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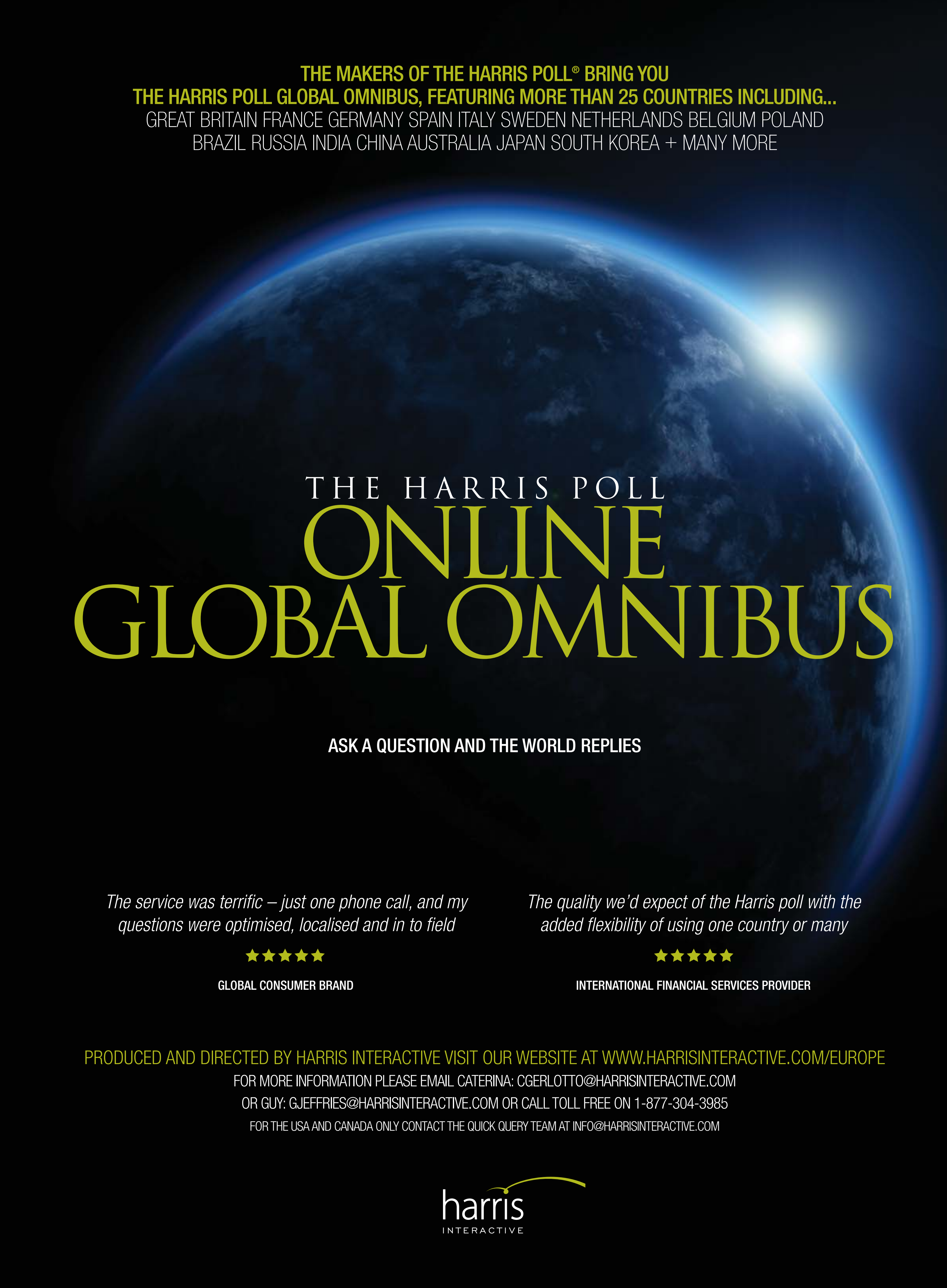
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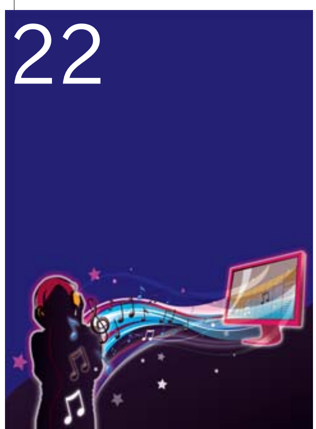

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Chicago	June 22-25
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in case you missed it...

news and notes on marketing and research

Verizon aims to Perk up customer satisfaction

While many Americans view dealing with telecommunications service providers as a necessary evil (we need the technology, they provide it - and most of the time not much else in terms of service), Verizon has set out to change the public's generally-negative perception of service providers by launching Verizon Perks, the company's first customer loyalty program, which gives current customers the ability to purchase gift cards from more than 60 retailers at a reduced rate.

The Verizon Perks program is offered to current residential customers through the company's My Verizon customer service site, and all Verizon customers are able to join provided that they are registered on the site. Verizon hopes the Perks loyalty program will help drive traffic to the site, which already offers 85 functions and services to customers. Verizon does not expect the program to draw in new customers but hopes that it will increase customer satisfaction and retention.

Initially, the Verizon Perks program will let consumers purchase gift cards from retail outlets and restaurants such as Barnes & Noble, Bath & Body Works, Golfsmith, Lands' End, P.F. Chang's, Romano's Macaroni Grill and Outback Steakhouse. The cards, valued at $25, $50 and $100, will be available for purchase at a discount. Future Verizon Perks offers are planned throughout 2010, including the addition of more retailers, free product sample offers and the opportunity to be the first to know about new products, services and content.

Get a five-second brand and engage mile-a-minute Gen Yers

Gen Y is said to have future buying power and purchasing influence the likes of which have never been seen, and along with that a "now" mentality that makes holding their attention especially challenging. These elusive and tech-savvy consumers are distracted both away and toward brands. So how can you make sure that your brand is flypaper and your followers are flies? According to Gen Y financial expert Peter Dunn's December 18, 2009, MediaPost blog "The Five-Second Brand," the answer is - you guessed it - a five-second brand. For example, the average Gen Yer lives life buried in a mobile device. Therefore, your five-second brand must resonate on this emerging platform. Gen Y is the generation that never had to deal with a dial-up connection; they aren't going to tolerate a brand that takes 30 seconds to explain. The five-second brand is all about meeting your audience halfway.

So, how do you make your brand shine in just five seconds? Here are Dunn's three tips to get your brand noticed by Gen Y in that brief but crucial time frame.

Authentic. There is no more annoying and cliché concept in marketing than authenticity. However, it's still a misunderstood concept that people misplay. Authenticity has nothing to do with test groups or tracking. Authenticity is like having 11 toes. You either have it, or you don't. Authenticity is your ability to let your brand's true personality shine through the messaging.

Inviting. Your audience needs to feel like they can interact with your brand. Gen Y hates being told what to do. A brand that offers open dialogue is a brand that isn't easily dismissed by a distracted Gen Yer. We're not talking about the suggestion-box mentality either. Gen Y expects to see their name alongside of your brand. You need to go far enough to literally include members of your audience in your brand.

Casual. The business suit of Gen Y is jeans. Even formal industries see the importance of casualness when targeting Gen Y. The funny thing is that Gen Y doesn't find their jeans to be casual. It's just how they are, which brings us back to authenticity.

Look deep within your brand and try to objectively evaluate its position in your marketing. You can't fake these things, but you can dig deep and discover the true voice of your brand. Can you capture their interest in five seconds?

Tactics vs. strategy: Companies misfire trying to use research as a weapon for success

Several Quirk's articles in the past few years have touched on an unfortunate trend in the research industry: companies using marketing research tactically - to validate and optimize marketing messages with consumers, or to develop new products - instead of designing and executing research strategically to impact a company or brand's direction moving forward. This practice is keeping many large organizations from fully capitalizing on the potential of marketing research, according to The Consumer's Voice - Can Your Company Hear It?, a report from competitive intelligence agency Boston Consulting Group (BCG).

More than 70 percent of the study participants apply research to inform new-product development and marketing messages, but less than 40 percent use research for decisions on pricing, promotional activities or distribution channels. Instead of looking at research as a primary source of consumer insight, it is often used to simply confirm or refute corporate expectations and then tossed aside, and the solution to this underutilization of research's power is much more complicated than throwing money at the problem. A bigger budget spent on the same research techniques could prove futile.

"Some organizations spend all of their budget on very tactical bits of data that are very hindsight-oriented. Other organizations have some of that, but they also allocate a fair amount of their spend to gathering data and insights that are much more strategic and forward-looking around where the consumer is going to go next," said Kate Manfred, a co-author of the study and principal in BCG's Chicago office.

In looking at research budgets, the study found no correlation between spending as a percent of sales and the quality of consumer insight. Rather than spending more, the critical drivers are a better balance of tactical and strategic work and maximizing the value of any spending. Success requires changes in behavior and expectations - and not just within the research department but also on the part of managers, including CEOs and senior executives.

More car shoppers happy to peruse a virtual lot

Shopping for cars online has reached parity with visits to dealer lots as the primary method for used-vehicle buyers to locate their next ride, and it's the CarSoups and AutoTraders of the world - not dealer Web sites - that are reaping the benefits of the influx in online car shopping. The percentage of used-vehicle buyers who rely on the Internet as a method for locating vehicles for sale has increased from

40 percent in 2008 to 46 percent in 2009 - equal to the percentage of buyers who visit dealer lots as their primary shopping method, according to Westlake Village, Calif., research company J.D. Power and Associates. Furthermore, 31 percent of buyers found the vehicle they ultimately purchased on the Internet, compared with 28 percent of buyers who found their vehicle by visiting dealerships.

Among used-vehicle buyers who use the Internet in their shopping process, third-party sites are visited during the shopping process much more frequently than other types of sites, including dealer Web sites. More than 90 percent of buyers say they visited at least one third-party Web site during the shopping process. Slightly more than three-fourths of used-vehicle buyers report visiting a dealer Web site.

Awareness of certified pre-owned (CPO) vehicle programs is strong, with more than 60 percent of used-vehicle buyers indicating they intend to purchase CPO vehicles at the start of their shopping process. One-half of all buyers of CPO vehicles say they used the Internet to locate used vehicles, while a slightly lower percentage (45 percent) shopped primarily by driving to dealer lots. The percentage of buyers who visited dealer Web sites specifically for CPO vehicle information has increased to 29 percent in 2009, compared with 19 percent in 2008. Other traditional sources of used-vehicle information such as newspapers, television and radio have low usage rates among buyers seeking CPO-vehicle information. For more information visit www.jdpower.com.

Is Facebook the Google of social networking?

Facebook is not only the overwhelming favorite social networking site among college students, it may also be the only one that matters. When considered among seven leading social networking sites, Facebook was viewed as "cool" by 82 percent of males and 90 percent of females, according to the 2009-2010 GenX2Z American College Student Survey, conducted by Stamford, Conn., research company Anderson Analytics. All other social networking sites were deemed "lame" by significant percentages of both male and female collegiate users. In particular, the original social networking juggernaut MySpace was considered lame by the largest portion of college students (31 percent). But Facebook isn't only beating out its dwindling social network competitors, it has even surpassed Google as the No. 1 most-popular Web site among both genders of college students surveyed.

These results seem to buck conventional wisdom, given Facebook's increasing popularity among the older adult population, including the parents and even the grandparents of the once Facebook-elite college students. "Once a trend goes mainstream, it often gradually loses its cool factor among young people, and they move on to the next big thing," said Tom H.C. Anderson, managing partner of Anderson Analytics. "Our data indicates this is not the case with Facebook. In fact, while the media has been predicting its decline, Facebook's staying power among the influential age 18-25 demographic suggests that a social networking shake-out may have occurred, and as the dust settles, it looks like Facebook is the hands-down winner."

In an equally-important development, college students of both genders are participating less in blogs and discussion boards than in previous years (down 5 percent and 8 percent, respectively, compared to 2008). These results bode well for micro-blogging sites like Twitter, whose growth flattened in the end of 2009.

Anderson predicts Facebook will also eventually make greater use of streaming media, specifically TV shows and movies. "Seventy percent of college students in our survey said they had watched either an entire television episode or full-length movie online," says Anderson. And for the first time since the survey was launched in 2005, Hulu.com, a streaming media Web site, ranked among students' 10 most-popular Web sites.

The study also revealed an interesting possible correlation between Facebook fan-page members and the popularity of certain brands with college students. For example, Coca-Cola and McDonald's ranked first in their categories between both genders surveyed. Both brands also had substantially more Facebook fans for their pages versus their respective No.

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names of note

Dale Kulp, founder of Fort Washington, Pa., research company *Marketing Systems Group*, died of pancreatic cancer at age 60 in December 2009.

Matthew Caucci has joined *Quester,* a Des Moines, Iowa, research company, as sales manager. Caucci will be based in Chicago.

Caucci Inderhees

Jason Inderhees has joined *EMI - Online Research Solutions*, Cincinnati, as sales executive.

InsightsNow, a Corvallis, Ore., research company, has named **Mark Houston** CMO.

Gazelle Global Research Services, New York, has hired **Donna Krasner** as director, business development.

Vancouver, B.C., research company *Vision Critical* has hired **Peter Harris** as managing director, Australia and New Zealand. Harris will be based in Sydney.

GfK Custom Research North America, New York, has named **Toni Shields** and **June Wallach** senior vice president.

IFF Research, London, has promoted **Jane Barlow** to associate director, brand marketing and communications.

The Coalition for Innovative Media Measurement, New York, named **Jane Clarke** managing director.

London research company *Kadence International* has appointed **Marie Laver** and **Susan Crohan** as insight director. Crohan will be based in Boston.

Stephen Genco has joined Berkeley, Calif., research company *NeuroFocus* as chief innovation officer. Additionally, NeuroFocus has added **Hans-Jochen Heinze** and **Anna Christina Nobre** to its advisory board.

The Modellers, a Salt Lake City research company, has named **Laura Kippen** senior vice president, client services. Kippen will be based in Chicago.

Nielsen Online, a New York research company, has promoted **Matt Bruce** to managing director, Australia.

Michael Davern has joined the *National Opinion Research Center* at the University of Chicago as vice president and director, public health research.

Bellevue, Wash., research company *GMI* has named **Sasha Shirangi** senior account executive. Shirangi will be based in Hamburg, Germany.

Boston research company *Chadwick Martin Bailey* has named **Don Ryan** managing director, technology.

KeyQuest Health, a Surrey, U.K., research firm, has hired **Leticia Del Gaudio** as project director.

Scott Ramsay has been named research director of *Opinion Leader*, a London research company.

Ipsos South Africa, a Johannesburg, South Africa, research company, has appointed **Wendy Shepherd** as head of loyalty. Shepherd will be based in Randburg, South Africa.

London research company *Illuminas* has hired **Kitzy Kumari** as senior research executive, child and youth team.

London research company *E-Tabs* has hired **Sandra Wright** as a client trainer in the U.S.

The Receivables Exchange, a New Orleans trading company, has named **Elaine O'Gorman** CMO. Research will be among her responsibilities.

FRANdata, an Arlington, Va., research company, has hired **Kevin O'Briant** as list database analyst.

Don Aicklen has been named COO of Cincinnati research company *ThinkVine*.

Burke, Inc., a Cincinnati research company, has promoted **Debi Wyrick** and **Bill Barnes** to senior vice president and **John Seal** to senior vice president, decision sciences. Burke has also hired **Michael Laux** as senior account executive, client services; and **John Thomas** as vice president, senior account executive, client services.

Lindsay Veling has been named managing director of *Cint USA,* an Alpharetta, Ga., division of Stockholm, Sweden, research company Cint. Veling will be based in Toronto.

Chicago research company *Synovate* has appointed **Neil Davy** as commercial director, U.K.

MTV, a New York television network, has named **Nick Shore** senior vice president, strategic insights and research.

Daren Poole has been promoted to managing director of Australia-based research company *Millward Brown Sydney*.

(Editor's note: The following is a corrected version of an entry from the January 2010 issue.)

ActusMR, a Lewisville, Texas, research company, has appointed **Jay C. Gordon, Jr.** as executive vice president and chief financial strategist.

product and service update

Techneos debuts mobile panel app

Vancouver, B.C., research software company Techneos has released the SODA 1.1 Mobile Access Platform, a mobile panel application featuring capabilities such as GPS/location capture; photo capture; and compatibility with Google Android mobile devices. The SODA system aims to provide the infrastructure required to create, deploy and manage multilingual wireless survey and engagement applications on mobile devices. The suite also provides an infrastructure for automating research methods, such as face-to-face interviewing, diary studies, digital ethnographies and mobile feedback panels. The SODA Mobile Access Platform downloads applications to mobile phones that run even when devices are offline and then connects to a wireless network as required to fetch projects and submit data. For more information visit www.techneos.com.

Vision Critical enhances technology platform; launches shopping solution

Vancouver, B.C., research company Vision Critical has rolled out its globalization expansion pack for Sparq, the company's online research platform. The update includes expanded language support for surveys and multilingual support for communities; increased user control during the survey authoring and translation process; and a multilingual reporting feature designed to allow users to choose the languages for report viewing.

In addition to the global language expansion, Vision Critical has continued its creation of interactive visual question types, namely the scale slider grid and two visual grid question types.

Separately, Vision Critical has launched ShelfsetPlus, an overhaul to the company's virtual shopper technology. ShelfsetPlus will be offered as a standardized visualization tool for product, category and shopper marketing, which aims to provide more options and faster execution. ShelfsetPlus combines interactive fly-throughs and shelfset exercises. Fly-throughs, which are intended to allow shoppers to feel like they are entering and moving around in a store, are available across 10 retail environments. Fly-throughs can also be enhanced with clickmaps, hot spots and advertising signage as respondents are at the shelf or point of purchase.

Shelfset exercises have been enhanced with couponing, two-for-one and other discounting options; multisided 2-D or 3-D product inspection; and a shopping cart that remains visible to the shopper throughout the journey. Participants can zoom in and out, read product labels, compare prices, buy items or return them to the shelf. The interface is intended for respondents to move around the aisles and add items to their cart without explicit written instructions, reducing survey length and visual clutter. All data is collected and integrated into Sparq. For more information visit www.visioncritical.com.

E-Poll dives into respondent Character

E-Poll Market Research, Encino, Calif., has launched E-Score Character into MediaSYNC, E-Poll's online interface designed to provide subscribers with access to and control of the data from E-Poll's E-Score research products.

E-Score Character aims to offer an in-depth look at the drivers of appeal as measured across various media, such as television, video games, packaging, apparel and toys. The database contains scores and rankings for hundreds of real and rendered characters. Each character receives assessments of awareness, appeal and character attributes, as well as measurements of character extendibility and affinity.

Along with the launch in MediaSYNC, the E-Score Character family of products, including E-Score Character Kids (targeting audiences ages 6–12) and E-Score Character Tots (ages 2–5), will be fielded monthly. For more information visit www.epollresearch.com.

