltd., p. 80	●			GUI	●	●		●	●	Yes	Buy	
SNAP Scanning Snap Surveys, Ltd., p. 80	●			GUI	●	●		●	●	Yes	Buy	
SPSS Dimensions mrPaper / mrScan SPSS Inc., p. 80	●			GUI	●		●	●	●	Add-on	Either	$$$$$
Survey Genie William Steinberg Consultants, Inc., p. 80	●			GUI						Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 80	●			GUI						Yes	Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 76	●		●	GUI	●	●				Yes	Buy	
Survey Select Expert SurveyConnect, Inc., p. 82	●			GUI						Yes	Buy	$$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 80	●			GUI						Yes	Buy	$$
SurveyPro Apian Software, p. 68	●			GUI		●	●			Yes	Buy	$$
TELEform Scantron, p. 80	●				●			●	●			
The Survey System (Version 9.5) Creative Research Systems, p. 72	●			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	Linux	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. 68	●					●	●	●		Both	●	●	●	Yes	Buy	$$$$
ACA System Sawtooth Software, Inc., p. 79	●				●	●	●			GUI	●	●	●	Yes		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 76	●	●	●	●	●	●	●			Both	●	●	●	Yes	Either	
ASDE Survey Sampler - Canada ASDE Survey Sampler, p. 70	●									GUI			●		Lease	$$
ASDE Survey Sampler - USA ASDE Survey Sampler, p. 70	●									GUI			●		Lease	$$
AskAnywhere Senecio Software, Inc., p. 80	●	●	●	●	●	●	●	●		GUI	●	●	●	Yes	Lease	$$
askiaface ASKIA - Software for Surveys, p. 70	●					●				Both	●	●	●		Either	
askiafacemobile ASKIA - Software for Surveys, p. 70	●						●	●		Both	●	●	●		Either	
CBC System Sawtooth Software, Inc., p. 79	●				●	●	●			GUI	●	●	●	Yes		
Checkbox Mobile Survey Prezza Technologies, Inc., p. 78	●						●			GUI						
Cheshire Westat, p. 83																
Confirmit Confirmit, p. 72	●				●	●			●	GUI	●		●	Yes		
CONVERSO CAPI CONVERSOFT (Axiom Software), p. 72	●					●	●	●		Both	●	●	●	Yes	Either	
CONVERSO CASI CONVERSOFT (Axiom Software), p. 72	●					●	●	●		Both	●	●	●		Either	
CONVERSO Pocket/Mobile CONVERSOFT (Axiom Software), p. 72	●						●	●		Both	●	●		Yes	Either	
CVA System Sawtooth Software, Inc., p. 79	●					●	●			GUI	●	●	●	Yes		
Digivey Survey Suite™ Creoso Corporation, p. 72	●					●	●	●		GUI	●	●	●	Yes	Either	$$
Dub InterViewer NEBU b.v., p. 78	●			●	●	●	●	●		GUI	●	●	●	Add-on	Lease	
Eform Beach Tech Corporation, p. 70	●				●	●			●	Both	●	●		Yes	Either	
EFS-Panel Globalpark US, p. 76					●		●			Both					Lease	$$$$
EFS-Survey Globalpark US, p. 76					●		●			GUI					Lease	$$$$
Empathica Customer Experience Mgmt. System Empathica Inc., p. 74					●				●					Yes	Buy	$$$$
Entryware 6 Techneos Systems Inc., p. 82	●				●	●	●	●		Both	●	●	●	Add-on	Either	$$
ForSurveys Forall Systems, Inc., p. 74					●		●			GUI		●		No	Lease	$$
Hosted Survey Hostedware, p. 76					●		●	●		Both	●	●	●	Add-on	Either	
Internet Survey Machine Marketing Masters, p. 76	●	●	●	●	●					GUI			●		Buy	$$$
Interview & Analysis Program Comstat Research Corporation, p. 72																
IT CATI/CAPI/Web Interview Technology, p. 76	●				●					Both				Yes	Buy	$$$$
Kereba.com SyClick, p. 82					●					GUI	●	●	●		Lease	$$$

CAPI/CASI Software	Operating System					Platform				Design Tool	CAPI/CASI Features				Purchasing	
Software Title/ Company/Listing page #	Win	Mac	Linux	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. 79	●				●	●	●			GUI				Yes		$$$
NIPO CAPI System NIPO Software, p. 78	●					●	●	●		Both	●	●	●	Add-on	Lease	$$$$
Panel Portal whole solution Toluna USA, p. 82					●	●	●			GUI	●	●	●	Yes		$$$$$
QPSMR CATI Framework Data Services Inc., p. 76	●					●	●			Both	●	●	●	Yes	Lease	$$$$
QPSMR CATI QPSMR Limited, p. 78	●					●	●			Both	●	●	●	Yes	Lease	$$$$
QPSMR Input Framework Data Services Inc., p. 76	●					●				GUI		●		No		
QPSMR Input QPSMR Limited, p. 78	●					●				GUI		●	●	No		
QPSMR Insight Framework Data Services Inc., p. 76	●					●	●			Both		●	●		Lease	$$
QPSMR Insight QPSMR Limited, p. 78	●					●	●			Both		●	●	Yes	Lease	$$
Raosoft EZSurvey Raosoft, Inc., p. 79	●				●	●	●	●		Both	●	●	●	Yes	Buy	$
Raosoft InterForm Raosoft, Inc., p. 79	●				●	●				GUI	●	●	●	Yes	Buy	
Raosoft SurveyWin Raosoft, Inc., p. 79	●					●		●		GUI		●		Add-on	Buy	$
Reform Anyware Mobile Solutions, p. 68					●		●		●	GUI	●	●		Yes		
Reply Fleetwood Group, Inc., p. 74	●	●				●				GUI	●	●	●	No		
Results for Research 6.0 RONIN Corporation, p. 79	●				●	●	●	●		Both	●	●	●	Yes	Buy	
SmartQ TeleSage, Inc., p. 82	●								●	GUI	●			Add-on	Buy	$$$$
SNAP Professional Snap Surveys, Ltd., p. 80	●					●	●	●		GUI	●	●	●	Yes	Buy	
SODA Techneos Systems Inc., p. 82	●				●		●	●		Both				Add-on	Either	
SPSS Dimensions Interview Player SPSS Inc., p. 80	●					●	●			Both	●	●	●	Add-on	Either	$$
SSI Web Sawtooth Software, Inc., p. 79	●				●	●	●			Both	●	●	●	Yes		
SURVENT CfMC Research Software and Service Bureau, p. 72	●		●	●	●	●				Syntax	●			Yes	Lease	
Survey Genie William Steinberg Consultants, Inc., p. 80	●					●				GUI				Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 80	●					●				GUI				Yes	Buy	$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 80	●					●				GUI				Yes	Buy	$$
SurveyPro Apian Software, p. 68	●					●		●		GUI		●		Yes	Buy	$$
The Survey System - CATI Creative Research Systems, p. 72	●					●				GUI	●	●	●	Yes		$$$
The Survey System - PDA Creative Research Systems, p. 72	●						●						●	No	Buy	$
The Survey System (Version 9.5) Creative Research Systems, p. 72	●					●	●	●		GUI	●	●	●	Yes		$$
TPL Tables QQQ Software, Inc., p. 78	●		●	●						Both			●		Buy	$$
WinQuery The Analytical Group, Inc., p. 68	●					●		●		Both	●	●	●	Yes	Buy	$

CATI Software	Operating System					Design Tool	CAPI/CASI Features			Purchasing	
Software Title/ Company/Listing page #	Win	Mac	Linux	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. 70	●					Both	●	●	Yes		
Confirmit Confirmit, p. 72	●				●	GUI	●	●	Yes		
CONVERSO CATI CONVERSOFT (Axiom Software), p. 72	●					Both	●	●	Yes	Either	
Dub InterViewer NEBU b.v., p. 78	●			●	●	GUI	●	●	Yes	Lease	
Eform Beach Tech Corporation, p. 70	●				●	Both			Yes	Either	
Interview & Analysis Program Comstat Research Corporation, p. 72											
Ioxphere Xorbix Technologies, Inc., p. 83	●	●			●	GUI	●	●	Yes	Either	$$
IT CATI/CAPI/Web Interview Technology, p. 76	●				●	Both			Yes	Buy	$$$$
Itracks Online CATI Itracks, p. 76					●	Both	●	●	Yes		
Kereba.com SyClick, p. 82					●	GUI	●		Yes	Lease	$$$
NIPO Fieldwork System for CATI NIPO Software, p. 78	●					Both	●	●	Add-on	Lease	$$$$
Panel Portal - only for scripting Toluna USA, p. 82					●	GUI	●		Add-on		$$$$$
Panel Portal whole solution Toluna USA, p. 82					●	GUI	●		Yes		$$$$$
Pulse DNA Software Suite Pulse Group, p. 78	●			●	●	Both				Either	
QPSMR CATI` QPSMR Limited, p. 78	●					Both	●	●	Yes	Lease	$$$$
Raosoft EZSurvey Raosoft, Inc., p. 79	●				●	Both	●		Add-on	Buy	$
Raosoft InterForm Raosoft, Inc., p. 79	●				●	GUI	●		Add-on	Buy	