ComScore debuts measurement tool; expands global reporting

Reston, Va., research company comScore, in conjunction with Chicago research company Information Resources Inc. (IRI), has debuted a solution that aims to measure the effectiveness of online advertising campaigns in building sales of consumer packaged-goods brands in supermarkets, drug stores, mass merchants, convenience stores and other retail channels. The solution uses IRI's Consumer Network household purchase panel to measure retail sales and comScore's ability to understand which panelists were exposed to online advertising. The solution will be integrated into comScore's AdEffx suite of products.

Separately, comScore has expanded its reporting on consumer Internet usage to include Indonesia, the Philippines and Vietnam. For more information visit www.comscore.com.

U.K. firms introduce Word of Mum panel

EasyInsites, a Surrey, U.K., research company, and Bounty, a U.K. online parenting club, have launched the Word of Mum panel. The panel will be built and maintained on the EasyExchange platform (also known as the Cint Panel Exchange), where researchers can have direct access to panelists for their own research projects. The panel aims to include 30,000 consumers, representative of young families, from those in the first trimester of pregnancy through to those whose youngest child is age 4. Along with standard demographics, profiling

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research industry news

News notes

According to data released on December 17, 2009, the **Research Industry Index** (RII), a measurement of the state of the U.S. research industry conducted by the Marketing Research Association, Glastonbury, Conn., experienced its second consecutive increase to 87 from a second-quarter 2009 score of 86. The cumulative three-point gain over a six-month period follows a decline during five consecutive quarters. The RII also reports that RFPs and proposals in the industry continue to increase.

Atlanta research company **Jackson Associates** has left **GroupNet**, a network of independently-owned and -operated focus group facilities in the U.S. Jackson Associates had been a GroupNet member since 1994.

Automated Research and Marketing, Fayetteville, Ark., has shut down its operation after nine years of business, including closing its Tulsa, Okla., location.

London research company **BrainJuicer** celebrated its 10th anniversary in December 2009.

Calendar of Events February-April

Quirk's and Globalpark will host a Webinar, themed "How MR Agencies Can Thrive in a Community-Driven World," on February 24 at 11 a.m. EST. Attendees will learn current market pressures, competitive considerations and industry trends; ways to create a vibrant feedback community; how automation and integration can turn opportunity into profit; and real-world examples of how top international brands are getting it done. The Webinar is aimed toward client-facing market research agencies and corporate market research departments. To register visit http://quirks.webex.com.

CASRO will hold its annual panel conference on February 24-25 in New Orleans. For more information visit www.casro.org.

ESOMAR will hold its global health care research conference on February 28-March 2 in New York. For more information visit www.esomar.org.

Globalpark will hold its annual mobile research conference on March 8-9 in London. For more information visit www.mobileresearchconference.com.

IIR will hold a conference, themed "Measure Up," on March 10-12 at the Conrad Hilton in Chicago. Register through Quirk's to receive a 20% discount. For more information visit www.iirusa.com/measureup/welcome-page.xml?registration=MEASURE10QUIRK.

PMRG will hold its annual national conference on March 21-23 at Disney's Contemporary Resort in Orlando, Fla. For more information visit www.pmrg.org.

The ARF will hold its annual RE:THINK! convention and expo on March 22-24 at the New York Marriott Marquis in Times Square. For more information visit www.thearf.org.

Research Magazine will hold its annual conference on March 23-24 at the Park Plaza Riverbank in London. For more information visit www.research-live.com/research2010.

ESOMAR will hold its annual Asia-Pacific conference on April 25-27 in Bangkok, Thailand. For more information visit www.esomar.org.

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.

Acquisitions/transactions

Portland, Ore., research company **Rentrak Corporation** has agreed to acquire **Nielsen EDI**, a measurement division of New York researcher The Nielsen Company. As part of the transaction, Nielsen will enter into a long-term data license agreement with Rentrak for continued access to certain box-office sales information. Nielsen EDI will be integrated into Rentrak's AMI division and its Box Office Essentials business.

Menlo Park, Calif., research company **Knowledge Networks** has acquired **Caduceus Marketing Research**, Mount Arlington, N.J., to expand its health care and pharmaceutical research capabilities.

Gartner Inc., a Stamford, Conn., research company, has agreed to acquire **AMR Research Inc.**, Boston, for approximately $64 million in cash.

Alliances/strategic partnerships

Environics Analytics, a Toronto research company, and **Research Now**, London, have partnered to code the Research Now online panel of 400,000 Canadians with PRIZMC2, Environics Analytics' segmentation system, which includes 66 consumer lifestyle types.

Naperville, Ill., research company **Millward Brown** and China-based research company **Moment Systems** have formed an alliance in which Millward Brown will provide its clients with the digital advertising monitoring system developed by Moment Systems. The companies will work together to develop new digital research and planning solutions for advertisers and their agencies.

New York researcher **The Nielsen Company** and **Catalina Marketing Corporation**, a St. Petersburg, Fla., communications company, have formed Nielsen Catalina Ventures, a joint venture to create media solutions and ROI measurement tools to connect marketing exposure to actual purchase. The collaboration will integrate information from Nielsen's purchase panels with purchase data from shoppers from a cross-section of retailers in Catalina Marketing's network.

TiVo, Alviso, Calif., and **Google**,

continued on p. 56

By William M. Briggs

Telling the future from the past: predictive versus classical statistics

There is a story about a marketing statistician who was asked by his mother what he was doing. "Modeling for Victoria's Secret," he said. "You're doing no such thing!" she said. She was shocked. She shouldn't have been, because classical statistics is a lot like a modeling lingerie.

A common experience many readers, especially of the male type, have of the Victoria's Secret catalog is to marvel at how well the models exhibit their wares. A reader, surely fixated on fashion, might closely examine a photograph and say, "This model appears ideal. Her clothing fits perfectly." Some especially attentive viewers can tell you the measurements of the garments down to the nearest fraction of an inch. They look at a model and announce, "She must not have got that outfit off the rack because there's almost no chance a ready-made garment would have fit that well. It must have been made for her." Yet, knowing this, they still buy the clothing hoping that it will do for them - or a close associate - exactly what it did for the model.

To prove the statistical marketing analogy, consider this typical scenario. Data to answer the question, "What factors are associated with overall product satisfaction?" are collected. The data is form-fit to a model. Certain data are tossed and said not to fit well; only the most flattering variables are kept. Those remaining are scrutinized. Assiduous statisticians comment on how well these variables fit the model, and state measurements of this fit. They say, "There's no way our data could fit our model by chance. Look how beautiful it is!" They tell their clients of their success, and the clients go on to use the fit of this data on this model and hope that the fit will look as good in real life.

snapshot

This article compares and contrasts predictive and classical statistics, making the case that predictive methods offer an effective way to use current data to make statements about future data.

Editor's note: William M. Briggs is a statistical consultant based in New York. He can be reached at 917-392-0691 or at matt@wmbriggs.com. To view this article online, enter article ID 20100201 at quirks.com/articles.

Undiscovered secret

The business of classical statistics, then, is judging how well data fits models. But there is an alternative to this practice called predictive inference. Its methods have been around for some time, but they are the great undiscovered secret of statistical methodology. Continuing the analogy: a predictivist would not ask how well a garment fit a Victoria's Secret model but would ask how well that clothing might fit his inamorata.

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Data Development **Worldwide**

Predictive methods use data that we have in hand (old data) to say things about data which will be collected in the future (new data). Think of it this way: we know everything there is to know about our old data, do we not? We know, for example, what percentage of women answered our surveys, we know how old they are, what products they bought, which they eschewed. And we know these things with 100 percent certainty. I often ask statisticians what I swear is a non-trick question – and it almost always stumps them. Suppose a client commissions a survey that finds 300 women and 200 men bought Product A. I ask, "Given this data, what is the probability that more women than men bought Product A?"

Ask this to a civilian and they respond, "Obviously, the probability is 1, or 100 percent, because 300 women bought Product A and only 200 men bought it, and 300 is certainly more than 200." This is the right answer.

But statisticians bypass the simple question and substitute it for another difficult, self-imposed query, which they refuse to answer without being provided more information. "You need to tell us how many women and men were offered the opportunity of buying." Say 1,000 of each; that is, 1,000 women and 1,000 men had the chance to buy.

This starts them calculating. Invariably, a chorus will call out something like, "The parameter estimates are 0.30 and 0.20. The p-value in a z-test is pretty small, say, $p < 0.001$. We reject the null hypothesis that the proportion of women and men who bought the product is equal. We conclude that the proportions are different!" Parameters? P-values? What is all this?

Future customers

The client who commissioned our study wanted not only to know about the people surveyed, he was curious about future customers, too. But suppose his interest was solely in those 2,000 original people, then he would be done. He wouldn't need any statisticians, either, because he could answer any question he had about his data just by counting. How many women bought A? Just count. How many buyers were men older than 25? Just count.

We would instead like to use the old data to quantify uncertainty of our client's entire universe of customers. Then we could answer questions like, "Given our sample, what is the probability more women than men in the future will buy Product A?"

Predictive statistics directly answers questions like this. Or, for example, like, "What is the probability that future shoppers will be more satisfied with Product B?" Notice that these are questions about observable data – amounts, counts, dollars.

Classical statistics cannot make direct statements about observable data like predictive statistics can. Instead, its focus is entirely on probability models, which are mathematical formulas that require for their existence strange entities called parameters. The mean of a normal distribution is a parameter, for example. Parameters are hidden, unknown and unknowable numbers that must be plugged into models before they work.

Even though parameters are unknowable, there are ways to guess their values. After guessing, we can calculate p-values, which are indirect measures of model fit. In fact, all talk of null and alternate hypotheses, etc., is nothing but statements of how well the probability model fit the old data – the old data which we already know all about. Even stronger, these statements are conditional on suppositions about the hidden parameters, and not about the observable data – a fact about which most are unaware. This is why statistics is confusing to most people: It is confusing!

Results are agnostic

Predictivist procedures also use probability models, but its results are agnostic about parameters, which never appear in its answers. Often, predictivist and classical methods use identical models, but the classical methods stop after making guesses about parameter values, while the predictivist methods continue on to make probability statements about future observable data.

The classical procedure ends with, "Given the parameters for men and women buying Product A are equal, the probability of seeing a test statistic larger than the one we got is 0.0001" – which is the correct, but difficult to remember, definition of a p-value. The predictivist answer is more informative: e.g., "Given the data, the probability that twice as many women than men will buy is 9 percent." Predictivist methods can answer any question about the observable data a client might have.

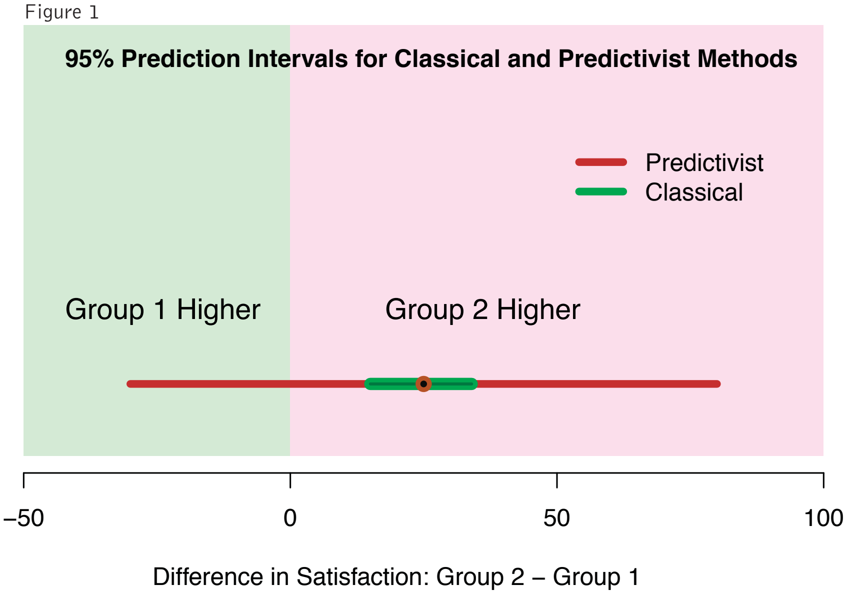
P-values give highly inflated views of the strength of fit, too. For example, the p-value in our buying example is 0.000003 – which sounds like women and men are worlds apart. But the predictivist probability of the next woman buying and the next man not buying Product A is only 28 percent! This overcertainty arises because it is easier to be surer of parameter values than it is of actual observations.

Another example is provided in Figure 1. Two groups were polled about overall satisfaction (a number between 0 and 100). Group 2 was on average 25 points higher than Group 1. The classical 95 percent confidence interval of that difference is in green, where it appears we have good evidence Group 2 is higher. However, this confidence interval is for the difference in group parameters.

The predictivist method instead asks, "What is the range of actual differences in satisfaction scores I'm likely to see in future groups of people?" This range (in red) is much larger than the interval for the difference of parameters: it even shows there is a good chance Group 1 has higher scores!

When people first see this example – which is a typical one: predictivist intervals are always wider than classical ones – they complain that the predictivist interval is too

Figure 1



wide, and that the decision about which group had higher ratings is easier to make classically. This is true: but remember the predictivist interval is a statement about real data we'll actually see. And we are not after easy decisions, but correct ones.

Excessive certainty can be costly. In the buying example, suppose the client wants to allocate an advertising budget according to the statistical findings. Using classical methods might cause him to ignore males completely, while the predictive-inference findings suggest that while it's likely more women than men buy, it's not overwhelmingly probable that this will be true in the future.

Training has been limited

There are matching predictivist procedures for each classical method: regression, PLS, ANOVA, etc. So why aren't predictivist methods used more often? Mostly because training for them has been limited, thus many statisticians aren't familiar with the philosophy upon which these new methods are built. Luckily, this is changing as new books and classes appear regularly. Further, predictivist statistical methods are now available in packages like R, Sawtooth, WinBUGS and SAS.

They are no panacea, however, and can't be used for every application. And you can still make a mistake using them - but not the dangerous mistake of being too sure of yourself. | Q

When you test, test well

Enter article ID 20070210 at www.quirks.com/articles for tips on using multivariable testing as a strategic marketing tool.

By Emily Goon

Friends or foes? The Internet vs. the music industry

How Sony BMG used the Web to reach a disappearing audience

The advent of the Web has arguably been the most radical game-changer in the history of the music industry since the radio. In a shift that seemed to happen overnight, brick-and-mortar music stores, CDs and the Sony Walkman began seeming outdated in the presence of iTunes, MP3s, P2P file-sharing, iPods and – of course – illegal music downloading. While the Internet has streamlined the way the modern 21st-century world experiences music and made it much less-costly (even free in some instances – Pandora and Grooveshark, anyone?), the major players in the music industry struggled to quickly understand the changes in consumption (Who is still buying? Why do they buy? Where are they spending? What will make them buy more? Where can we reach them?).

Music sales plunged 40 percent from 2000 and 2007, and industry employment decreased by one-third in the past 10 years, with the tech-driven changes in music consumption behavior cited by many as the cause of the declines. The increase in music-purchasing (or music-stealing) options required the larger production and distribution companies to focus on gaining faster, deeper and better insight into the consumer mind-set to ensure that they produce more hits and fewer flops, saving both time and money. The major record labels and music entertainment companies needed to prove that they were still relevant, and more than that they needed to appear to be on the cutting edge of trends and technology; to be the source for all things music entertainment; and to make it as efficient (and appealing) as possible for consumers to influence what goes to market and what stays home.

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snapshot

After losing a chunk of its audience to Web-based music consumption, Sony BMG teamed up with Globalpark to create an online panel of music fans to gain faster, deeper insight using "surveytainment."

Harness the power

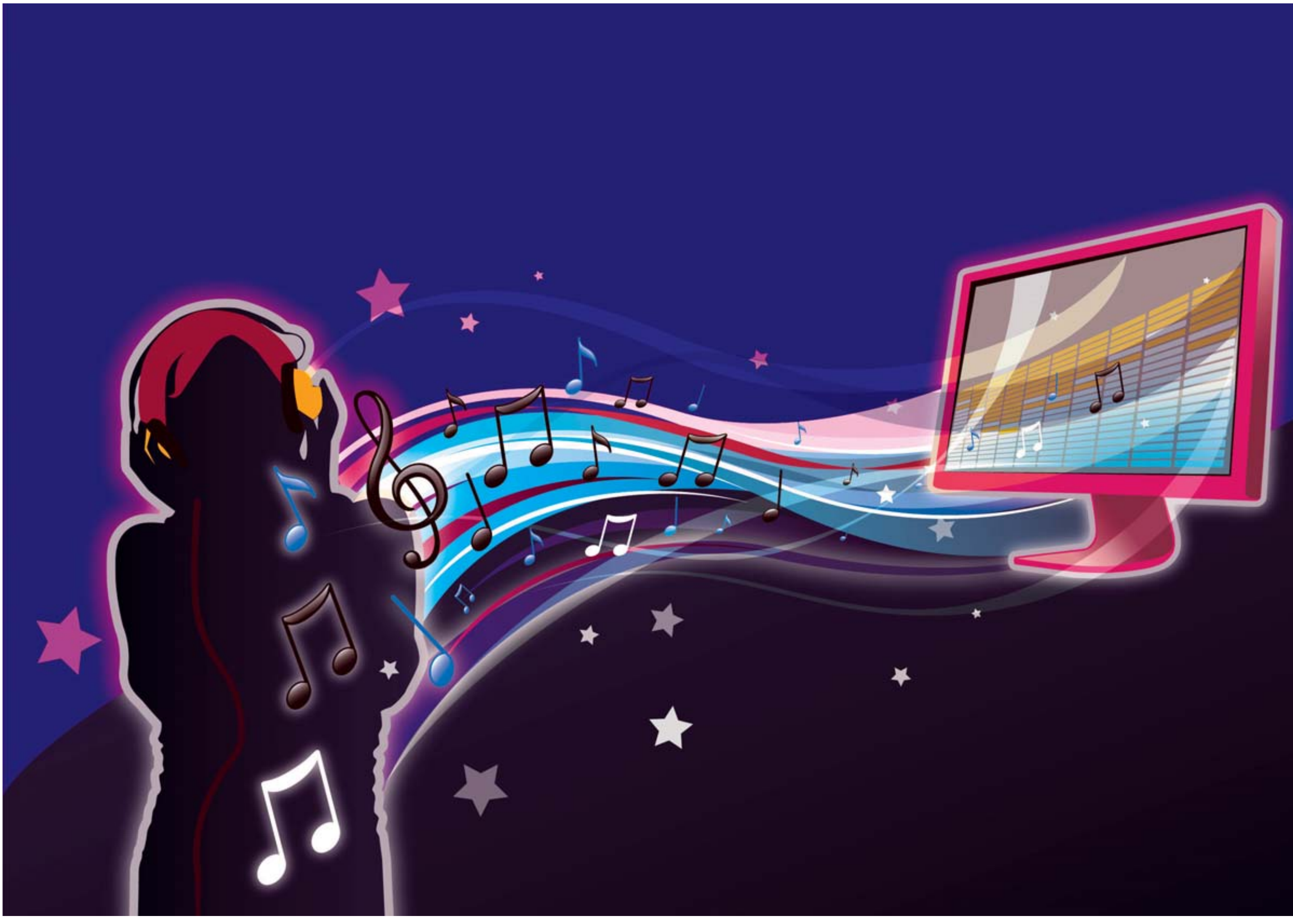
While the Internet has been the source of many of the music industry's problems, Sony BMG Music Entertainment, Munich, Germany, has found a way to harness the Web's power and use it to its advantage. Sony BMG and others realized that although the Internet-driven shift would require an overhaul of the music production and distribution business model, it also was producing more highly-engaged and active consumers who are prolific in their purchasing, sharing, listening and watching, thanks to the ease, speed and accessibility of new technology.