CATI Software	Operating System					Design Tool	CAPI/CASI Features			Purchasing	
Software Title/ Company/Listing page #	Win	Mac	Linux	Linux	Web	Graphic User Interface or Script	Central Management	Predictive Dialing	Tabulation Analysis Tools	Buy or Lease	Price Range
Raosoft SurveyWin Raosoft, Inc., p. 79	●					GUI	●		Add-on	Buy	$
Results for Research 6.0 RONIN Corporation, p. 79	●				●	Both	●	●	Yes	Buy	
SNAP Professional Snap Surveys, Ltd., p. 80	●					GUI			Yes	Buy	
SPSS Dimensions mrInterview CATI SPSS Inc., p. 80	●					Both	●	●	Add-on	Either	$$$$$
StatPac Survey Software StatPac, Inc., p. 80	●					Syntax			Yes	Buy	$$
SURVENT CfMC Research Software and Service Bureau, p. 72	●		●	●	●	Syntax	●	●	Yes	Lease	
Survey Said Enterprise Edition Marketing Masters, p. 76	●				●	GUI			Yes	Buy	
The Survey Cybernetic Solutions - The Survey Software, p. 72	●					GUI	●		Yes	Buy	$
The Survey System - CATI Creative Research Systems, p. 72	●					GUI	●		Yes		$$$
The Survey System - PDA Creative Research Systems, p. 72	●								No	Buy	$
The Survey System (Version 9.5) Creative Research Systems, p. 72	●					GUI	●		Yes		$$
SurveyPro Apian Software, p. 68	●					GUI			Yes	Buy	$$
TelAthena TelAthena Systems LLC, p. 82											
Virtual Call Center Network Itracks, p. 76					●	GUI	●	●	Yes		
webCATI CfMC Research Software and Service Bureau, p. 72	●			●	●	Both	●	●	Yes		
WinCATI Sawtooth Technologies, Inc., p. 80	●					Both	●	●	Yes	Buy	
WinQuery The Analytical Group, Inc., p. 68	●					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. 79	●				●	GUI	Web	●	●	Yes	●		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 76	●	●	●	●	●	Both	Web	●	●	Yes	●	Either	
ARCS® ARCS®, p. 68	●					GUI	Web	●	●	No	●	Either	$$$$
AskAnywhere Senecio Software, Inc., p. 80	●	●	●	●	●	GUI	Both	●	●	Yes	●	Lease	$$
askiaweb ASKIA - Software for Surveys, p. 70	●					GUI	Both	●	●	Yes	●		
AttentionTracking MediaAnalyzer Software & Research, Inc., p. 77	●				●	GUI	Web	●	●	Yes	●	Lease	
Automated Tracker Cint - New York Office, p. 72	●					GUI	E-mail	●	●	No	●	Buy	$
Automated Tracker Cint - Seattle Office, p. 72	●					GUI	E-mail	●	●	No	●	Buy	$
Automated Tracker Cint USA, p. 72	●					GUI	E-mail	●	●	No	●	Buy	$
BayaSoft Custom Development BayaSoft LLC, p. 70					●		Both	●	●	Yes		Lease	
BayaSoft RTD - Real Time Data BayaSoft LLC, p. 70					●		Both	●	●	Yes	●	Lease	
BayaSoft RTR - Real Time Reporting BayaSoft LLC, p. 70					●		Both	●	●	Yes	●	Lease	
Bulletin Board Focus Groups Itracks, p. 76					●	GUI	Web	●	●	Yes	●		
CBC System Sawtooth Software, Inc., p. 79	●				●	GUI	Web	●	●	Yes	●		
Checkbox Mobile Survey Prezza Technologies, Inc., p. 78	●					GUI	Web			Yes			
Checkbox Survey Prezza Technologies, Inc., p. 78	●					GUI	Both	●	●	Yes	●	Either	$$
Clipstream™ Video MR Clipstream™ Survey, p. 72	●		●	●	●	GUI	Web			No		Either	$$
Confirmit Confirmit, p. 72	●				●	GUI	Both	●	●	Yes	●		
CONVERSO CAWI CONVERSOFT (Axiom Software), p. 72	●					Both	Web	●	●	Yes	●	Either	
Converso Enterprise CONVERSOFT (Axiom Software), p. 72					●		Web						
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 80					●	GUI	Web	●	●	Yes	●		
Cutom Panel Building Itracks, p. 76					●	GUI	Web	●	●	Yes	●		
CVA System Sawtooth Software, Inc., p. 79	●					GUI		●					
Decipher Decipher, p. 74					●	GUI	Web	●	●	Yes	●	Lease	
Digivey Survey Suite™ Creoso Corporation, p. 72	●					GUI	Both	●	●	Yes	●	Either	$$
Dub InterViewer NEBU b.v., p. 78	●			●	●	GUI	Web	●	●	Add-on		Lease	

Web Interviewing Software Solutions

Software Title/ Company/Listing page #	Operating System					Design Tool	Web Interviewing Features					Purchasing	
	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. 70	●				●	Both		●	●	Yes		Either	
EFS-Panel Globalpark US, p. 76					●	Both	Web	●	●	Yes	●	Lease	$$$$
EFS-Survey Globalpark US, p. 76					●	GUI	Web	●	●	Yes	●	Lease	$$$$
Empathica Customer Experience Mgmt. System Empathica Inc., p. 74					●		Web	●	●	Yes	●	Buy	$$$$
eQ TeleSage, Inc., p. 82	●					GUI	Both	●	●	Add-on	●	Lease	$$$
eTelescipt Touchstar Software, p. 82					●	GUI	Web	●			●	Buy	
Eval Builder Your Perceptions, Inc., p. 83	●				●	Both	Both	●		Yes	●	Lease	
FindLocation.com Xionetic Technologies, Inc., p. 83					●	GUI	Web					Buy	
Fusion Vision Critical, p. 82					●	GUI	Web	●		Yes	●	Lease	
Hosted Survey Hostedware, p. 76					●	Both	Both	●	●	Add-on	●	Either	
Hosted Survey Lite Hostedware, p. 76					●		Web						
IdeaMap®.Net Moskowitz Jacobs Inc., p. 78					●	GUI	Web	●	●	Yes	●		
Inquisite Survey Inquisite Inc., p. 76	●				●	GUI	Web	●	●	Yes	●	Either	$$$$
Intellisurvey Intellisurvey, Inc., p. 76					●	Both	Web	●	●	Yes	●		
Internet Research Manager Domestic Data, p. 74	●					GUI	Both	●	●	No	●	Lease	$$$$
Internet Survey Machine Marketing Masters, p. 76	●	●	●	●	●	GUI	Web	●		Yes	●	Buy	$$$
Interview & Analysis Program Comstat Research Corporation, p. 72													
Ioxphere Xorbix Technologies, Inc., p. 83	●	●			●	GUI	Both	●	●	Yes	●	Either	$$
IT CATI/CAPI/Web Interview Technology, p. 76	●				●	Both				Yes		Buy	$$$$
Itracks Online Surveys Itracks, p. 76					●	Both	Web	●	●	Yes	●		
IVIS Resource Systems Group, Inc., p. 79						GUI	Both	●	●		●	Either	
Kereba.com SyClick, p. 82					●	GUI	Both	●	●	Yes	●	Lease	$$$
Kinesis Survey Kinesis Survey Technologies, LLC, p. 76				●	●	GUI	Web	●	●	Yes	●	Lease	$$$
MarketTools.com MarketTools, Inc., p. 77					●	GUI	Web				●	Either	
MaxDiff/Web Sawtooth Software, Inc., p. 79	●				●	GUI	Web	●	●	Yes	●		$$$
Mobile Surveys Itracks, p. 76					●	Both	Both	●	●	Yes	●		