Since most music fans are looking to the Web for their music-related needs, why not meet them where they already are, with tools they already know how to use? Online multimedia functionality not only revolutionized music consumption, it also opened the door for research to come alive. Survey respondents are no longer required to recall a song from a written title or imagine a music video from a paragraph-long description and a few screen shots. Instead, respondents can react immediately to a song, video or product as they experience it, providing more informed and valuable insight.

Didn't consider the Internet

Unfortunately for Sony its prior methods of analyzing key consumer purchase drivers didn't consider the Internet as the newest major vendor in music and didn't produce results accurate or timely enough to help meet demands and target releases. Before July 2007, Sony gathered consumer contact information primarily via CD insert cards, and approximately one-fifth of consumers who responded agreed to allow their data to be used for research. The submitted data was then stored and saved in Sony's consumer database and Sony would occasionally send questionnaires via e-mail or traditional mail to these consumers. Postal questionnaires were sent out yearly, and e-mail questionnaires were sent out approximately 10 to 15 times per year. But the questionnaires were one-dimensional and focused on consumer reaction; they only scratched the surface and did not provide a deeper understanding of the consumer, says Michael Puetz, director of customer relationship management (CRM) in the media and strategy division of Sony.

In addition to the periodic questionnaires, Sony had its own very basic online survey panel in place. The company wanted to establish a consumer insights process to understand the wishes, needs and attitudes



of its consumers, but the solution was primarily based on data that was captured offline via the CD insert consumer feedback cards, and response rates were rather poor, says Puetz. The research reached mostly hard-copy purchasers through a digital medium - excluding the very online consumers at the core of the industry's downfall who most needed to be reached, understood and accommodated.

The final element to Sony's research model was conducting ongoing benchmarking projects to determine best practices and gather competitive intelligence to uncover competitors' strategies and tactics. Throughout the benchmarking process, Sony discovered that Warner Music Group, also in Germany, had established an online survey panel of its own, and Sony recognized that Warner's solution, provided by Cologne, Germany, research software company Globalpark, was more sophisticated and potentially effective than what Sony had been able to do internally.

Update its tools

So, to keep in time with the competition (and the evolving music market), Sony chose to update its online survey tools. The objectives of the revamp were threefold:

- use the latest survey technology, operating on a modern platform;
- build a substantial proprietary online panel, comprising participants having a high affinity to music/entertainment; and
- link panelist data with Sony's CRM/consumer database via a Web interface.

In short, Sony sought to cope with the challenge of doing market research for hundreds of projects with rapid turnaround time by establishing ongoing (and convenient) relationships with its most invested and enthusiastic consumers. Sony looked to an online panel solution as an efficient way to get closer to consumers and pull them together in an at-the-ready online community to gather input instead of having to go out into the marketplace and physically sample every item, every time. The new panel needed to provide insight and answer Sony's most pressing questions: Which artists should we sign? How do we design an album? Where do we sell it? What kinds of concerts are consumers attending? How are they experiencing music in the clubs?

Sony selected Globalpark and its tools because of Globalpark's experience with the entertainment/music industry (specifically with Warner Music Group and Universal Music Group); its platform's multifunctional capabilities, such as offering standard types of questionnaires as well as the ability to set up a media library and insert audio and video clips into surveys; its belief in the benefits of "surveytainment" (more on that later); and the possibility of expanding into communities, wherein panelists can discuss already-completed surveys.

In July 2007, Globalpark account manager Andreas Knappstein began working with Sony to launch www.musikfreund.de, an online panel site for Sony's consumer audience. The musikfreund.de panel was built and set up as a collaborative effort between Globalpark and Sony and is controlled by Sony. The software is integrated with the Sony music system and the company's established branding.

German-speaking panelists

To begin the panel-building process, Sony set out to recruit German-speaking panelists having a high affinity to music/entertainment via its CRM and Web assets. Sony installed a button/link in every artist or company e-newsletter, as well as on most of its artist and label Web sites, that allows consumers to opt in and join the panel. Sony classifies the panel into three sub-panels to be able to address the panelists as accurately as possible:

Young and Hip - consumers who are typically the fans of hip-hop, alternative, R&B, etc. and speak in a modern, colloquial style (e.g., using "hey" as a greeting).

Mainstream - consumers characterized by liking mainstream music and speaking in a common modern way (e.g., using "Hello, [first name]" as a greeting, the German "du" address).

Classical - generally older respondents who purchase classical music or jazz (German *schlager* or *volksmusic*) and speak in a very polite way (e.g., addressing a person as "Dear Mr./Mrs.", the German "Sie" address).

Sub-panels are contacted for surveys based on what questions various departments have, and the Mainstream group is the core - approximately 90 percent of Sony's surveys refer to this group. Over 75 percent of respondents in the Young and Hip and Mainstream sub-panels respond to questionnaires within the first three days, whereas those in the Classical group tend to need more time. In total, the panel comprises several thousand participants, although Sony prefers the exact number to remain confidential.

Surveys are constructed and administered to panelists internally by Sony's insights team (Puetz and two others) using the designed questionnaires in the Globalpark program, and Sony also places surveys on Web sites of individual artists to test the potential to market artists as a brand.

Sony is able to incorporate MP3s, video clips, images and a whiteboard application into its regular survey questionnaires to explore how panelists feel about national and international artists (namely newcomers, or artists new to the industry or label) to help artists-and-repertoire (A&R) decision makers decide whether to sign an artist or release a product.

In the case of international artists, if panel feedback is negative, A&R will most likely decline to release the artist in Germany, but in the case of domestic artists, panel feedback can help A&R decision makers alter the look, feel and sound to better suit the interests of Germans. If A&R decides to move forward with an artist or product, the song and image tests become a vehicle for new product analysis, and panel responses aid in establishing a marketing concept. For example, panelists were asked about music flatrates, where customers pay a monthly fee for unlimited music, to determine the accepted price range for such offers.

'Surveytainment'

Many of the methods Sony implements in its online questionnaires include what Globalpark refers to as "surveytainment," a way of making survey questions more emotional, engaging and - above all - fun for the participant. Surveytainment uses eye-catching, modern question types and technology, including Windows-driven graphic capabilities, audio and video clips, drag-and-drop rankings and collaborative tools. Using the whiteboard application, for instance, panelists can show Sony what they think would make an attractive cover by rearranging and altering the images provided. And although more complex, it is also possible for panelists to upload their own imagery or text for a true collaborative product innovation.

According to Globalpark, surveytainment's aim is to make the research process more engaging and effective. The key is to make sure that these new techniques are applied to increase understanding, not distract from the main objective. For example, the more imagery on a screen, the less likely the participant will actually read any long question text, relying on inference versus the written word. But applied correctly, surveytainment can bolster quantitative studies and bring a qualitative component to research as well.

And, according to Sony, the ideas behind surveytainment have unique importance in the music/entertainment industry as they introduce sound and imagery into questions that would otherwise be static or require respondents to rely on recall.

Surveytainment bridges the gap between in-person interviewing and independent survey-taking. Before the aid of the Web and digital recordings, song and video testing with the masses was limited and financially impractical. It's no longer eight people in a focus group responding to a CD on a stereo system – it's thousands of active music consumers experiencing the song or video in their natural music-listening habitat: online, in their own homes and offices.

Internet savvy may be the reason consumers stray from traditional consumption habits, but it's Internet savvy on research's part that makes understanding and anticipating consumers' needs – and their next step – possible.

Became the main part

The musikfreund.de panel indeed replaced a few ad-hoc research processes and became the main part of Sony's day-to-day research business. For example, because panelists can hear audio during a survey, tests of developed songs have been particularly successful for Sony, says Puetz. Further, with the help of the online panel, Sony consumers have become a regular component of the company's artist-and-repertoire and marketing decisions. As a result, consumers are now reliable partners in developing new business models and proofs of concepts, such as the creation of various flatrate offerings.

Ultimately, the panel serves as the basis for Sony's actions surrounding virtually every aspect of new artists and products and is a major part of the decision-making process for Sony's marketing team. The panel assists in creating target group profiles, including information about media usage, which becomes useful for advertising, marketing and media plans once a product is launched. The panelists in the target group profiles then come to represent different types of consumers (varying in age, gender, music taste, media use, etc.), and the feedback provided by the panelists is used to understand and predict how an artist or product will perform in the market. Furthermore, because the musikfreund.de panel and the Sony Music Germany consumer/CRM database are linked, certain results within the target groups of panelists can be transferred to the database to be used for special announcements, offers, promotions, recommendations, etc.

And panelists seem to like it, too! Sony has asked panelists about the panel itself, and contrary to expectations, panelists requested more questionnaires (in a higher frequency) rather than fewer, says Puetz, and the majority pointed out that participating in the music panel is more important than the incentives.

A long time coming

The music industry's adjustment to cater to its Web-centric audience may have seemed a long time coming, but what first appeared as a death sentence for music production and distribution companies turned out to be a boon: The Internet not only fostered the development of more active and valuable music fans but it streamlined the way research could reach, explore and market to them.

Getting a wide range of consumers involved in the creation, selection and marketing processes early on can increase their sense of investment in and connection to the end-product. By listening to music lovers and providing them a creative and more interactive way to tell the industry what most interests them, Sony and companies like it are poised to better match product and audience and deliver entertainment and merchandise that will succeed in the marketplace. | Q

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ethnographic research

By Hy Mariampolski, Letícia Moreira Casotti and Maribel Carvalho Suarez

Creating beauty at the base of the pyramid

Brazilian hair care firm Beleza Natural thrives by keeping close to its roots

Duque de Caxias is a Brazilian city of over 800,000 just north of Rio de Janeiro city limits, right on the flight path into Antonio Carlos Jobim International Airport. Better known for its smoky petrochemical plants than for fashionable beaches, Caxias, as most people call it, is an orderly though gritty town whose working class and service economy are benefiting from Brazil's sudden surge of prosperity. Nevertheless, it is a place that Cariocas – as Rio's denizens call themselves – are likely to avoid as they speed through the city over its highways on their way to mountainside country homes. For even the most intrepid tourists, Caxias is invisible despite its Oscar Niemeyer-designed public library, which is justifiably a source of local pride.

The commercial center of Caxias features one of the most successful outlets run by Beleza Natural, a chain of beauty salons and related hair care products targeted to Brazil's women of color. More than 65 percent of Brazil's population has the wavy-to-kinky hair that reveals roots in Africa and this had always been an issue for black and mixed-race Brazilians. That is, until Beleza Natural – which translates as "natural beauty" – began to promote products and services that gave its generally low-income consumer segments an alternative.

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snapshot

On-site visits help researchers understand the icons and ideals used by a Brazilian hair care firm to both inspire and form a bond with its working-class customers.

"When a black woman enters a traditional salon, she feels discriminated against," says Leila, the business school-educated sister-in-law of the company's founder, who today heads Beleza Natural's marketing and public relations efforts. (Note: We adhere to the Brazilian custom of using only the first name or nickname to show familiarity and admiration. For example, the country's president, Luiz Inácio Lula da Silva, is universally known simply as Lula.) "It's not just a social thing but also a hair care issue." This is the basis of Beleza Natural's brand equity - delivering the most effective products in an environment perfectly suited to its customers' otherwise unmet hair and beauty needs.

Bold challenge

Numerous case studies have proliferated in the academic literature following C.K. Prahalad's bold challenge in his book *The Fortune at the Bottom of the Pyramid*:

"If we stop thinking of the poor as victims or as a burden and start thinking of them as resilient and creative entrepreneurs and value-conscious consumers, a whole new world of opportunity will open up."

A good deal of this scholarship has described how useful and effective marketing principles can be as a tool for economic advancement among the poor. Whether on behalf of multinational corporations seeking to expand sales among what has become known as the "base of the pyramid" (BOP) or in support of indigenous entrepreneurs originating in developing segments, advocates of this approach have demonstrated that bottom-up models of economic growth can augment or even substitute for top-down, government-driven programs.

These studies concur that citizens of modest means indeed represent a poorly-served but eager market for goods and services and they stress the importance of appropriately scaled financial, production and distribution units in product development and sales. Many also point to the advantages of engaging BOP consumers in co-creation and co-marketing of products targeted to their segment.

Latent power

Beleza Natural certainly represents a model for how low-income entrepreneurs all over the world can use the latent power of the underclass to achieve marketing success. It aims to be more than a hair care company because it strives to deliver personal empowerment and economic development alongside its beauty products.

In order to better understand the basis of the Beleza Natural brand value

proposition and to gain insights into how its equity could be extended, our team visited two salons in January 2009 to make observations and conduct informal interviews with staff and customers. Participant observation is the traditional ethnographic technique for gaining consumer insights and we must confess that our principal author immersed himself in the experience beyond the call of duty and was given a full hair treatment.

The Beleza Natural brand is completely entwined in the personality and story of its founder, Zica. Starting as a maid, nanny and street vendor, Zica eventually undertook training as a hair stylist. In this role, she became passionate about the absence of appropriate products to care for Afro-Brazilian women's hair. Working with local suppliers and using her own family and loyal customers for experimentation, she finally came up with a formula to meet their needs.

She sought to go into business with her husband, Jair Conde. However, her determination was not enough when she appealed to bankers for financing. Unable to raise capital for the venture, her brother Rogerio and his fiancée Leila offered a solution. Joining forces, the young couple on the eve of their wedding took the money they had intended to use for buying furniture and, instead, invested in the business.

Leila had risen through the ranks at McDonald's from server to manager, before undertaking an executive MBA at the COPPEAD Graduate Program of the Federal University of Rio de Janeiro and was able to bring her business knowledge and management understanding to bear on the growing hair care operation.

Anthropologists often talk about the importance of creation myths in substantiating belief systems that generate meaning to social groups. The story of the chain's founding provides Beleza Natural with a symbol for the yearnings of its customer base. Similarly, Zica's character and qualities offer a role model while being emblematic of the brand personality: pretty, of humble origin, accustomed to hard work, talented and eager to advance economically.

Zica's initials conveniently express the brand's core values and are emblazoned on placards throughout the store: "Zeal - Innovation - Competence - Atmosphere." These are values that customers almost never hear from other brands that target them.

Prahalad has argued, in a similar vein, that marketing success with BOP consumers is based on ensuring that brands embody such values as dignity, choice, attention, respect and trust. Beleza Natural certainly communicates these ideals in the salon's physical space, its brand image, product array, consumer understanding, customer service model and personnel policies.

Bustling array

Our team, together with Leila, enters Beleza Natural from the noisy, crowded shopping street. The outside world of downtown Caxias is a bustling array of small shops featuring stacks of clothes, school supplies, snacks and drinks, consumer electronics, hardware and repair shops and other personal care establishments. A string of waiting buses belch smoke. The shop is located two blocks from a large *favela*, an informal squatter settlement, rife with crime and gang warfare, not far from Rio's main garbage dump.

The contrast is dramatic. The salon is an open, airy and grandly scaled, two-story retail space, staffed with dozens of young and attractive women drawn from the same neighborhoods as their customers.

The environment may seem somewhat antiseptic to many North Americans, with its bright lighting and tiled walls that seem more like a well-run hospital or health clinic than a beauty salon. However, to its local customers, the bright colors of the interior, exquisite detailing in marble and granite and unexpected touches like gossip magazines and fresh flowers invite customers to linger and enhance the store's aspirational image. Above all, the space communicates feelings of safety, security and caring.

There is a queue with over a dozen women waiting at the reception desk that leaves us momentarily concerned that the long wait is inconsistent with the salon's service philosophy. Quite the contrary, we are assured by the customers, who think of being in line at Beleza Natural as a display of social status and an opportunity to watch the action and make new friends - much like the feelings of trendy young people lining up at the entryways of nightclubs on Los Angeles' Sunset Strip.

All of the staff and most customers recognize Leila when we enter and her infectious charm radiates as though she were a celebrity film star instead of the boss. Deep hugs, double cheek kisses and questions about kids, parents and boyfriends greet the staff, smartly attired in white uniforms. Leila is equally friendly toward a sampling of customers and she needs no introduction. She thanks people for coming, asks where they are coming from and compliments many on their new hairstyles. As she steps away and allows her guests to preen before her, Leila makes them feel like the stars of her show.

Highly personalized

Beleza Natural's service delivery process may seem a bit bureaucratized and standardized for North American middle-class tastes. Nevertheless, it is organized for efficiency yet highly personalized at every step of the way. Moreover, the process is totally consistent with its customers' expectations.

The service experience begins with an intake interview that captures critical information about the customer's tastes and hair characteristics in a computer database. This record then tracks the customer's interactions with the brand over time and provides continuous marketing information.

This is not the only way that Beleza Natural tracks its customers. Zica, Leila and other members of the leadership team reach out to current users and prospects by visiting them at the factories where they work and scheduling special breakfasts and lunches to gather feedback and promote new offerings. They conduct monthly customer satisfaction tracking studies. Additionally, in-store suggestion boxes labeled "Speak with Zica" and Web-based communication methods guarantee that customers know that the brand listens to their concerns.

The typical visit to the salon takes

about an hour and 20 minutes, during which customers are walked through specialized work areas for shampooing, coloring, cutting, conditioning, etc. At each location, they are passed along to personnel who interact constantly, offering tips while chatting about things in general. Validation and promoting self-worth are consistent features of the entire experience. Stylists are encouraged to take a friendly and helpful approach, acting as advisors and consultants to women who customarily don't have access to professional hair care advice, teaching women about beauty and techniques of personal care.

Encouraged to be reborn

The salon is a safe-zone where customers are granted freedom of personal indulgence and encouraged to be reborn into an alternative self-concept. Inside Beleza Natural, they are no longer slum-dwellers living on society's margins.

Beleza Natural's service personnel are role models drawn from the same neighborhoods as their customers and are professionalized through internal training programs that share the ethos as well as grooming techniques.

Marisa (not her real name), a confident, well-spoken and attractive 22-year-old, is a typical staff member. Working at the salon for six months at the time we spoke, Marisa had been a Beleza Natural customer before setting her career aspirations in the direction of hair care. She reports having struggled for six months to gain a position at the salon following her breakup with a boyfriend. Asked about her feelings about working for Beleza Natural, she cheerfully says, "It has helped me regain my sense of self-worth but I have not yet replaced my boyfriend."

Aspirational image

Decorative posters throughout the store and a sumptuously-printed catalog feature gorgeous models showcasing the hairstyles available at Beleza Natural. Everyone knows that these women are selected from the salon's customers and service personnel, some of whom have parlayed their in-store debut into lucrative modeling careers.

Salon surface materials and designs are higher than what is normally affordable to its customers; the brand personifies an aspirational image. Consequently, it is often associated with special occasions and critical experiences - such as weddings, birthdays, celebrations, going on a job interview, starting a new job - rather than regular usage.

Pricing is also highly aspirational. A full-service treatment costs 90 reais (about $50), which represents approximately 20 percent of the monthly salary of the salon's targeted segments. As a convenience to its customers, Beleza Natural allows them to pay the fee over three installments. Brazil's poor are notorious for saving money for indulgences; a famous song celebrates how people save for an entire year for their fabulous Carnaval costumes. Similarly, a Beleza Natural treatment is considered a treat worth saving for.

People's aspirations are commonly expressed through their children. Not surprisingly, Beleza Natural provides an extensive program of child care so kids can enjoy the environment while their parents are receiving treatments. Additionally, it features child-scaled fixturing and stylists who specialize in children's hair care. A promotional program focused on Zicquinha (Little Zica), a juvenile cartoon version of the chain's founder, illustrates the section of the shop focused on younger customers.

Since treatments are expensive, Beleza Natural encourages customers to bring home the brand between visits with reasonably-priced hair care products. Sold exclusively at the salons, the extensive product line helps customers preserve the styles they have achieved inside the store while also keeping the brand alive in their homes on a daily basis.

Loyalty and devotion

In the last 15 years Beleza Natural has grown from nothing into a significant regional brand. It has cultivated loyalty and devotion by delivering products and services that meet customers' needs in an environment based on choice, attention, respect and trust, consistent with best practices for marketing to the base of the pyramid. The brand and its leadership symbolize customers' own aspirations and achievements.

Constant communication guarantees that that the brand experience continues to deliver something unique and special. Most importantly, Beleza Natural acts as an economic development program in the neighborhoods in which it operates, raising the income and status of its workers. At the same time, the operation consistently advances the self-image, empowerment and strivings of its customers. It is not a stranger within its community but organically linked to the story that it tells and the pride it promotes. | Q ethnographic research

Watch me as I buy

How online observational techniques help qualitative researchers keep pace with the speed of consumers

By Matt Schroder

Imagine the ethnographic research technique of task observation – say, perhaps, observing a consumer while they shop for clothing in a department store. Before the Internet, consumers were likely seeing their clothing choices for the first time, unless they happened to see the item in a circular or catalog.

Now imagine doing that same task in the online era. You observe your subjects as they enter the store, but they go right to the new dress they want, grab it from the rack and take it to the checkout counter and leave. That creates a big gap in the understanding of how a purchase decision was made. The problem, of course, is that the customer did their research and made their comparisons, color choices and style decisions somewhere else: in front of their computer.

To get the ethnography insights needed in the Internet Age, researchers are realizing the need to supplement their methodologies with observational techniques that take usability testing into the respondent's environment, with the researcher in a remote location. "Research tools are changing rapidly, and we expect them to keep changing," says Abby Leafe, president of the Qualitative Research Consultants Association (QRCA), St. Paul, Minn. "No one method is always right every time – we always try to balance cost against the client's objectives. A skilled researcher can suggest multiple approaches to achieve business goals."

Ethnographic studies were founded on the idea that consumers are best understood in the fullest possible context, including: the places where they live, work, play and shop; how they are making a living and providing food, housing and energy for themselves; the language(s) they speak and so on.

What's changing is the information and experiences that consumers are exposed to before, during and after they're being observed in those environments. The proliferation of the Internet, especially hand-held wireless devices, is changing the game. And the qualitative research industry is keeping pace.

snapshot

Honda (UK) used Web-based usability and ethnography techniques to fine-tune the interface of its Web site's used-car-buying section, allowing it to make a number of adjustments and better understand car seekers' preferences.

More intuitive

In early 2009, Honda (UK) rethought the part of its Web site aimed at used-car buyers. The previous site used the common dropdown menu page design where users pick their model and price range to come up with available used cars. A new design was created to make the search experience easier and more intuitive to use, and to distinguish Honda from competitor sites.

QRCA member Jamie Hamilton, managing partner of U.K.-based

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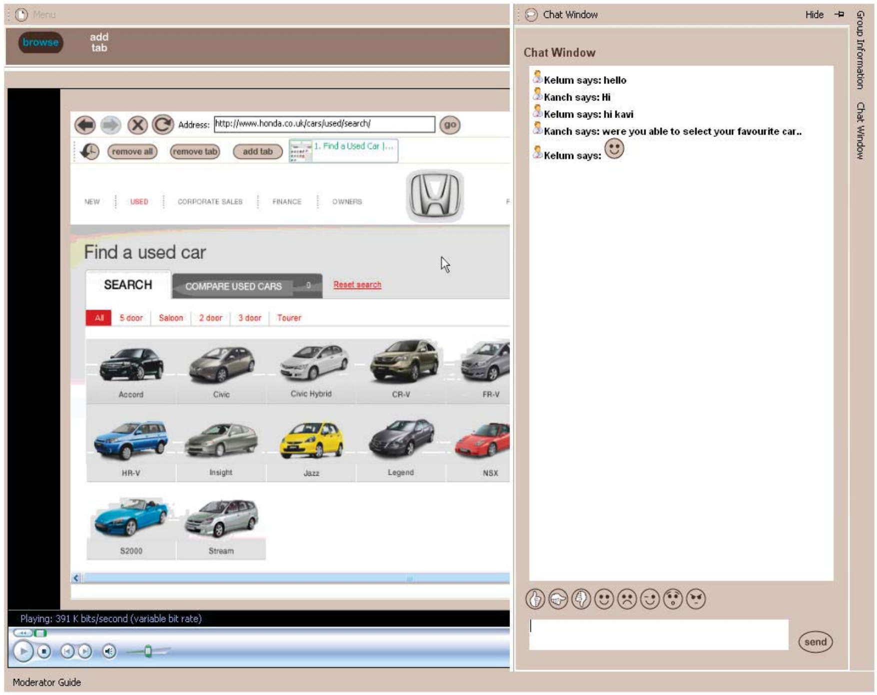
research firm Nqual, worked with U.K. research agency Simpson Carpenter to conduct the qualitative research for Honda (UK). The team combined Internet-based research and application-sharing technology with the aim of unobtrusively observing and capturing natural online behavior.

The methodology is simple. Participants are given a single or set of online tasks to perform on their home computer. Immediately prior to the session, the moderator calls the participant to get a sense of how they expect they will perform the task. The participant is then left to perform the task(s) uninterrupted while the moderator, usability expert and client team remotely observe their journey. Immediately following the task(s), while the participant's experience is fresh in the mind, an online recording of the journey is played back to them with the moderator and client teams navigating to, and asking questions about, points of interest they have tagged during the session.

Of the sessions Hamilton's team conducted for Honda, half of the participants were Honda owners who had purchased their used car using the old Honda Web site. The other half were people who had purchased any car from another Web site. Users who had purchased their last car on the site were asked to "buy" their old car on the new site and compare the user experience. Users who had purchased their existing car from another site were asked to buy the exact same car on the Honda (UK) site and compare the experience.



Users who had purchased their existing car from another site were asked to buy the same car on the Honda (UK) site and compare the experience. A recording of their actions was then played back to them with the moderator and client teams asking about points of interest tagged during the session.

"We call our approach 'e-thnography' because although our context is online, we have the same goal as classic ethnography – to non-intrusively observe as close to natural behavior as possible," Hamilton says. "Unlike standard usability testing, participants were not in an unfamiliar research facility or testing lab – they were in the comfort of their own home, at their own computer. Unquestionably, observer effects, moderator interjections and unnatural environments and procedures distort findings. When seeking to understand any natural performance – skiing, dancing, stand-up comedy – it is counterproductive to conduct the study out-of-context and continually interrupt the performer mid-flow to ask questions. It is for this reason that we capture the participants' journeys and reactions remotely, whilst tagging points-of-interest en route. Only when they're done do we explore events and experiences with them by reference to a shared online recording of their journey."

Honda (UK) is getting essential feedback on the new used-car selection tool. It is making a range of usability tweaks and attaining an understanding of the higher-level preferences, motivations and dispositions of a variety of Web site visitors and users. "To give one example: amongst participants who set their own starting point for the exercise there emerged several categories of behavior based on the level of patience and method they demonstrated," Hamilton says. "These categories employed different search engine techniques, reached the tool by various routes and landing pages, and had distinctive approaches to absorbing site information and learning the ropes. Findings such as these showed that improvements to search engine optimization, and tweaks to Web site design and usability, should be catered to different behavioral categories operating in a wider context, as well as expected user-end goals, and statistical findings."

This technique can offer cost efficiencies over doing a study in a usability lab, which requires the renting of venues and equipment and potentially includes travel costs, Hamilton says. "Doing everything remotely, online, is also very fast. Within four days of commissioning the project, we found the participants and we were conducting our first sessions. Transcripts and recorded files were available immediately for analysis, and the process was further accelerated by being able to trial suggested improvements and theories with later participants," he says.

Same benefits apply

Those who practice these online observational techniques report that all the same benefits of traditional ethnography apply, including holistic observation, real-life insights and the ability to minimize the "research effect." The difference of course is the ability to take advantage of the Internet, with two billion people online worldwide. "An online presence is a prerequisite for modern businesses. In fact, Web sites are increasingly the main communications channel as well as often being a purchasing channel," says QRCA member Kasia Gandhi, associate director of U.K. research firm RS Consulting Ltd., who co-presented with Hamilton on this topic at a recent QRCA annual conference.

However, while many companies often spend an enormous amount of money on their digital presence, they often do not truly understand their consumers' behavior and how to keep them interested in their Web site. Site hits, page views, visitors and referrers are important metrics, but they are not all-telling. Web analytics offer only aggregate data: they tell us the what but not the who and why. They reveal little about visitor motivations and needs, which underpin decision-making, or how each Web site fits into the larger landscape of the Internet. "What we're talking about is showing the participant a recording of what they did while it is fresh in their memory, and in most cases they are able to articulate why they did it," Gandhi says. "In fact, the increasing importance of Internet assets, combined with the limitations of lab usability testing and analytics, were directly responsible for this breakthrough."

QRCA researchers suggest there are several other applications where this solution could apply, including:

Understanding online behaviors and attitudes - such as the online decision-making process, online purchase habits, how information is gathered, and understanding "disengaged surfing."

Qualitative Web usability testing - getting subjective insights on the user experience, evaluating Web design, and examining insights derived from quantitative Web usability testing.

Advertising tests - online ad evaluations and viral marketing tests.

Analysis - conducting competitive Web site analysis or problem discovery.

Important distinctions

Hamilton stresses that the specific methodology used in the Honda (UK) case, referenced earlier as "e-thnography," should be distinguished from online ethnography, a term which has been employed to describe an online diary/blog/immersive methodology which involves participants writing about their behavior in the real world, and using the Internet merely as a reporting mechanism. Ethnography in its classic sense is an observational methodology which aims at objectivity and therefore "online ethnography" can be confusing to research buyers.

What was achieved in the Honda (UK) project was the study of human behavior within the virtual world of the Internet. It is therefore much closer to the traditional definition of ethnography, a time-tested and proven technique within the qualitative research industry. "We've found terminology can be a very interesting topic to discuss among researchers within QRCA," Leafe says. "The needs of research buyers are always changing, and the rules of the virtual world are moving so quickly. While it's important to clearly define what our terms mean, it's that much more important to focus squarely on the needs of the company doing the research and finding the most credible, effective qualitative solution for them. That's what was done in this case, and that's what will keep the solutions we as qualitative researchers can offer viable into the next decade." | Q special markets: employees

When 'soft' numbers have a hard impact

Why managers should care about employee loyalty

By Timothy Keiningham, Lerzan Aksoy and Luke Williams

The Ipsos Loyalty Study, the largest study of its kind ever conducted, found that less than 30 percent of U.S. employees strongly agree that they are loyal to their company. Only about 25 percent of U.S. employees think their employer has earned their loyalty.

The long-term success of any company depends heavily upon the quality and loyalty of its people. Few corporate executives would disagree with this idea conceptually. But it is also true that most treat the economic value of employees as "soft" numbers, unlike the "hard" numbers they use to manage their operations, such as the cost of labor.

Employees are obviously critical to a company's production and in enhancing customer relationships along with company profits, but the problem is that when the going gets tough, managers focus on the hard numbers alone and are all too quick to disengage from the soft aspect of their businesses.

The result is that today we are overwhelmed with downsizings and restructurings. Layoffs make the front pages of our newspapers regularly. And while Wall Street often rewards layoffs by treating them as a sign that management is serious about getting a company's financial house in order, the reality is quite different. Most organizations that downsize fail to realize any long-term cost savings or efficiencies, which necessitates further restructurings and layoffs.

And the truth is that at some point every company will go through tough times. That is the nature of business cycles. But just as the contraction cycle of business inevitably forces many to overlook the impact of these soft numbers, the inevitable growth cycle quickly rekindles the importance of what employees bring to their roles as both the engines of company production as well as the portal to client relationships. The problem is that what is unceremoniously neglected in downturns is difficult to reinvigorate when healthier markets return.

snapshot

In tough times, staff downsizing is almost inevitable. But rather than focusing on the cost savings that result from letting workers go, companies must conduct research with the remaining employees to measure their opinions and attitudes.

All too real

Although the cost benefits of downsizing tend to be mirages that dissipate in the longer-term, the corresponding pain to customers and employees is immediate and all too real. Research using the American Customer Satisfaction Index found that those firms that engaged in substantial downsizing experienced large declines in customer satisfaction. Unfortunately for those firms, this index has proven to be a good predictor of future earnings.

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The Ipsos study's authors note that "The current trend toward downsizing in U.S. firms may increase productivity in the short term, but the downsized firms' future financial performance will suffer if repeat business is dependent on labor-intensive customized service." This means that any business that relies on a serviceable client ought to be tuned in to its soft numbers prior to reconfiguring the service model and consider what impact a possible change to that model might have.

The impact on the organization's culture is also severe. Downsizings result in rumor-filled paranoia and desk-loading, whereby a staffing cut occurs and the remaining employees are left with the task of carrying the burden of the recently-evicted. Typically, such cost-saving gimmicks are wrought with overwork and underappreciation, resulting in disengaged or volatile working environments.

When Coca-Cola instituted a restructuring that resulted in the loss of thousands of jobs, the company became so awash in far-fetched stories that executives were forced to take the unusual step of intervening to quash them. Worse still, the employees who do remain often find themselves jaded. It isn't hard to find employees who feel exactly like Dan after his company's layoffs in Mitchell Lee Marks' *Charging Back Up the Hill*:

"There is no loyalty here; no one is going the extra mile after this. Two years ago, we worked 65-hour weeks. People were willing to do it, because it was a great place to work and we were doing something that mattered. ... From here on in, it's just a job for me. I'll put in my 40 hours and that's it."

Let's be clear: No CEO relishes the thought of layoffs. They understand that real people and real families are affected by these cuts, but they also understand clearly that their companies are floundering and in need of strong action. History, however, has shown us that the pain often outweighs any long-term financial gains.

If companies are going to grow their way out of difficult times (and excel in good times), they need two things: 1) for their customers to stick with them, and 2) to improve their productivity. But this only happens through an organization of committed, loyal employees.

Greater payoff

Benjamin Schneider, professor emeritus at the University of Maryland, has shown conclusively that the employee's loyalty-related attitudes precede a firm's financial and market performance. And there is a much greater payoff in working on improving the "human factor" than people think. Researchers at the University of Pennsylvania found that spending 10 percent of a company's revenue on capital improvements increases productivity by 3.9 percent. But investing that same amount in developing the employee capital more than doubles that amount, to a whopping 8.5 percent.

It is one thing to believe that employee loyalty results in positive financial outcomes, it is quite another to quantify those outcomes. But if we are going to be able to resist our natural inclinations to focus exclusively on short-term solutions in difficult times, then we need to become very proficient at understanding what the real implications are for employee loyalty and, in turn, the long-term health of businesses.

The place to begin at your company is by asking, "How loyal are our employees really?" Doing this requires that you meaningfully solicit feedback from all employees (management included). Not only should this be treated as a real research investigation - employee surveys are worthless if not executed impartially and anonymously - but you must also be willing to ask truly tough questions. For example:

- How do our managers' relationship styles impact the organization's service climate and employee loyalty?
- Does the company provide the necessary tools and training for employees to perform their jobs well?
- Is a commitment to serve customers rewarded and encouraged by the organization?
- Does the company demonstrate that it deserves the loyalty of its employees?

There will of course be other dimensions that are of concern for your particular organization or industry. The key is to identify those few, vital dimensions that are most essential for your success. Once you have identified these dimensions, you must measure them in a clear, objective, and rigorous manner.

Once you know where you stand vis-à-vis employee loyalty, you must then link this information to the performance drivers of your business. Typically, these come down to four drivers: productivity, employee turnover, customer loyalty and revenue.

The ability to statistically link each of these measures to employee loyalty is relatively straightforward. The key is to aggregate employee data into groups that meaningfully link to turnover, customer loyalty and revenue. For example, a retail chain might find store-level analysis to be the most relevant unit, since customer loyalty and revenue are tracked at this level, and stores typically have semi-independent management.

Always meaningful

Though any proper research effort comes with an investment of both time and energy, the correlation between employee-loyalty-related attitudes and business outcomes is always meaningful from a practical and managerially-relevant perspective; so it is worth the effort. In fact, a large-scale study conducted by researchers Harter, Schmidt and Hayes presented compelling evidence that employee-loyalty-related attitudes were positively linked to each of the four performance drivers.

Managers can also elevate the level of data effectiveness by studying the performance of their most loyal business units and scrutinize how their success is influenced by managers' own relationship styles with the customers they serve and the employees under their charge.

Despite the ability to develop research and obtain this information - and thereby gain invaluable managerial insight - most companies do nothing (or next to nothing) in this regard. But the problem of linking the soft numbers to the hard numbers is not that the information doesn't exist or that there aren't professionals to consult with on putting the data to work. The No. 1 problem is simply a lack of willingness to pull the data contained in various departments together and undertake a challenging process through which underlying fissures might be discovered.

Why isn't all the extra effort put in to assemble the data? We don't want to hear bad news. And without question, this kind of internal examination always yields some bad news. But managers and CEOs who are honestly committed to enhancing their business are willing to take in all news, good and bad, in order to effectively mend what ails their companies and prevents them from being more productive. And the path to profitability is through the effectiveness, drive, efforts and loyalty of their employees.

Deserves their loyalty

The reality is that employees are only as loyal to their company as they believe their company is loyal to them. This is true almost everywhere in the world! So in the end, building an organization of committed, loyal employees ultimately comes down to demonstrating to employees that the company deserves their loyalty. And with their most powerful asset harnessed, businesses will see their hard numbers of revenue and production climbing. | Q special markets: kids

Seeing it through their eyes

Research shows the power of telling a good story when creating advertising aimed at kids

By Charles Young

From their earliest years, kids are exposed to a lot of advertising, and some of it, such as the advertising on Saturday morning television, is targeted directly to them. Advertisers trying to engage the attention and emotions of this younger audience face a difficult challenge because we as adults have outgrown the ability to see the world through the eyes of our childhood.