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

Web Interviewing Software Solutions

Software Title/ Company/Listing page #	Operating System					Design Tool	Web Interviewing Features					Purchasing	
	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
NetE-nable AutoData Systems, p. 70	●					GUI	Web			Yes		Lease	$$
NIPO Fieldwork System for Web NIPO Software, p. 78	●					Both	Both	●	●	Add-on	●	Lease	$$
Online Focus Groups Itracks, p. 76					●	GUI	Web	●	●	Yes	●		
Opinio ObjectPlanet AS, p. 78	●	●	●	●	●		Both	●		Yes	●	Either	$
Panel Manager Cint - New York Office, p. 72	●					GUI	E-mail	●		No	●	Buy	$
Panel Manager Cint - Seattle Office, p. 72	●					GUI	E-mail	●		No	●		$
Panel Manager Cint USA, p. 72	●					GUI	E-mail	●		No	●	Buy	$
Panel Portal - only for scripting Toluna USA, p. 82					●	GUI	Both	●	●	Add-on	●		$$$$$
Panel Portal whole solution Toluna USA, p. 82					●	GUI	Both	●	●	Yes	●		$$$$$
Qualboard™ 20/20 Research - Online, p. 82	●	●	●	●	●	GUI	Web	●	●	No	●	Either	$
Qualmeeting™ 20/20 Research - Online, p. 82	●	●	●	●	●	GUI	Web	●		No	●	Lease	$
QueryWeb The Analytical Group, Inc., p. 68	●					Both	Web	●	●	Yes	●	Buy	$$$$
QuestionPro QuestionPro.com, p. 79					●	GUI	Web	●	●	Yes	●	Either	$$
QuestionPro MicroPoll QuestionPro.com, p. 79					●	GUI	Both						
Raosoft EZReport Raosoft, Inc., p. 79	●					Both	Both			Yes	●	Buy	$
Raosoft EZSurvey Raosoft, Inc., p. 79	●				●	Both	Both	●		Add-on	●	Buy	$
Raosoft InterForm Raosoft, Inc., p. 79	●				●	GUI	Web	●		Add-on		Buy	
Remark Web Survey Professional Gravic, Inc. - Remark Products Group, p. 76	●					Both	Both	●				Buy	$$
Remark Web Survey Standard Gravic, Inc. - Remark Products Group, p. 76	●					Both	Both	●		Yes		Buy	$$
Research Reporter Insight Marketing Systems Pty. Ltd., p. 76					●			●	●	Add-on	●	Either	$$$$
Results for Research 6.0 RONIN Corporation, p. 79	●				●	Both	Web	●	●	Yes	●	Buy	
Sample Access Cint - New York Office, p. 72	●					GUI	E-mail	●	●	No	●	Buy	$
Sample Access Cint - Seattle Office, p. 72	●					GUI	E-mail	●	●	No	●	Buy	$
Sample Access Cint USA, p. 72	●					GUI	E-mail	●	●	No	●	Buy	$
Sensus Web Sawtooth Technologies, Inc., p. 80	●					Both	Web	●	●	Yes		Buy	
SNAP Professional Snap Surveys, Ltd., p. 80	●					GUI	Both	●	●	Yes	●	Buy	

Web Interviewing Software Solutions	Operating System					Design Tool	Web Interviewing Features					Purchasing	
Software Title/ Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	Data Collection (Web or E-Mail)	Web Security	Quota Control	Tabulation & Analysis Tools	Real-Time Reports	Buy or Lease	Price Range
Software G3 Rogator AG, p. 79	●		●	●		GUI	Both	●	●	Add-on	●	Either	
Software G4 Rogator AG, p. 79	●		●	●		GUI	Both	●	●	Add-on	●	Either	
Sparq Vision Critical, p. 82					●	GUI	Web	●	●	Yes	●	Lease	
SPSS Dimensions mrInterview SPSS Inc., p. 80	●				●	Both	Web	●	●	Add-on	●	Either	$$$$
SSI Web Sawtooth Software, Inc., p. 79	●				●	Both	Web	●	●	Yes	●		
StatPac Survey Software StatPac, Inc., p. 80	●					Syntax	Both	●		Add-on		Buy	$$
StyleMap®.Net Moskowitz Jacobs Inc., p. 78					●	GUI	Web	●	●	Yes	●		
The Survey Cybernetic Solutions - The Survey Software, p. 72	●					GUI	Both	●		Yes		Buy	$
Survey Console QuestionPro.com, p. 79					●	GUI	Both	●	●	Yes	●	Lease	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 80	●					GUI	Both			Yes		Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 76	●				●	GUI	Web			Yes		Buy	
Survey Select Expert SurveyConnect, Inc., p. 82	●					GUI	Both	●		Yes		Buy	$$
The Survey System - PDA Creative Research Systems, p. 72	●						Both	●	●	Add-on	●	Buy	$
The Survey System - Web Creative Research Systems, p. 72	●					GUI	Both	●	●	Yes	●		$$
The Survey System (Version 9.5) Creative Research Systems, p. 72	●					GUI	Both	●	●	Yes	●		$$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 80	●					GUI	Both			Yes		Buy	$$
surveyNgine.com Database Sciences, Inc., p. 74					●					Yes			
SurveyPro Apian Software, p. 68	●					GUI	Both	●	●	Yes	●	Buy	$$
SurveySquare.com www.SurveySquare.com, p. 82	●					Both	Both	●	●	Yes	●	Lease	$$
SurveyWriter SurveyWriter, p. 82					●	GUI	Both	●	●	Yes	●	Either	$
TestKit Hexworx Computer Services P/L, p. 76	●		●	●	●	Both	Web			Yes		Buy	$
Think Virtual Fieldwork Think Virtual Fieldwork, p. 82					●		Both						
Vovici v4 Enterprise Vovici Corporation, p. 83						GUI	Both	●	●	Yes	●	Either	$$$$$
Vovici v4 Professional Vovici Corporation, p. 83					●	GUI	Both	●		Yes	●	Either	$$$$
WebSurvent CfMC Research Software and Service Bureau, p. 72	●		●	●	●	Both	Web	●	●	Add-on	●	Lease	
Zoomerang MarketTools, Inc., p. 77					●	GUI	Web	●	●		●	Either	