Given their level of cognitive development, kids relate better to concrete visuals than they do to abstract words. Indeed, the mental concept of a "brand" emerges late in childhood. If you ask an eight-year-old what brands are, they are likely to describe brands as simple product categories, e.g., "brands are like cars and trucks." By age 10, most will understand that brands represent the advertised differences between different brands of cereal, for example. Younger children are more likely to be character-loyal than brand-loyal, meaning they are likely to ask mom for Trix because they like the Silly Rabbit they know from the commercials.

Researchers trying to understand how children respond to advertising need to develop nonverbal techniques for probing their reactions. Our own approach is to use the same Picture Sorts technique that we've developed for analyzing television commercials among a general adult audience. We have used the technique for conducting quantitative research among kids and it can even be used in a qualitative setting for children beginning around the age of four or five.

For us, an appealing aspect of using Picture Sorts with children's research is that it brings a lot of "play value" to the interview. Watching children sorting pictures from a television commercial on various sorting boards makes it clear that kids feel that this part of the interview is more like a game. In contrast, the verbal part of the interview may feel like schoolwork so that children will sometimes struggle to find the answers they think the adult interviewers are looking for.

Even the online version, which is conducted with kids over the age of six, is designed to be a fun, game-like activity. The first picture sort, for example, brings up a sampling of visuals from the ad in randomized order and asks children to click a button indicating whether or not they remember seeing the image in the ad. Other sorts ask the children to click buttons reporting how they feel about each image, or what each image means to them.

Importantly, the information we collect from these picture-play activities produces results that provide valid

snapshot

Marketing to kids requires the ability to harness the power of pictures, the author argues. Teaching adult marketers how to look at a brand and view a commercial as a child does is the most valuable contribution researchers can make to the creative development process.

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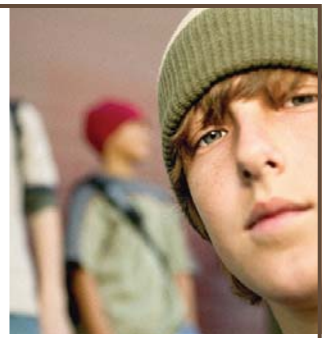
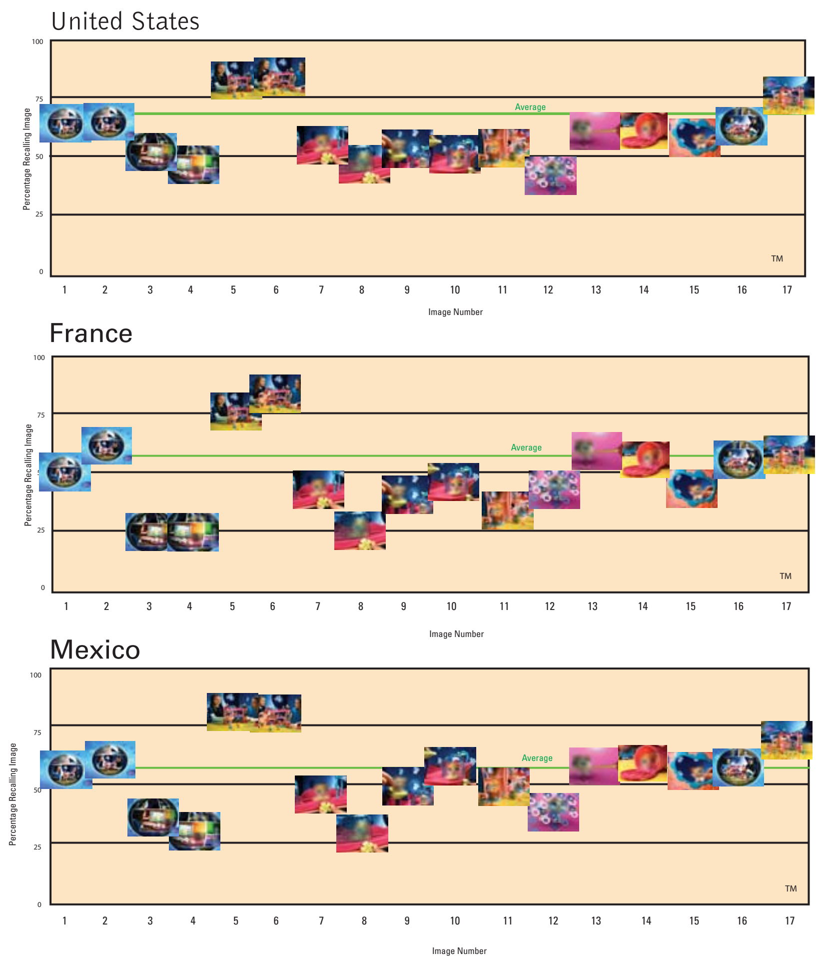



insights into the performance of kid-targeted TV ads. For example, Figure 1 shows the Flow of Attention for a commercial that was tested online in the U.S., France and Mexico. This is a normal-looking pattern of moment-by-moment visual recall that we have found to be predictive of commercial attention-getting power and recall across a variety of product categories. What's unusual about this attention graph is that it was generated by online interviews among girls aged six to nine years old!

Figure 1

Flow of Attention® for 6–9 year-olds



In some respects the information conveyed in the Flow of Attention graphs is akin to the distraction-attention research used early in the development of Sesame Street as reported by Malcolm Gladwell in *The Tipping Point*. In commenting on what engages the attention of young children, Gladwell said: "Kids don't watch when they are stimulated and look away when they are bored. They watch when they understand and look away when they are confused."

The Flow of Attention graph measures more than whether kids are looking toward the television or not; it is designed to measure how images are filtered by the mind, the processes of selective perception that are essential to the act of seeing. As with adults, the contour and peak content of the attention flow graph is a predictor of the overall attention-getting power of an ad, which we measure in the context of a clutter reel of other ads competing for kids' attention.

The most important factor shaping the Flow of Attention is the narrative structure of the commercial. Does it tell a good story? As you can tell from the parallel peaks and valleys of the attention flow graphs shown in Figure 1, this form of research is quantitative proof of the universal power of film. Visual storytelling engages the attention of kids at a very early age, regardless of differences in culture and language.

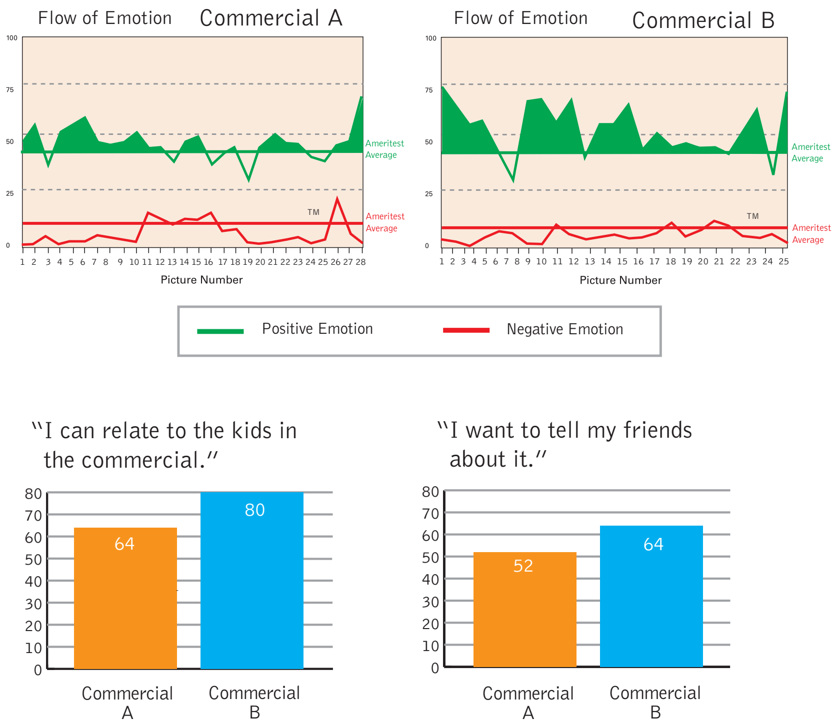
Continues to develop

Current scientific research on the biology of the brain shows that the underlying neural circuitry of the brain continues to develop throughout childhood all the way to early adulthood. Importantly, modern brain imaging techniques can now show how the brain develops from back to front. The frontal lobes - which make

Figure 2

Flow of Emotion Comparison

Positive emotion is higher, and negative emotion is lower for Commercial B.



up the part of the brain that controls reasoning, problem-solving, planning and impulse management - are not fully developed until our late teens.

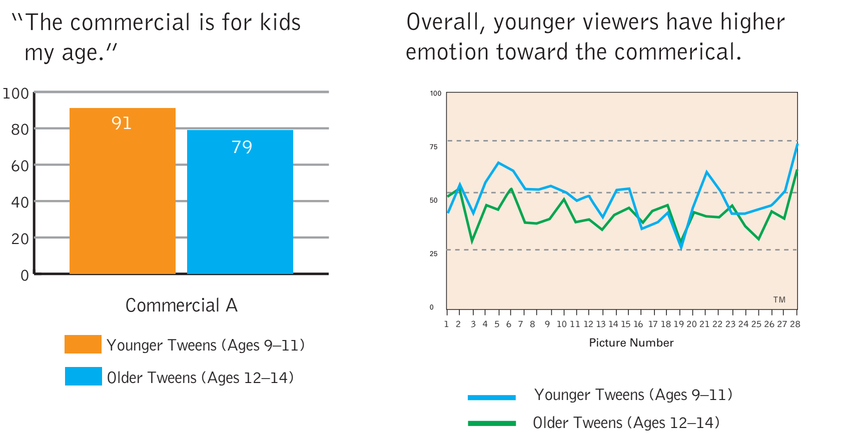
The frontal lobes manage emotional urges. This explains why tweens can interpret a parent's normal tone of voice as yelling, or why they may misinterpret nonverbal cues and quickly turn aggressive. Emotional response to advertising, therefore, is an important aspect of how advertising works with a young audience.

We can see the important role that emotion plays in kid-targeted television advertising by looking at the response to two commercials for the same brand of kids' snacks, shown in Figure 2. In our test of these two ads, Commercial B scored higher than Commercial A on the key report-card measures of attention and motivation. The most important diagnostic measure explaining the differences in performance between these two commercials is our Flow of Emotion, which shows that the level of positive emotional engagement is significantly higher for Commercial B than for Commercial A.

The way we measure emotional engagement is to use a second picture-sorting technique where kids are simply asked to sort pictures based on how they were feeling at different moments in a commercial rather than on what they remember. The flow graphs show the positive feelings (indicated by a simple "smiley face" emoticon in the survey) versus the negative feelings (indicated by a "frowning face" emoticon in the survey) for each moment in an ad. This is an easy task for even

Figure 3

Drivers of Attention: Age Comparison



young children to perform (we can do it with children as young as four years old in a focus group) and it is predictive of a commercial's overall performance.

To gain additional insights into kids' reactions to these two ads, we can also ask a battery of commercial ratings statements, which is an abbreviated version of the list we use in our adult test.

These ratings tell us that tweens find the kids featured in Commercial B more relatable than the kids featured in Commercial A. And, as a result, Commercial B will likely generate more buzz - that is, it is more likely to be "a commercial I would tell my friends about."

Kids are quite sensitive to differences in development between kids slightly older compared to kids slightly younger than themselves. Indeed, one of the strongest predictors of advertising effectiveness among kids is the perception that the advertising is targeted to their own age group or to kids who are slightly older.

When we drilled down into the data by age of respondent in the case of the snack-food commercials we just described, we found that the weakness of Commercial A is due to the fact that the commercial generates less emotional engagement among older tweens, age 12 to 14, than it does among younger tweens, ages 9–11, as you can see in Figure 3.

The reasons for this are both the casting of younger-looking actors in Commercial A as well as the fact that some of the effects used in the commercial are more likely to appeal to a younger child's sense of magic and are less credible to older kids. As a result, older kids are less likely to rate the commercial as one that is "for kids my own age" and are more likely to report, in response to open-ended questions, that this is a commercial for "little kids." As anyone familiar with marketing to children would know, the perception that something is for kids younger than rather than older than the respondent is the kiss of death.

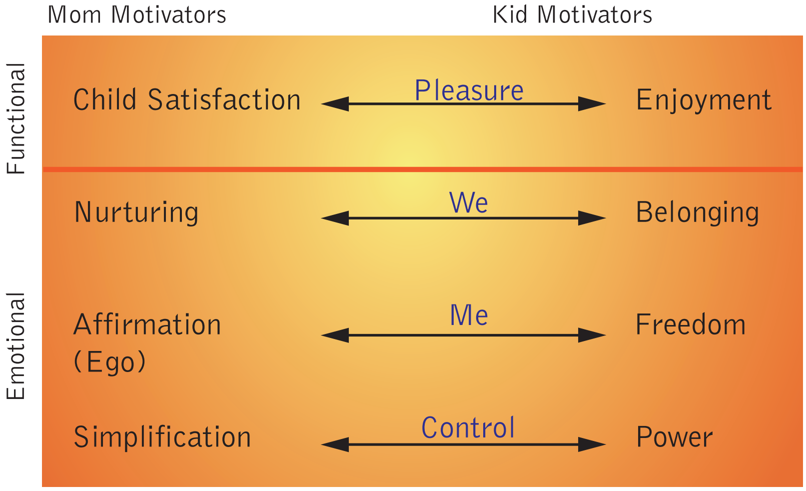
Functional and emotional

As with adults, kids respond to brands both on a functional and on an emotional level. On a functional level, for example, a snack-food product needs to be tailored to fit a child's palate, or a toy needs to be age-appropriate in terms of the demands it makes, e.g., on small motor skills and physical coordination. On a less rational level, kid brands satisfy higher-level emotional needs, and advertising effectiveness depends on how well these emotional benefits are communicated.

A wide literature exists describing the emotional need-states of children. But we have found that a short list of emotional motivators for kids can provide a useful framework for ad researchers analyzing how well a kid-targeted ad is working on an emotional level. These four motivators, described in a model developed by marketing researchers Tim Coffey, David Siegel and Gregory Livingston in their book *Marketing to the New Super Consumer:*

Figure 4

Emotional Motivators for Kids Mirror Moms' Motivators



Mom & Kid, are the need for: 1) enjoyment (fun), 2) belonging, 3) freedom and 4) power.

Interestingly, we find that the emotional need-states of moms mirror the emotional needs of children. They are merely two sides of the same coin (see Figure 4). The four primary emotional motivators Coffey and team cited for moms are the need for: 1) child satisfaction, 2) nurturing, 3) affirmation (ego) and 4) simplification.

To determine if an ad is working on any of these emotional levels, key pictures from the picture-sorting exercise can be used to probe the emotional meaning of the imagery in an ad. Young children find it relatively easier to talk at length about concrete images taken from an ad than to express their feelings about the meaning of the ad as a whole. The following examples illustrate the kind of insights into the elements of advertising effectiveness provided by such simple photographic probing.

Motivator 1: Enjoyment/child satisfaction

The underlying dimension of emotional response is that of pleasure. From a child's perspective, the pleasurable emotions are expressed as enjoyment that is made visible by showing kids his or her own age having fun playing with the toy or eating the food. If you're marketing to kids, fun is a benefit that needs to be built into the product at its core. For example, kid-targeted snacks like Kellogg's Gripz appeal to kids on the basic level of taste and satiety, while the size and portable design also offer amusement and a level of interactivity with the food.

From the mom's perspective, a bite-and-smile image of kids enjoying the product provides reassurance that her child will actually eat the food. A chief source of dissatisfaction for moms is to waste money by buying food that a child won't eat or a toy he won't play with.

Motivator 2: Belonging/nurturing

This underlying dimension of emotional response turns on relationships to others, and in particular the "we-ness" of parent and child. There is a fundamental emotional need to belong, which is expressed as a feeling of being close to others. For very young children, this explains the appeal of stuffed animals, which children may see as companions, and dolls, which young girls can care for. As kids get older, they develop the need to relate to other kids and be accepted by their peers. Transformers are an example of a physical product - now a movie franchise - that helps introduce young boys to the concept of belonging to or identifying with a group, e.g., the Autobots or Decepticons.

Parents experience this need in the opposite direction as feelings of nurturing. One part of mom's need to nurture is reflected in advertising that reassures her of the healthiness of the food that she serves her children. Ads that communicate the educational value of toys that aid her child's development, both mentally and physically, also tap into this emotion.

Motivator 3: Freedom/affirmation

The third underlying dimension of emotional response is centered on self-identity, the "me" that is separate from the "we." As kids develop, the need for freedom becomes an increasingly important emotional motivator. Products that offer choices and independence, like the Game of Life, appeal to kids on this level. One recent Heinz Ketchup commercial leverages this emotion by showing a boy building his perfect burger.

Babies aren't born with handbooks, and new moms seek affirmation that they are doing a good job. As children grow and pursue the need for personal freedom by seeking emotional distance from their parents, moms' need to feel appreciated evolves. Images in ads that demonstrate the appreciation of the family - for example reaction shots that overtly acknowledge mom's role in providing an appetizing, albeit healthy meal - provide important affirmation of her identity as the mother.

Motivator 4: Power/simplification

The fourth underlying dimension of emotional response is the emotional striving for control. As kids develop physically and mentally, they feel the need to control their environments and master increasingly difficult tasks. Video games tap into this need for mastery. Dynamic action figures like Transformers also tap into this emotion by giving kids control over what shape the toys take. A recent Eggo waffle commercial appealed to this emotional need by featuring different ways that kids customize their breakfast.

From a parent's perspective, the increasingly complex developmental needs of maturing children evoke an opposite desire for simplicity. One form in which this longing is expressed is in the importance of durability. Mom wants to know the things she buys will last. Tonka appeals to this need with its "built for boyhood" tagline. Another version of this emotional benefit is the desire to eliminate family conflict. Mom wants to feel confident that the products she buys will be accepted and used without a fight. Furthermore, product appeals that bring the family together for quality time without conflict, for example the Monopoly board game, touch on this mom motivator.

Most important thing

After testing a great many kid-targeted ads for clients in a variety of categories, we draw an overall conclusion that emotion is the most important thing and the thing that's hardest to get right in developing effective advertising. Visuals are the primary source of emotion in a television commercial, and teaching adult marketers how to look at a brand and how to see a commercial through the eyes of a child is the most valuable contribution researchers can make to the creative development process. | Q

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Kids will (and want to) be kids

Understanding kid and tween brand affinity

By Wynne Tyree

Marketers estimate that young consumers participate in more than $500 billion in consumer spending each year. While the dollar amounts vary, there is consensus that kids and tweens are critical consumers to reach for three basic reasons: they spend their own money on goods and services; they influence how their parents (and grandparents) will spend their money; and they will, ideally, become even more lucrative brand consumers in the future.

How young consumers really feel about brands and, consequently, how to create brands that resonate with young consumers across all ages and genders, however, has yet to be a topic of serious investigation. The market research industry has been vigilant about understanding brand perceptions, value and loyalty among adults, but this type of work has been absent in the youth market research space - where ethnographies, mini-groups, online product evaluations, lifestyle studies and trend reports dominate.

To fill this information gap, our firm created Young Love, a study designed to bring statistical and strategic rigor to the understanding of how young consumers think and feel about brands. The nine-month study of 6-to-12-year-olds and their parents consisted of more than 9,000 interviews across 260 brands and over 20 categories. From apparel to beverages to entertainment brands, the study measures youth brand affinity on a scale of 0 to 1,000. Referred to as a brand's Kidfinity score (K), this metric is a weighted algorithm that factors in data on variables such as brand awareness, love and popularity.

snapshot

Rather than being me-focused and anxious to grow up, most kids and tweens are interested in brands meant for them that bring families together, according to research by the author's firm. This article provides eight key drivers in creating a brand that will win with kids/tweens and their parents.

Young Love is the combination of exploratory qualitative research, online surveys with more than 4,700 kids and their parents (separately) and follow-up qualitative research to enrich the quantitative findings. Begun in May 2009, the quantitative component is the heart of the study. From the quantitative data come:

- the Kidfinity metric and scores;
- the identification of core drivers of affinity - by category and across categories;
- the exploration of the statistical relationship between Kidfinity and usage, frequency of usage and future usage; and
- the means by which the study

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attempts to demystify the intricate relationship between kid and parent brand affinity.

The online survey of a representative sample of U.S. households with children was designed so that each child/tween evaluated 12-25 brands of the 260+ brands, depending on his/her age. The total number of brands each child/tween assessed was capped by age to minimize survey fatigue and maximize data reliability. All brands were randomized to ensure that each kid/tween had an equal likelihood of evaluating any given brand, and age quotas were set per brand to ensure that at least 60 respondents of each age (6-12) assessed each brand. The end result was learning from approximately 420 kids/tweens per brand.

Brands were assessed using brand logos rather than brand names (in text only). The visual representation of brands via logos was a critical decision as logos:

- make the survey instrument more visually stimulating and engaging;
- help young/rudimentary readers easily participate;
- immediately evoke brand associations/relationships in a way text does not; and
- serve as the primary means by which brands are represented to young consumers.

Smarty Pants' learning in the youth research space has shown that the insights yielded from exposing the golden arches, for example, is considerably richer than when exposing the word McDonald's. The former makes an immediate, real world-replicating connection; the latter requires kids to do additional cognitive work to move from the written word to the brand association.

The online user interface was designed to be highly engaging for young participants, allowing them to drag and drop logos, match brands to attributes and type in their own reasons why they love specific brands. The outcome was a Kidfinity model with a .87 correlation with current usage and .90 correlation with future usage; clarity on which variables drive affinity and to what degree; and more than 100,000 verbatims.

Top 50 Kidfinity Scores

Overall Ranking	Brand	Kidfinity Score
1	Wii	916
2	Nintendo DS	897
3	Oreo	887
4	McDonald's	880
5	M&M'S	875
6	Doritos	860
7	Nickelodeon	860
8	Kraft Macaroni & Cheese	857
9	Cheetos	849
10	Disney	846
11	Popsicle	846
12	iPod	846
13	Disney Channel	843
14	PlayStation	840
15	Reese's	839
16	Crayola	838
17	Cartoon Network	838
18	Chips Ahoy!	835
19	Pizza Hut	834
20	Toys"R"Us	832
21	Burger King	831
22	Nick.com	829
23	Starburst	829
24	Skittles	828
25	Lunchables	824
26	Pringles	821
27	Capri Sun	821
28	Fruit by the Foot	814
29	Drumstick	810
30	Fruit Roll-Ups	809
31	PSP	806
32	Kool-Aid	805
33	Fruit Gushers	804
34	Eggo	801
35	SpongeBob SquarePants	801
36	You Tube	799
37	Pop-Tarts	799
38	Pepsi	798
39	Twix	798
40	Bubblicious	796
41	Ring Pop	795
42	Xbox	794
43	Wonka	794
44	Chuck E. Cheese's	794
45	Bubble Tape	791
46	iCarly	791
47	Coca-Cola	790
48	Subway	789
49	Goldfish	789
50	Mario	788

Who's winning?

So who's winning in the kid/tween market? Results show that kids are not as me-focused and anxious to grow up as we might have thought. Instead, young consumers gravitate toward affordable, cross-gender, cross-generational brands their parents would approve of. The Wii (K = 916), followed by Nintendo's DS (K = 897), top the chart for boys and girls, across ages. The two brands deliver engaging, age-appropriate content that doesn't alienate parents, and there are games/activities to delight almost all kids/tweens. Oreo (K = 887), McDonald's (K = 880) and M&M'S (K = 875) round out the top five, meeting kids' needs for permissible indulgence, variety and affordability – not to mention great taste.

Interestingly, the boy and girl lists are more similar than expected. With few new additions, the Top 50 lists for boys and girls are a reshuffling of brands. The same takes place when looking at kids (6-8 years old) versus tweens (9-12 years old). The data serve as a reminder that it's possible to create brands that delight 6-to-12-year-old boys and girls. In fact, it's a necessity in today's competitive business climate.

Eight key drivers

The study finds that the brands that win with 6-to-12-year-olds across gender are those that deliver on eight key (cross-category) drivers.

Age-appropriate. Kids and tweens embrace brands that feel safe and kid-friendly. Contrary to popular perceptions, teen- and/or adult-centric content, ads or product executions actually decrease Kidfinity. This is one of the reasons brands such as Capri Sun (K = 821) and SpongeBob SquarePants (K = 801) outperform brands like Red Bull (K = 411) and *The Family Guy* (K = 574). The data clearly show that while, yes, kids and tweens don't want brands that are "for kids younger than me," they also shy away from those that they believe are "for kids older than me" – an attribute that essentially means "not for me."

Parent approval. Highly correlated with age-appropriate, parent approval increases Kidfinity. In fact, it's the No. 2 cross-category driver of youth brand affinity. This debunks popular myths that kids want what they can't have. The data clearly show that the opposite is true: When brands are approved, access is greater, and affinity grows with consistent brand interactions. Approval also leads to greater family cohesion - something kids/tweens want just as badly as parents.

Quality family time. In 2010, young consumers will continue to connect with their families much like they did in 2009. With game-changing brands like Wii (K = 916) dominating family interactive leisure and Kraft Mac & Cheese (K = 857) leading main meal offerings, it's easy to see that those brands that kids/tweens can share with their siblings and parents rise to the top. It's important for marketers to remember that winning brands for kids/tweens don't divide the family; they allow for co-consumption, co-entertainment and, simply, cooperation. Think M&M'S (K = 875), not Pop Rocks (K = 724); think Monopoly (K = 727), not Pokemon (K = 579).

Ease of use. When a kid/tween can easily engage with the products offered by a brand, it increases the likelihood that they form a relationship with the brand. The result is that Kidfinity increases as "easy to do/make/use/eat" increases. Flagship brands like Easy Mac (K = 767), Lego (K = 743) and iPod (K = 846) rank among the 20 easiest brands from a kid/tween point of view, reminding us that complexity is not always a good thing.

Variety/choice. Coming of age means gaining independence, exploring new options and the excitement of making your own decisions. Brands that meet these needs through variety (i.e., color, form, shape, flavor, etc.) keep kids/tweens coming back. Whether in the plethora of products offered by Crayola (K = 838) or the seemingly-limitless number of flavors offered by Pop Tarts (K = 799), kids and tweens are clear that they love brands that help satisfy their desires to try new things and make their own choices. Subway is a great example of a brand that is gaining considerable traction by leveraging the variety/choices that are organic to the brand. With a Kidfinity score of 789 and a No. 3 rank on the variety/choice attribute, it's a brand to watch, particularly among the tween set that is more ready to experiment and call the shots.

Cool. Not surprisingly, the elusive "cool" is a driver of Kidfinity. But what our study helps elucidate is that cool really means fascinating in form or function. When kids/tweens are intrigued, impressed or surprised (in a good way) by a product, they believe that the (consumer-facing) brand that makes that product is cool. They also believe that quality impacts cool. Apple (K = 742), for instance, is cool because it makes products that kids think are aesthetically pleasing, high quality and have a "wow factor." Keep in mind that these product-based attributes ultimately drive cool; the social perceptions of cool are a by-product of design and functionality fascination.

Chatter-worthy advertising. Great advertising matters to kids/tweens, but it doesn't have to be kid-directed. M&M'S (K = 875) and Oreo (K = 887), for instance, have great ads that speak to kids/tweens, although they are not youth targeted. In an era of co-consumed media and family co-consumption, chatter-worthy advertising that drives Kidfinity is just as likely to come from a Coca-Cola (K = 790) as it is from a Lucky Charms (K = 759). Look for ways to deliver on humor, simple messages and the unexpected, because kids/tweens enjoy advertising not only for what it teaches them about a brand but also for its entertainment value.

Affordability. Kids and tweens, particularly in 2010, understand value and want brands that are affordable. Affordability to kids/tweens translates to either "I can buy it with my own money" or "It doesn't cost too much money." Both of these dimensions of affordability help brands like Popsicle (K = 846) and Snickers (K = 772) stay on top. At the end of the day, affordability either becomes a reason a child will personally purchase or request from a parent (with the affordability leverage point called out).

Delight kids and parents

So, what do kids and tweens want? They want familiar, iconic brands that delight kids and parents with variety, value, family-friendly content and simple pleasures. Gadgetry and just-for-kids messages diminish in importance when considering that young consumers care as much about those around them as they do themselves. It's a gentle reminder that childhood is still childhood and family is more important than ever. | Q

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2 competitors. Strikingly, Coke Facebook fans outnumbered Pepsi fans by approximately 20 to 1. For more information visit www.andersonanalytics.com.

CEOs - not ex-politicos - persuasive in endorsements

When it comes to helping sell, almost two in five U.S. adults find business leaders to be most persuasive when they endorse a product in an ad, according to a study from Rochester, N.Y., research company Harris Interactive. On the other hand, 39 percent of Americans say they find former political figures to be least persuasive when they endorse a product or service. And the age groups being targeted are a factor as well; certain celebrities are seen as more persuasive by different age ranges.

Looking at other types of celebrities and their persuasiveness, 21 percent say they find athletes to be most persuasive; 18 percent say television or movie stars are most persuasive; 14 percent say singers or musicians; and 10 percent say former political figures are most persuasive.

When it comes to how other celebrities rank in the category of least persuasive, almost half of respondents ages 35-44 say they feel former political figures are least persuasive, compared to one-third of those ages 18-34. Almost half of all respondents ages 55+ say business leaders are most persuasive, compared to only 28 percent of 18-34-year-olds. Twenty-three percent of 18-34-year-olds say television or movie stars are most persuasive, while only 15 percent of those 55+ feel the same way.

Almost one-quarter of all respondents say television or movie stars are least persuasive, while 14 percent and 13 percent say business leaders and athletes are least persuasive, respectively. Eleven percent say singers or musicians are least persuasive. For more information visit www.harrisinteractive.com.

Five Guys indexed as No. 1 QSR

Chik-fil-A and McDonald's garnered the highest number of votes for favorite quick-service restaurant (QSR) in a 2009 survey, but not all chains are created equal. While McDonald's has almost 14,000 locations in North America, Chik-fil-A has one-tenth that number, and Five Guys Burgers and Fries has just 3 percent of the McDonald's chain reach.

Since consumers are likely to vote for restaurants they are familiar with, Louisville, Colo., insights company Market Force wanted to see which chains would win out when the number of restaurants was also considered. So while survey respondents selected Chik-fil-A and McDonald's as their single favorite QSRs and both received the highest number of votes from consumers across the country (11 percent of the total for each), once the number of restaurants was taken into account, Five Guys and Chik-fil-A were selected as the No. 1 and No. 2 favorites. Five Guys emerged on top of the list with 14.4 percent, followed by Chik-fil-A in second with 12.5 percent. Chipotle and Panera Bread were third and fourth, respectively, with 7.7 percent and 7.3 percent.

When the respondents were asked to score these same restaurant chains for characteristics they appreciate most, Chik-fil-A scored highest in three out of nine categories: friendliness, cleanliness and accommodating children. Five Guys tied Chipotle for highest in quality of food and ranked second in friendliness and cleanliness.

When asked to predict their spending habits with QSRs in the first three months of 2010, slightly more than half of those surveyed said they expected to eat out about the same amount, and an additional 5 percent said they expected to eat out more at QSRs during the first quarter. Forty-four percent said they planned to cut back their patronage at fast-food restaurants. For more information visit www.marketforce.com.

30 hours a week, kids watch TV like it's their job

American children ages 2-11 are watching more television than they have in years, and the majority of viewing is done watching live TV. TV viewing among kids is at an eight-year high, according to data from New York researcher The Nielsen Company. Kids ages 2-5 spend more than 32 hours a week on average in front of a TV screen, while the 6-11-year-olds spend about 28 hours per week watching TV, due in part to attending school for longer hours.

While 97 percent of kids' viewing is through live TV, younger kids spend more time than the older group viewing via DVR, DVD and, to a lesser extent, VCR. Four percent of kids ages 2-5 watch via those devices on average across total day, compared to 2.3 percent for those ages 6-11. One more thing younger kids do more than those in the older age group is watch more commercials. Young kids also watch commercials in playback mode more than older kids and adults, as well as watch their favorite shows over and over on DVD, VOD and DVR.

Older kids may not use the DVR, DVD and VCR as much as the very young, but they spend twice as much time playing video games - 2 hours and 23 minutes a week compared to 1 hour and 12 minutes for those ages 2-5. Internet usage among older kids is also significantly higher, as nearly half the 6-11-year-olds spent time on the Internet in August 2009 versus 20 percent of 2-5-year-olds. For more information visit www.nielsen.com.

Restaurant-goers welcome all-day breakfast options

Consumers find breakfast fare comforting and many, especially women, wish they could eat it at any time of the day. Nearly half of consumers (46 percent) say they would like to see full-service restaurants offer breakfast throughout the day, according to a survey from Chicago consultancy Technomic. About a third of consumers would like breakfast offered all day in limited-service restaurants. In both cases, females were significantly more interested in breakfast items for lunch or dinner than were males.

"Operators looking to expand breakfast into other dayparts should be mindful of their customer base and develop new offerings accordingly," says Darren Tristano, executive vice president at Technomic. "Understanding the general flavor, ingredient and preparation preferences held by female consumers can help operators and suppliers introduce the most appealing breakfast options beyond morning hours for these guests."

Other interesting findings include: one out of four consumers often treat themselves to a large, traditional breakfast on the weekend; 43 percent say they visit their preferred restaurant for weekend breakfasts because the food tastes really good, while weekday breakfast visits are driven by inexpensive offerings (45 percent) and convenience of location (38 percent); and 63 percent say they expect their breakfast purchases at restaurants and convenience stores to remain about the same in the coming year.

Compared to the 2007 survey, breakfast has increased in popularity: 77 percent of consumers in 2009 purchase breakfast sandwiches sometimes or often during weekdays, compared to 73 percent in 2007, and breakfast sandwiches fared even better on weekends, increasing from 61 percent in 2007 to 70 percent in 2009; 34 percent prefer premium coffee as compared to 29 percent in 2007; 35 percent say they would like fast-food establishments to offer more healthy options, down from 43 percent in 2007; and leading fast-casual restaurant chains are adding new entrees and side items to their breakfast menus faster than any other restaurant subsegment. For more information visit www.technomic.com.

Media pushing phantom organic 'trend'?

As more traditional retailers expand their selection of organic food and beauty products, and as the media continues to focus more attention on this so-called emerging trend, there has been no growth in the number of U.S. consumers that purchase these products, according to a study from Tabs Group, a Shelton, Conn., research company. Organic food and beauty products continue to be niche products that have yet to penetrate a mass audience. Identical to 2008, only 38 percent of adults claim to have purchased anything from the major organic categories in the last six months.

Organic fresh fruit had the highest purchase incidence at 26 percent, with organic fresh vegetables close behind at 25 percent. Organic dairy products (eggs and milk) were cited for purchase by 17 percent and 16 percent of U.S. adults, respectively. Frozen organic products (vegetables, fruit and ice cream) had low purchase levels at 5-7 percent. Purchase levels for organic beauty care products also had very low mainstream acceptance, with stated purchase for organic skin care at 6 percent and organic hair care and cosmetics at 4 percent. There was no meaningful change in the household penetration of any of these categories compared to the 2008 study. By contrast, non-organic products for all of the above categories have household penetration levels of well above 70 percent.

The study found that traditional supermarkets were the preferred outlets for these products compared to natural food stores by a margin of 39 percent to 27 percent. However, while there were 50 percent more organic shoppers at traditional outlets than natural food outlets, there are 20-30 times more of these outlets. For more information visit www.tabsgroup.com.

will include time-sensitive data, such as the expected due date of pregnant women and the age of children in the household. At sign-up, panelists will confirm their willingness to participate in research via Webcam and mobile phone to include services such as EasyMobile, EasyVideo and EasyQual via Word of Mum. For more information visit www.easyinsites.com.

Index aims to rank WOM-recommended products and brands

Chicago marketing agency Zócalo Group and M/A/R/C Research, Irving, Texas, have launched the Recommendation Index, a tool intended to identify what products are being most recommended. The index measures both online and offline recommendations and takes into account how often people recommend individual brands, as well as how each brand compares with an overall category. In addition to providing an overall ranking of both positively- and negatively-recommended brands, it is also designed to create a score that marketers can use to compare against other brands in the same category. The first report generated from the index explores casual-dining restaurant recommendations. California Pizza Kitchen, Texas Roadhouse and Outback Steakhouse are the most-recommended casual-dining restaurants by U.S. consumers. For more information visit www.marcresearch.com.

Ipsos looks at gaming industry in 3-D

San Francisco research company Ipsos MediaCT has introduced a research practice focused on the needs of game developers, marketers and console manufacturers. The gaming practice is designed to provide life cycle support to gaming companies and focus on the three business dimensions of gamer understanding, game development and game marketing. The new tools to support the practice include market segmentation initiatives; co-creation tools with Ipsos InnoCreation; qualitative concept development using Ipsos GameStorm Ideation or GamerLink Workshops; concept screening, database development and volumetric forecasting; advertising research; loyalty and satisfaction programs; and ad hoc/custom approaches. For more information visit www.ipsosmediact.com.

New tool promises QuickVu of panelist insight

QualVu, a Golden, Colo., research company, has released QuickVu, a solution designed to provide access to Webcam-enabled panels for face-to-face qualitative insights. QuickVu clients must first select a Webcam-enabled panel, either creating their own private group or accessing one of QualVu's. Then, clients can access their panel(s) remotely at any time with assignments for panel members, delivered online. Panel participants log in to view pre-recorded video questions and then use Webcams to record their insights. QuickVu clients can also view video responses online at any time during data collection. Clients receive a VideoReport with highlight reels within three days. For more information visit www.qualvu.com.