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

Miscellaneous Software

Software Title/ Company/Listing page #	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/ Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tag-line Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling System	Translationt	Web Usability
2D VOG SensoMotoric Instruments, p. 80	●																
3D VOG SensoMotoric Instruments, p. 80	●																
AccessPoint for Market Research Global Bay Mobile Technologies, p. 76	●							●	●								
ActiveGroup ActiveGroup, p. 68											●						
Address Coder ESRI, p. 74		●					●										
ArcGIS 9.3 Business Analyst ESRI, p. 74							●										
ARCS® ARCS®, p. 68												●					
ARGUS Perceptual Mapper SPRING SYSTEMS, p. 80					●	●											
Arthur The Analytical Group, Inc., p. 68			●														
ASDE Survey Sampler - Canada ASDE Survey Sampler, p. 70															●		
ASDE Survey Sampler - USA ASDE Survey Sampler, p. 70															●		
Automated Tracker Cint - New York Office, p. 72								●							●		
Automated Tracker Cint - Seattle Office, p. 72								●							●		
Automated Tracker Cint USA, p. 72								●							●		
Brand Profiler WRC Research Systems, Inc., p. 83					●												
BrandMap WRC Research Systems, Inc., p. 83					●												
BrandTrend WRC Research Systems, Inc., p. 83				●													
Bulletin Board Focus Groups Itracks, p. 76											●						
CART Salford Systems, p. 79					●												
Claritas BusinessPoint Claritas Inc., p. 72		●		●	●	●											
Clipstream™ Video MR Clipstream™ Survey, p. 72											●						●
ConsumerPoint Claritas Inc., p. 72				●	●	●	●										
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 80					●												
Custom Panel Building Itracks, p. 76												●					

Miscellaneous Software

Software Title/ Company/Listing page #	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/ Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tag-line Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling System	Translationt	Web Usability
Data Tailor MDSS, Inc., p. 77		•						•	•			•					
DataFit/DataFit X Oakdale Engineering, p. 78					•												
DDES 7.0 Tragon, p. 82						•											
Decipher Decipher, p. 74												•				•	
DecisionPad Apian Software, p. 68						•											
Delve!Online™ Lidlow Worldwide, p. 76											•						
DialQ TeleSage, Inc., p. 82														•			
Dub Planner NEBU b.v., p. 78								•				•					
East 4.0 Cytel Inc., p. 74						•											
EFS-Panel Globalpark US, p. 76												•					
EFS-Survey Globalpark US, p. 76												•					
ESPRI Information Tools Ltd., p. 76					•	•											
E-Tabs AutoGraph E-Tabs, p. 74				•													
E-Tabs Enterprise E-Tabs, p. 74				•													
E-Tabs Lite Reader E-Tabs, p. 74				•		•											
E-Tabs Professional Reader E-Tabs, p. 74				•													
E-Tabs Writer E-Tabs, p. 74				•													
Eval Builder Your Perceptions, Inc., p. 83	•																
EzMedia Plan New Age Media Systems, Inc., p. 78				•	•												
FindLocation.com Xionetic Technologies, Inc., p. 83						•	•										
Forecast Pro Business Forecast Systems, p. 70						•											
Forecast Pro Unlimited Business Forecast Systems, p. 70						•											
Forecast Pro XE Business Forecast Systems, p. 70						•											
GENESYS Sampling Systems GENESYS Sampling Systems, p. 76															•		