Geoscape to measure multicultural European markets

Geoscape, a Miami market intelligence company, has debuted a product to examine multicultural consumer behavior for mainstream European markets. The Geoscape Intelligence System (GIS) Europe is an online platform intended to aid in marketing, media, distribution and strategic planning. Highlights of the GIS Europe include: detailed geodemographic, retail and consumer data for 40+ European countries; target location and group profiles; market potential measurement from country level down to neighborhood level; color-coded maps displaying roads, land mass, terrain and satellite views; multidimensional database for detailed reports; ROI analytics; and worldwide access via standard Internet browsers. For more information visit www.geoscape.com.

IRI updates platform with digital media solutions

Chicago research company Information Resources Inc. (IRI) has expanded its consumer and shopper insights platforms with a series of digital media solutions that integrate IRI's core consumer network (panel) purchase data, predictive modeling techniques and analytics with online research and advertising capabilities. The digital media solutions are designed to allow consumer packaged-goods, retail and health care companies to identify high-potential consumers online to target their digital media campaigns and evaluate the actual sales impact of those programs.

In a typical campaign scenario, IRI will work with customers to identify consumer and shopper segments by category/brand purchasing, retailer-specific shopping behavior, demographics and attitudes/behaviors. IRI partners and advertising agencies will then serve ads based on the customer's media strategy and plan to reach these specific target segments. IRI will track consumer buying behavior through offline sales data using its panel and analyze the sales impact of households exposed to the ad versus those not exposed to deliver an ROI success metric calculated for the specific campaign. For more information visit http://us.infores.com.

Briefly

San Francisco research company Peanut Labs has launched a gamers sample, consisting of 194,000+ U.S. gamers who play console, PC, handheld and online games. Gamers are recruited through social media channels. For more information visit www.peanutlabs.com.

New York researcher Dynamic Logic has launched AdIndex Connects with IRI, a solution powered by Chicago research company Information Resources Inc. (IRI). The offering is part of DLConnects and is designed to answer questions surrounding campaign effectiveness. The solution is built on the foundation of Dynamic Logic's AdIndex. For more information visit www.dynamiclogic.com.

Saskatoon, Saskatchewan, research company Itracks, has released version 1.5 of Populis, the company's market research online community (MROC) offering. The release includes functionality developed to increase member participation, a new reporting utility and a module designed to allow community managers to communicate with members via SMS. Itracks has also integrated its online qualitative, online quantitative and concept-testing tools with its MROC platform and added a points system that allows managers to track member activities. For more information visit www.itracks.com.

Medimix International, a Miami research company, has launched a platform for life-sciences companies to monitor online mentions of their brands and products in the social networking arena, dubbed Scanbuzz. Scanbuzz aims to discover, listen and manage feedback and develop relationships with social network users. Scanbuzz tracks the top-200 pharmaceutical products and 100 corporate brands in various therapeutic areas. The offering is available through a monthly subscription fee, based on the number of simultaneous users and the number of brands tracked. For more information visit www.medimix.net.

The Center for Marketing Research at the University of Massachusetts Dartmouth has released a study on the usage of social media in fast-growing corporations. The study revisits the Center's study of Inc. 500 companies' social media usage for the third consecutive year and compares adoption of social media from 2007-2009. Respondents are questioned about their familiarity with six social media tools and about their usage, level of success and intention to adopt the social media technologies they were not currently using. For more information visit www.umassd.edu.

London research company Experian has launched a German version of Experian Mosaic, the company's panel profiling and segmentation tool. The German version identifies 10 main lifestyle groups in Germany and is intended to provide an understanding of Germany's aging population, recent changes in household composition, the growth in ethnic diversity and the impact of the Internet on society. For more information visit www.smrb.com.

Dallas research company Toluna has released Toluna QuickSurveys in North America. QuickSurveys is an online self-service tool designed to enable organizations to create their own survey of up to five questions, launch it live to Toluna's online panel of community consumer and business professionals and receive responses quickly. For more information visit www.toluna.com.

Rochester, N.Y., research company Harris Interactive has launched Advanced Strategy Lab (ASL) in Europe and Asia. ASL is a qualitative research technology that aims to provide simultaneous, anonymous input from up to 24 participants from any location. Using dedicated facilities, mobile and Web-based labs, ASL is intended to facilitate brainstorming, idea generation and solution development through networked computers in a moderated group setting. For more information visit www.harrisinteractive.com.

Research Panel Asia Inc., Tokyo, has added a voting feature to its online panel service in China. The feature includes a point incentive designed to maintain high activity rates. For more information visit www.researchpanelasia.com.

Mediamark Research and Intelligence has begun beta testing a syndicated product designed to improve the quality of magazine data for marketing mix modeling, which uses sales and marketing information to determine the impact of media allocation and promotional tactics on sales. The software is expected to hit the marketplace in the first quarter of 2010. For more information visit www.mediamark.com.

OTX, a Los Angeles research company, has released its Silverlight study, which showcases how OTX's sample technology OTXCortex examines and routes users to a relevant range of surveys in its system while also noting what types of software programs users have installed on their computers. The study analyzes penetration of Microsoft's Silverlight multimedia software. For more information visit www.otxresearch.com.

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Mountain View, Calif., have entered into an audience research agreement in which Google will integrate TiVo television viewing data into its measurement of audiences for ads sold through the Google TV Ads platform. Financial terms of the deal were not disclosed.

Montreal research company **Metro Inc.** has partnered with London research company **dunnhumby** to create **dunnhumby Canada**, a joint venture focused on customer satisfaction.

Awards/rankings

Research Magazine, London, announced the winners of its Research Magazine Awards 2009: **Flamingo**, Best Agency; **Razor Research**, Best New Agency; **Starcom MediaVest Group**, Research Breakthrough; **Hall and Partners Europe**, Best Place to Work in Research; **New Look** and **eDigital-Research**, Business Transformation.

The **Ipsos** research team in Cincinnati was selected by the **U.S. Commerce Association**, Washington, D.C., as the recipient of 2009 Best of Cincinnati Award in the Marketing Program Services category.

The **University of Georgia**, Athens, has been ranked No. 1 in advertising research by the *International Journal of Advertising*, Oxfordshire, U.K., based on the number of articles published in top advertising journals.

The **Qualitative Research Consultants Association** (QRCA), St. Paul, Minn., selected **Ngaia Calder** of Auckland, New Zealand, to receive QRCA's 2009 Global Outreach Scholarship.

New accounts/projects

Natural Marketing Institute (NMI), a Harleysville, Pa., research company, and **Mediamark Research and Intelligence** (MRI), New York, have integrated NMI's Lifestyles of Health and Sustainability (LOHAS) consumer segmentation model with MRI's Survey of the American Consumer database to evaluate the sustainability marketplace. NMI has identified five LOHAS segments, which will be available to MRI.

Columbia, Md., research company **Arbitron Inc.** has accelerated a scheduled increase in its diary market cell-phone-only (CPO) household sample target, aiming to raise the proportion of its diary sample coming from CPO households to an average of 15 percent across the U.S. by spring 2010.

Additionally, Arbitron has partnered with research companies **comScore Inc.**, Reston, Va., and **Omniture**, Orem, Utah, to provide cross-platform audience measurement for the Vancouver 2010 Olympic Winter Games on NBC. The three firms plan to track NBC's total Olympic coverage reach across its broadcast, cable and online platforms. NBC expects to have access to day-after-next results.

Finally, Arbitron and radio networks **Dial-Global**, **Premiere Radio Networks** and **Westwood One** have agreed to collaborate on an initiative intended to improve the analytical methods used by advertisers to evaluate the tangible impact of radio advertising on product sales.

Christian Research, Swindon, U.K., has chosen Cologne, Germany, research company **Globalpark**'s software platform to power its Faith Journey project, an initiative that aims to record U.K. faith journeys.

Chicago research company **UXalliance** has added **SSB BART Group**, a Washington, D.C., IT company, and **Bentley University**, Waltham, Mass., to its global research network. SSB BART Group is the network's first corporate member.

EasyInsites, a Surrey, U.K., research company, has been selected to build and maintain U.K. network **GMTV**'s research panel, ViewBack. EasyInsites will use its EasyMobile product to allow viewers to text a term to a free mobile number shown during a program. Once the text is received and e-mail address provided, online registration will occur. ViewBack will also provide members with direct incentives via PayPal and be open to other researchers through the EasyExchange (also known as the Cint Panel Exchange).

TNS Media, a New York research company, renewed its five-year partnership with **British Sky Broadcasting**, Middlesex, U.K., for the provision of SkyView, its audience measurement panel.

Separately, **TNS Telegal**, a Tel-Aviv, Israel, research company, has renewed its contract to continue operating the national Israeli Television Audience Measurement service, awarded by the **Israeli Audience Research Board**, also of Tel-Aviv.

New York researcher **The Nielsen Company** has begun measuring television viewing in Puerto Rico. The first clients for the ratings service include WKAQ-TV (Telemundo); WLII-TV (Univision); and WAPA-TV (independent).

New companies/new divisions/ relocations/expansions

Cologne, Germany, research company **Globalpark** has relocated its New York office to 299 Broadway, 19th Floor, New York.

Paul Lubin has opened **Lubin Research LLC**, with offices in New Rochelle, N.Y., and Delray Beach, Fla.

Rotterdam, the Netherlands, research company **Skim** has opened a London office.

Acropolis Research Suites and Services LLP has opened its doors in Bangalore, India. Acropolis is a focus group facility that features three themed group discussion rooms, a test kitchen and food lounge. The firm is online at www.acropolisresearch.com.

Stockholm, Sweden, research company **Cint** has moved its sales headquarters to its London location. Richard Thornton has been named global sales director in London.

Research company **Next-Generation Marketing Insights** has opened in Charlotte, N.C., specializing in Web analytics, predictive modeling and social network data mining. The firm is online at www.nextgenmi.com.

2010

Marketing Research

Software Directory >>>

The 2010 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 58
The software cross-reference tables begin on page 72

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 x210
soave@adrsoft.com
www.advancedboca.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
Software:
Arthur
M-Link
Q-Leap
QueryWeb
Sp-Link
WinCross
WinCross Executive
WinLink
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Searching for support? TAG, we're it! Offering software and services from data collection through analysis. WinQuery® - CATI/CAPI/Web interviewing software featuring easy questionnaire set-up, sample management and quota control. 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. WinCross Executive® - tabulation and reporting software with an easy point-and-click interface. QueryWeb Designer® - for Web-hosted interviewing with online real-time reports.
(See advertisement on p. 59)

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

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 p. 63)

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3011 ZP Rotterdam
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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. 61)

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www.askia.com
John Rousay
Software:
askiaanalyse
askiadesign
askiaface
askiafacemobile
askiasurf
askiavista
askiavoice
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Whether you're considering software for questionnaire design, CATI, CAPI, online surveys or statistical analysis, ASKIA is the proven choice. Established in 1994 and with offices in London, Brussels, New York and Paris, ASKIA are gaining an enviable reputation as much for their support as for the quality of their products.
(See advertisement on p. 58)

ATP Canada Software and Services Ltd.
Newmarket, ON
Canada
Ph. 905-868-8742
sales@atpcan.com
www.atpcan.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!

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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

BayaSoft programs and hosts online surveys exclusively for market research companies. We focus on best-of-breed technology for online data collection - programming complex, custom projects including conjoint, max-diff, Kano, diary studies, advanced logic or graphic/multimedia needs, Flash surveys and multiple languages. All of BayaSoft's programming and hosting takes place in our Leominster, Mass., offices. We service pharma/health care, IT, financial, consumer, B2B and international research company clients, offering them the confidence and flexibility to execute their research vision online.

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Minneapolis, MN
Ph. 612-924-9193 x521 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
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www.cfmc.com
Gene Filipi, Dir. of Business Dev.
Software:
Mentor
Survent
webCATI
WebSurvent

CfMC-U.K.
Research Software
Cambridge
United Kingdom
Ph. 44-12-2336-4836
shughes@cfmc.co.uk
www.cfmc.com/
Software:
Mentor
Survent
webCATI
webSurvent

Checkbox Survey Solutions, Inc
Cambridge, MA
Ph. 617-715-9605 or 866-430-8274
info@prezzatech.com
www.prezzatech.com
Software:
Checkbox Mobile Survey
Checkbox Survey

Cint USA
Alpharetta, GA
Ph. 347-754-0712
contact-USA@cint.com
www.cint.com/cpx
Richard Avery, Sr. Acct. Executive US East
Branch offices:
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.

Clipstream™ Survey
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Canada
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quirks@clipstream.com
www.surveyclip.com
Ali Saedi, Vice President
Software:
Clipstream™ Video MR

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

Confirmit everywhere

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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)

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75017 Paris
France
Ph. 33-1-56-21-21-21
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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 10.0)

digivey™

Creoso Corporation
Phoenix, AZ
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info1@digivey.com
www.digivey.com
Elisabeth Scherer, V.P. Marketing
Software:
Digivey Survey Suite™

The Digivey Survey Software from the touch-screen survey experts at CREOSO is a proven survey tool for self-administered and interviewer-assisted interactive, paperless surveys. The versatile and feature-rich Digivey software supports sophisticated multilingual survey questionnaire design, quizzes, assessments, branching, skipping, piping, randomization, mixed-mode survey data collection and more. Together with the Digivey survey software handheld survey devices, touch-screen survey stations and survey kiosks are available. A survey equipment rental program complements the offerings.

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sallyhpr@earthlink.net
www.crusader-services.com
Sally Hooper, Owner
Software:
InterQue

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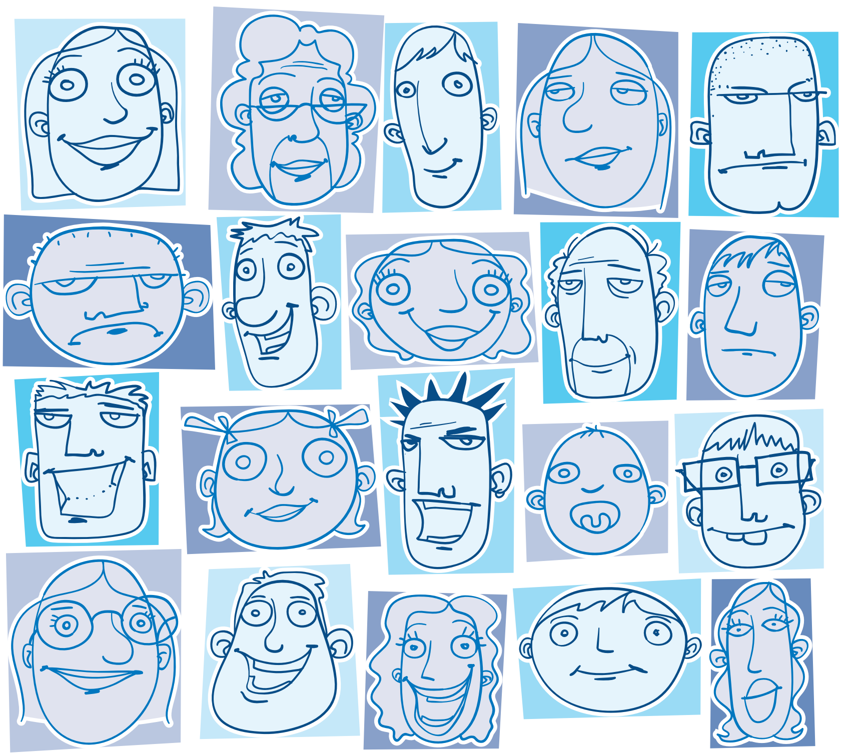
Ph. 801-966-0999 or 888-966-0999
cyberman@xmission.com
www.cneticsolutions.com
R. Kent Francis, President
Software:
The Survey

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



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.
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 crosstabulation, 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. 17)

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
Batavia, IL
Ph. 888-823-8227 or 630-879-8227
info@e-tabs.com
www.e-tabs.com
Benjamin Rietti
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E-Tabs Enterprise
E-Tabs Lite Reader
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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 has provided software and services to the market research industry since 1993, with offices in Chicago and London, and has in excess of 15,000 users worldwide. Keep your edge and automate today with E-Tabs' Award winning software.
(See advertisement on p. 67)

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Holland, MI
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Software:
Reply

Fleetwood manufactures portable interactive research tools. Reply® group response systems are used in focus groups and large-scale audience surveys to instantly gather data and determine audience perceptions. Reply® systems consist of cordless, hand-held keypads and a receiving unit. The keypads transmit responses to the receiving unit via radio frequency. These responses are then sent to your PC, where the data can be viewed and manipulated live or stored for subsequent statistical analysis. Available for purchase and rental.

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Software:
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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, security 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. 33)

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.
New York, NY
Ph. 212-537-5949
info@frameworkUSA.com
www.frameworkUSA.com
Liza Wong
Software:
QPSMR CATI
QPSMR Input
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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.