Miscellaneous Software

Software Title/ Company/Listing page #	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/ Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tag-line Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling System	Translationt	Web Usability
Goldminer® Statistical Innovations Inc., p. 80					•												
HARMONI Information Tools Ltd., p. 76					•	•											
Headliner® Austin NameStormers, p. 70										•							
iMARK Online Claritas Inc., p. 72				•	•	•	•	•									
Interque Crusader Services, p. 72											•						
Ioxphere Xorbix Technologies, Inc., p. 83	•																•
IPSS Senecio Software, Inc., p. 80							•										
iViewX SensoMotoric Instruments, p. 80	•																
iXPRESS Claritas Inc., p. 72				•	•	•	•										
Kereba.com SyClick, p. 82	•	•				•	•					•					•
Kinesis Survey Kinesis Survey Technologies, LLC, p. 76												•					
KMRQuest KMR Group, p. 76					•	•	•										
Latent Gold® Statistical Innovations Inc., p. 80					•												
LogXact Cytel Inc., p. 74						•											
MAIA Market Attitude & Intent Analysis Hamilton-Locke, Inc. - Verbatim Analysis, p. 76						•											•
MapInfo Tetrad Computer Applications, Inc., p. 82						•											
MapInfo Professional/MapX Pitney Bowes MapInfo, p. 78							•										
MapPoint Tetrad Computer Applications, Inc., p. 82						•											
Maptitude Caliper Corporation, p. 72							•										
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said it wanted to hold a workshop to find out more about [online behavioral advertising] because there was a chance that they might take it too far. Indeed when the FTC came up with its first draft of proposed principles for self-regulation, it drew a broad definition of what constitutes online behavioral advertising, one which could easily include the collection of information for strictly marketing research purposes, if it might eventually be used to target advertising."

3. Marketing research incentives paid to doctors

Rising up the list of concerns, Fienberg says, is the payment of incentives to doctors for participating in research. The practice, a near-necessity for any firm that wishes to monopolize a doctor's time for the purposes of research, is in danger of being unfairly lumped in with the medical industry's habit of showering doctors with gifts of travel, meals and tickets to sporting and cultural events.

"State legislators who were concerned that pharmaceutical and medical supply firms were purchasing influence with doctors wanted a way to shed some public light on the practice. They started small, in Minnesota and Vermont, with laws that required disclosure of how much was spent in total by these firms on gifts to physicians. Even those efforts, we found, were curtailing market research, because no one was separating research from the practice of gift-giving. So a lot of companies said, 'We don't want to worry about this so we will just stop doing research with doctors in these states.' Then it got amped up because other states started considering legislation that would require public disclosure of how much and to whom these gifts were paid. And at the federal level, some talked about a Web site that would make this information even more public."

At this point, the MRA government affairs office is working to get an exemption for marketing research at the federal level while also trying to educate lawmakers on the differences between gift-giving and incentive-paying.

4. Automated political advocacy calls

They have subsided now that the election is over, but those annoying automated phone calls in which Politician A is raked through the mud by someone representing Politician B are often confused with or lumped together with automated polls, Fienberg says. "We are constantly working at the state and federal level to remind people that an automated poll is not an automated advocacy call. It is collecting information; it is not distributing information."

The office managed to beat back potentially negative bills in a host of states last year, he says, and are continuing to work on those fronts.

5. Push polls

Rembert-Lang and Fienberg will attempt to build of their success last year in Louisiana, where the office was able to get an exemption for marketing research worked into a piece of anti-push-poll legislation. "It regulates deceptive persuasion calls and differentiates them from a poll," Fienberg says. "It was the first time we managed to get in a specific definition of message testing, because that tends to be what comes up as a dispute. The most public ones over the last couple of years have been cases where it's pretty apparent that company was testing a message to see how it would go. They were not trying to influence people's opinion by saying something nasty. It is something that a lot of legislators are sympathetic to, so we are hoping we can replicate that kind of success in other states."

6. Data security and data breach notification

As state and federal lawmakers reexamine privacy issues related to health care and financial information and begin reworking regulations it is quite possible that someone will inadvertently make life more difficult for researchers.

"For example, there are new regulations coming into effect in 2009 in Massachusetts that require very stringent data encryption and all sorts of written information security plans for pretty much any organization that resides in the state or holds data on a state resident," Fienberg says. "So that means that most any company that does any kind of national research will have to comply. We are going to do outreach to the research profession on what they should be planning to do because we are assuming everyone is going to have to comply."

Forty-four states already have requirements for the thresholds at which companies must notify consumers that their data has been breached, how they must do it and how soon, Fienberg says. The trouble is, they are all slightly different and use different definitions. So the government affairs office is working on a standard at the federal level that makes a distinction between sensitive and non-sensitive information and stipulates what must be done if a breach occurs and also protect the research industry in general.

House is on fire

Don't think these issues affect you? Think again. "Some people only become concerned when the house is on fire," Fienberg says. "Well, the last time the house was on fire was when the Do-Not-Call Registry was being written in Congress and we came within about a hair's breadth of having survey research calls included in the national do-not-call effort. Obviously that would have really put the nail in the coffin of telephone survey research. It has destroyed telemarketing. Telemarketing survives now because there is an industry of incoming sales calls where consumers telephone to get product information or make a purchase. I don't think telephone research would survive if it was dependent on having people call in to take surveys."

Near misses like that are why he is especially worried about the investigations into giving gifts to doctors. In the process of trying to do good, lawmakers could inadvertently wipe out a whole line of research.

While Fienberg lauds researchers for their creativity and their ability to adapt to new technologies, he acknowledges that those very attributes are what keeps the government affairs office on its toes. "We have all sorts of people doing interesting research online, for example, but we have to make sure that they are able to do it. I'm not sure how things will progress from a regulatory sense but I am trying to keep track of where the research profession is going and where the law is going. With luck, there won't be another fire that threatens to burn down the house anytime soon." | Q trade talk

By Joseph Rydholm
Quirk's editor

Keeping the regulatory wolves at bay

When it comes to things to worry about in the marketing research realm these days, most of you likely have economic woes on your minds. For those on the client side, important projects are going unfunded and department staffs are being thinned. For vendors, clients aren't returning phone calls and budgets are drying up.

These are all certainly pressing issues, but there are a host of others to keep track of, some of which may affect the industry long after the economy starts improving. Thankfully for us, the Marketing Research Association (MRA) government affairs office is on the watch.

Formerly under the umbrella of the Council for Marketing and Opinion Research, which merged with the MRA in 2008, the office consists of Howard Fienberg, director of government affairs, and LaToya Rembert-Lang, state legislative director. Aiding their efforts are a host of MRA members who sit on the government affairs committee and its various subcommittees.

I spoke with Fienberg following the MRA's release of its top six legislative and regulatory issues facing the research profession in 2009. They are, in rough order of potential to cause problems for the industry:

1. Cell phones

As more households and individuals go cell phone-only, concern is increasing over how this phenomenon will impact research and also how current laws may be changed to protect consumers from receiving unwanted calls on their cell phones.

The existing law, the Telephone Consumer Protection Act of 1991, stipulates that automatic dialing systems can't be used to contact consumers via cell phone without their prior consent. "We are working with the [Federal Communications Commission] and with Congress to get some regulatory relief from a law that is clearly outdated," Fienberg says. "It was never intended to impact anyone beyond the telemarketing industry but somehow it ended up impacting everybody. No one thought a whole lot about it at the time because there weren't as many people using cell phones but of course now nearly everyone has one. There is room for change in the law, it's just that we are in the midst of a very long process to make that change."

Lawmakers are generally sympathetic and are interested in having the law clarified, Fienberg says, but it's unlikely that one of them wants to take credit for working to allow consumers to receive calls that they may find intrusive. "It's hard for a politician to stand up and say, 'We understand that we have kept you from being bothered by all these different telemarketing calls on your cell phone. Well, now we are going to change that so you can get calls on your cell phone from marketing researchers.' No one wants to be that person so it's going to require a bit more nuance."

2. Online privacy

Consumer advocates' fears over online behavioral advertising and tracking, in which non-personally identifiable information like cookies and IP addresses is used to deliver targeted advertising, have resulted in a raft of proposed federal and state regulations which could impact marketing research.

Keeping up with all of the proposed initiatives involves a tremendous amount of work. Part of the problem is that lawmakers often don't have a clear grasp of how aspects of the online realm really work, so they tend to draft measures that are exceptionally broad.

"We were concerned right away when the [Federal Trade Commission]

continued on p. 109