GENESYS Sampling Systems
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Alan Lambert, Vice President
Software:
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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. Zip code, demographic, congressional district, census tract and PRIZM clusters modules available.
(See advertisement on p. 63)

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

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

Globalpark offers panel, community and feedback management solutions that drive customer loyalty, product innovation, and marketing reach. We work with customer insights and marketing teams at companies like Citi, Daimler and Nintendo, to ensure the voice of the customer is incorporated into daily decisions. We also work with all the top market research agencies, like GfK and TNS, providing the technology that serves as the backbone of their businesses.
(See advertisement on p. 35)

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
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Software:
MAIA Market Attitude & Intent Analysis

Hexworx Computer Services P/L
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Australia
Ph. 61-8-9450-4814
admin@hexworx.com
www.hexworx.com
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Software:
TestKit

Hostedware
Irvine, CA
Ph. 949-585-1500 x1507 or 800-211-6967
lisa.price@hostedware.com
www.hostedware.com
Software:
Hosted Poll
Hosted Survey
Hosted Survey Lite
Hosted Test

Information Tools Ltd.
Highland Park, IL
Ph. 847-748-8196
mail@infotools.com
www.infotools.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

InsideHeads, LLC
Online Focus Groups
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Virgin Islands (U.S.)
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info@insideheads.com
www.insideheads.com
Jennifer Dale
Software:
My Virtual Focus Facility

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

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1016 DG Amsterdam
Netherlands
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itsales@interviewtechnology.com
www.interviewtechnology.com
Andre Smit
Software:
IT CATI/CAPI/Web

Itracks
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Canada
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info@itracks.com
www.itracks.com
Software:
Bulletin Board Focus Groups
Custom 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
sales@kinesissurvey.com
www.kinesissurvey.com
Software:
Kinesis Survey

Kinesis Survey Technologies™ provides multimode (Web/wireless) survey and panel management solutions based with the most intuitive user interface in the industry. The Kinesis Community Portal (Web and wireless versions available) offers panelists a rich and engaging user experience. Solutions include robust, real-time reporting and a feature set rivaling anything in the industry today.
(See advertisement on p. 65)

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

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Jeff Jebson, Director of Sales & Marketing
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Steve Schulz, President
Software:
Market-i

Marketing and Research Data Consultants
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United Kingdom
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info@mrdcsoftware.com
www.mrdcsoftware.com
Phil Hearn
Software:
MRDCL
OnTraq
Report Direct

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Software:
Internet Survey Machine
Survey Said Enterprise Edition

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www.m-s-g.com
Alan Lambert, Vice President
Software:
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 p. 63)

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.
Cumming, GA
Ph. 678-455-3161
microtab@aol.com
www.microtab.com
Larry Hills, Managing Director
Software:
Microtab Version 7 - Prof with SPSS Add-on Module
Microtab Version 7 - Professional Edition
Microtab Version 7 - Standard Edition

Modern Survey, Inc.
Minneapolis, MN
Ph. 612-399-3837 or 866-876-8242
ask@modernsurvey.com
www.modernsurvey.com
Software:
m/360

Moskowitz Jacobs Inc.
White Plains, NY
Ph. 914-421-7456
bkrieger@mji-designlab.com
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FASTAB Ad Hoc Tabulation DATAN, Inc., p. 61	●					GUI	32,000	Unltd	●	●	●						Lease	$
Forecast Pro Business Forecast Systems, p. 60	●					GUI	10	1	●		●						Buy	$
Forecast Pro Unlimited Business Forecast Systems, p. 60	●					Both	Unltd	Unltd	●	●	●		●		●		Buy	$$$$
Forecast Pro XE Business Forecast Systems, p. 60	●					GUI	100	1	●	●	●		●		●		Buy	$$$
GeoSight Sammamish Data Systems, Inc., p. 69	●					GUI	Unltd	Unltd	●	●	●						Buy	$

$ = $0-$500 $$ = $501-$1,500 $$$ = $1,501-$2,500 $$$$ = $2,500+

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
Goldminer® Statistical Innovations Inc., p. 69	●					GUI				●	●		●	●		●	Buy	$$
HARMONI Information Tools Ltd., p. 64	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Buy	$$$
Hosted Survey Hostedware, p. 64					●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	
IdeaMap®.Net Moskowitz Jacobs Inc., p. 65					●	GUI					●	●						
ImagEntry Viking Software Solutions, p. 70	●		●	●		GUI	32,000	32,000									Buy	$$
iMARK Online Nielsen Claritas, p. 66					●	GUI			●		●	●					Lease	$$$$
Impact! Analysis Pattern Discovery, Inc., p. 66																	Lease	
Internet Survey Machine Marketing Masters, p. 64	●	●	●	●	●	GUI	32,000	Unltd									Buy	$$$
Ioxphere Xorbix Technologies, Inc., p. 71	●	●			●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$
iXPRESS Nielsen Claritas, p. 66	●					GUI			●		●	●					Lease	$$$
Kereba.com SyClick, p. 70					●	GUI			●		●	●					Lease	$$$
KMRQuest KMR Group, p. 64	●												●				Lease	
Latent Gold® Statistical Innovations Inc., p. 69	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Buy	$$
Latent Gold® Choice Statistical Innovations Inc., p. 69	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Lease	$$$
LogXact Cytel Inc., p. 61																	Buy	$
m/360 Modern Survey, Inc., p. 65																		
MarketSight® MarketSight LLC, p. 65	●				●	GUI	10,000	Unltd	●	●	●	●	●	●	●	●	Either	$$
MARS Salford Systems, p. 68	●		●	●			8,192		●	●	●						Buy	$$$$
Mentor CfMC Research Software & Service Bureau, p. 60	●		●	●		Syntax	Unltd	Unltd	●	●	●	●	●		●	●	Lease	
Mentor CfMC-U.K., p. 60	●		●	●		Syntax	1 million+	Unltd	●	●		●	●	●	●	●	Lease	
MERLIN Tabulation System DATAN, Inc., p. 61	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$$
MERLINPlus (plus menus) DATAN, Inc., p. 61	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$
Microtab Version 7 - Prof with SPSS Add-on Module Microtab, Inc., p. 65	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$$
Microtab Version 7 - Professional Edition Microtab, Inc., p. 65	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$$
Microtab Version 7 - Standard Edition Microtab, Inc., p. 65	●					GUI	Unltd	Unltd	●			●					Buy	$$
MktSIM SPRING SYSTEMS, p. 69	●										●							

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
MM4XL 7.0 MarketingStat, p. 64	●					GUI	200	Unltd	●	●	●	●	●	●	●	●	Buy	$$
MRDCL Marketing & Research Data Consultants, p. 64	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$$$
mTAB Research Analysis System PAI-Productive Access, Inc., p. 66	●				●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	
MyStat 12 for students Systat Software, p. 70						GUI												
NCSS NCSS, p. 65	●					GUI	1,000	Unltd	●		●		●	●	●	●	Buy	$
NIPO DIANA NIPO Software, p. 66	●				●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Lease	$$$
OnTraq Marketing & Research Data Consultants, p. 64	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$
Opinionmeter's Survey Manager Opinionmeter International, p. 66	●					GUI			●	●	●	●					Either	$$
Panel Portal whole solution Toluna USA, p. 70					●	GUI	1,000	1,000	●	●	●		●		●	●		$$$$
PEER Forecaster Delphus, Inc., p. 62	●					GUI			●					●	●		Either	$
PEER Planner for Windows Delphus, Inc., p. 62	●					GUI			●	●	●	●	●	●	●	●	Either	$$$$
Postal Carrier Route Polygons Sammamish Data Systems, Inc., p. 69	●						Unltd	Unltd	●	●	●						Buy	$
PrimeLocation Nielsen Claritas, p. 66	●					GUI			●	●	●	●					Lease	$$$$
P-STAT P-STAT, Inc., p. 68	●		●	●		Both	250,000	Unltd	●	●	●	●	●	●	●		Buy	$$
Q Basic Q Market Research Software, p. 68	●					GUI	Unltd	Unltd	●	●	●		●	●	●	●	Lease	$$
Q Professional Q Market Research Software, p. 68	●					Both	Unltd	Unltd	●	●	●		●	●	●	●	Lease	$$
Q Reader Q Market Research Software, p. 68	●					GUI	Unltd	Unltd	●	●	●		●	●	●	●	Lease	$
QDA Data Analysis Software Tragon, p. 70	●					GUI	100				●			●			Buy	$$$$
QPSMR CATI Framework Data Services Inc., p. 62	●					Both	30,000	30,000	●	●			●	●	●	●	Lease	$$$$
QPSMR CATI QPSMR Ltd., p. 68	●					Both	30,000	30,000	●	●		●	●	●	●	●	Lease	$$$$
QPSMR Insight Framework Data Services Inc., p. 62	●					Both	30,000	30,000	●	●			●	●	●	●	Lease	$$
QPSMR Insight QPSMR Ltd., p. 68	●					Both	30,000	30,000	●	●		●	●	●	●	●	Lease	$$
QPSMR Reflect Framework Data Services Inc., p. 62	●					Both	30,000	30,000	●	●		●	●	●	●	●		
QPSMR Reflect QPSMR Ltd., p. 68	●					Both	30,000	30,000	●	●		●	●	●	●	●		
QPSMR Solo Framework Data Services Inc., p. 62	●					Both	30,000	30,000	●	●		●	●	●	●	●	Buy	$$
QPSMR Solo QPSMR Ltd., p. 68	●					Both	30,000	30,000	●	●		●	●	●	●		Buy	$$

$ = $0-$500 $$ = $501-$1,500 $$$ = $1,501-$2,500 $$$$ = $2,500+

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. 71	●			●		Syntax	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$$
QuestionPro QuestionPro.com, p. 68					●	GUI	Unltd	Unltd	●			●	●		●		Either	$$
QWRITERII for Windows Your Perceptions, Inc., p. 71	●					GUI	2,000	200			●						Lease	$
RandomForests Salford Systems, p. 68	●		●			Both	8,192		●	●	●						Buy	
Raosoft EZReport Raosoft, Inc., p. 68	●					Both	Unltd	Unltd	●	●	●		●	●	●	●	Buy	$
Raosoft SurveyWin Raosoft, Inc., p. 68	●					GUI	Unltd	Unltd	●	●			●	●	●	●	Buy	$
Rosetta Studio Rosetta Studio International, p. 68	●					GUI		Unltd			●						Either	$$$$
Sensus Web Sawtooth Technologies, Inc., p. 69	●					Both	Unltd	Unltd	●			●					Buy	
Si-CHAID® Statistical Innovations Inc., p. 69	●					GUI	Unltd	Unltd		●	●		●				Buy	$$
SmartForecasts® Smart Software, Inc., p. 69	●					GUI	Unltd		●	●	●	●	●	●	●	●	Either	$$$$
SNAP Professional Snap Surveys, Ltd., p. 69	●					GUI	Unltd	Unltd	●	●	●	●	●		●	●	Buy	$$$
SNAP Scanning Snap Surveys, Ltd., p. 69	●					GUI	Unltd	Unltd	●	●		●	●		●	●	Buy	$$$$
Snap Webhost Snap Surveys, Ltd., p. 69	●					GUI	Unltd	Unltd	●	●		●	●		●	●	Either	$$$$
STAT XP Web Voxco (Voxco Group), p. 71					●	Both	10,000	Unltd	●	●	●	●	●		●	●	Buy	$$$$
Stata StataCorp LP, p. 69	●	●	●	●		Both							●	●	●		Either	$$$
Statgraphics Centurion XVI StatPoint Technologies, Inc., p. 69	●	●	●	●	●	GUI	1,000		●	●	●	●	●	●	●	●	Either	$$
STATISTICA StatSoft, Inc., p. 69	●				●	Both	Var	Var	●	●	●		●	●	●	●	Buy	
StatPac Survey Software StatPac, Inc., p. 69	●					Syntax	2,000	Unltd	●	●	●	●	●	●	●	●	Buy	$$
STATS™ 2.0 Decision Analyst, Inc., p. 62	●					GUI				●			●		●	●		$
StatXact Cytel Inc., p. 61																	Buy	$$
StatXact Procs for SAS Users Cytel Inc., p. 61																	Buy	$$
StyleMap®.Net Moskowitz Jacobs Inc., p. 65					●	GUI					●	●						
Survey Explorer Version 6 Memphis International, p. 65	●					GUI	Unltd	Unltd	●	●			●					
Survey Said Enterprise Edition Marketing Masters, p. 64	●				●	GUI											Buy	
Survey Select Expert SurveyConnect, Inc., p. 69	●					GUI	Unltd	Unltd			●	●					Buy	$$
SurveyPro Apian Software, p. 58	●					GUI	3,000	3,000	●	●	●	●	●				Buy	$$$

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
Systat 12 Systat Software, p. 70						GUI			●	●	●		●	●	●	●	Buy	$$
TabRight RDA Group, p. 68	●								●	●	●				●		Buy	$$$
TestKit Hexworx Computer Services P/L, p. 64	●		●	●	●	Both	Unltd	Unltd	●	●	●	●			●	●	Buy	$
The Survey Cybernetic Solutions - The Survey Software, p. 61	●					GUI	1,000	32,000	●	●	●		●	●	●	●	Buy	$
The Survey System - CATI Creative Research Systems, p. 61	●					GUI	Unltd	1,000	●	●		●	●		●			$$$
The Survey System - PDA Creative Research Systems, p. 61	●						Unltd	na									Buy	$
The Survey System - Web Creative Research Systems, p. 61	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●		$$
The Survey System (Version 10.0) Creative Research Systems, p. 61	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●		$$
TPL Tables QQQ Software, Inc., p. 68	●		●	●		Both	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$
TreeNet Salford Systems, p. 68	●		●	●		Both	8,192		●	●	●						Buy	$$$$
Trial Map SPRING SYSTEMS, p. 69	●										●							
Turbo Spring-Stat SPRING SYSTEMS, p. 69	●										●		●	●	●	●		
UNCLE Professional The Uncle Group, Inc., p. 70	●					Both	65,534	9,999	●	●	●		●		●		Buy	$$$$
UNCLE Reports The Uncle Group, Inc., p. 70	●					GUI	9,999		●	●								$
UNCLE Standard The Uncle Group, Inc., p. 70	●					Both	65,534	9,999	●	●	●		●		●		Buy	$$$$
U-Tab™ Weeks Computing Services, p. 71	●					GUI	Unltd	Unltd	●	●	●	●	●	●	●		Buy	$
VDE Viking Software Solutions, p. 70	●		●	●		GUI	32,000	32,000									Either	$$
VDE+Images Viking Software Solutions, p. 70	●		●	●		GUI	32,000	32,000									Buy	$$
Vector Cobalt Sky Limited, p. 60					●	GUI	Unltd	Unltd	●	●	●	●				●	Lease	$$$$
Voxco Insight Publisher (V.I.P.) Voxco (Voxco Group), p. 71	●				●		Unltd	Unltd	●	●		●						
WinCATI Sawtooth Technologies, Inc., p. 69	●					Both	Unltd	Unltd	●			●					Buy	
WinCATI Mixed Mode Sawtooth Technologies, Inc., p. 69	●					Both	Unltd	Unltd	●			●					Buy	
WinCross The Analytical Group, Inc., p. 58	●					Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$$
WinCross Executive The Analytical Group, Inc., p. 58	●					GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$$
Zip + 2 Polygons Sammamish Data Systems, Inc., p. 69	●						Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$
Zip + 4 Centroids Sammamish Data Systems, Inc., p. 69	●						Unltd	Unltd	●	●	●						Buy	
Zip Code Polygons Sammamish Data Systems, Inc., p. 69	●						Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$

$ = $0-$500 $$ = $501-$1,500 $$$ = $1,501-$2,500 $$$$ = $2,500+

Integrated Interviewing Software

Software Title / Company/Listing page #	Operating System					Design Tool	Types of Data Collection								Features			Purchasing	
	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. 69	●				●	GUI	●	●	●	●	●			●	●	●	●		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 64	●	●	●	●	●	Both	●			●					●			Either	
Blaise Westat, p. 71	●					GUI	●	●	●	●								Buy	
CBC System Sawtooth Software, Inc., p. 69	●				●	GUI	●	●	●	●	●	●		●	●	●	●		
Checkbox Mobile Survey Checkbox Survey Solutions, Inc, p. 60	●					GUI				●				●					
Confirmit Confirmit, p. 61	●				●	GUI	●	●	●	●	●	●	●	●	●	●	●	Lease	
Custom Panel Building Itracks, p. 64					●	GUI			●	●				●	●	●	●		
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 69					●	GUI				●	●	●	●	●	●	●	●		
CVA System Sawtooth Software, Inc., p. 69	●					GUI	●	●	●			●		●	●	●	●		
Decipher Decipher, p. 62					●	GUI	●	●	●	●	●				●	●	●	Lease	
Dub InterViewer Nebu b.v., p. 66	●			●	●	GUI	●	●	●	●					●	●		Lease	
Eform Beach Tech Corporation, p. 60	●				●	Both			●	●	●		●	●	●	●	●	Either	
EFS Employee Globalpark Inc., p. 64					●	GUI	●		●			●						Lease	
EFS Leadership Globalpark Inc., p. 64					●	GUI	●			●		●						Lease	
EFS Panel Globalpark Inc., p. 64					●	Both				●		●	●		●	●		Lease	
EFS Survey Globalpark Inc., p. 64					●	GUI	●			●		●						Lease	
FocusVision FocusVision Worldwide, p. 62										●									
Hosted Survey Hostedware, p. 64					●	Both	●			●	●	●		●	●	●	●	Either	
IBM SPSS Data Collection Interviewer SPSS, an IBM Company, p. 69	●				●	Both	●	●	●	●	●	●	●	●					
IT CATI/CAPI/Web Interview Technology, p. 64	●				●	Both	●		●	●					●			Buy	$$$$
Itracks Online CATI Itracks, p. 64					●	Both			●	●				●	●	●	●		
Itracks Online Surveys Itracks, p. 64					●	Both				●				●	●	●	●		
Kereba.com SyClick, p. 70					●	GUI			●	●	●				●	●	●	Lease	$$$
MaxDiff/Web Sawtooth Software, Inc., p. 69	●				●	GUI	●	●	●	●	●	●							$$$
MM4XL 7.0 MarketingStat, p. 64	●					GUI									●	●	●	Buy	$$
Mobile Surveys Itracks, p. 64					●	Both				●	●			●	●	●	●		
Morae TechSmith Corporation, p. 70	●					GUI								●		●	●	Buy	
NIPO Fieldwork System NIPO Software, p. 66	●					Both	●	●	●	●	●	●		●	●	●	●	Lease	$$

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
Online Focus Groups Itracks, p. 64					●	GUI				●				●	●	●	●		
Opinionmeter's Survey Manager Opinionmeter International, p. 66	●					GUI	●			●	●	●	●		●	●	●	Either	$$
Pulse DNA Software Suite Pulse Group, p. 68	●			●	●	Both	●	●	●	●	●	●	●	●	●	●	●	Either	
QPSMR CATI Framework Data Services Inc., p. 62	●					Both	●	●	●		●	●		●	●	●		Lease	$$$$
QPSMR CATI QPSMR Ltd., p. 68	●					Both	●	●	●		●	●		●	●	●		Lease	$$$$
QPSMR Insight Framework Data Services Inc., p. 62	●					Both	●								●	●	●	Lease	$$
QPSMR Insight QPSMR Ltd., p. 68	●					Both	●				●	●		●	●	●		Lease	$$
Qualmetrix Itracks, p. 64					●	GUI				●					●		●		
QuestDesigner QuestMetrics, p. 68					●	GUI	●	●	●	●	●	●						Lease	$$$$
Raosoft EZSurvey Raosoft, Inc., p. 68	●				●	Both	●	●	●	●	●	●		●				Buy	$
Raosoft SurveyWin Raosoft, Inc., p. 68	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$
Results for Research 6.0 RONIN Corporation, p. 68	●				●	Both	●	●	●	●								Buy	
SNAP Professional Snap Surveys, Ltd., p. 69	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$$$
SSI Web Sawtooth Software, Inc., p. 69	●				●	Both	●	●	●	●	●	●		●	●	●	●		
StatPac Survey Software StatPac, Inc., p. 69	●					Syntax			●	●	●	●		●	●	●	●	Buy	$$
Survey Genie William Steinberg Consultants, Inc., p. 69	●					GUI				●	●	●		●	●	●	●	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 69	●					GUI		●		●	●	●		●	●	●	●	Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 64	●				●	GUI			●	●	●	●	●	●				Buy	
Survey Tools For Windows William Steinberg Consultants, Inc., p. 69	●					GUI		●		●	●	●		●	●	●	●	Buy	$$
SurveyPro Apian Software, p. 58	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$$$
The Survey Cybernetic Solutions - The Survey Software, p. 61	●					GUI				●	●	●		●	●	●	●	Buy	$
The Survey System - CATI Creative Research Systems, p. 61	●					GUI	●	●	●	●	●	●		●	●	●			$$$
The Survey System (Version 10.0) Creative Research Systems, p. 61	●					GUI	●	●	●	●	●	●	●	●	●	●	●		$$
Virtual Call Center Network Itracks, p. 64					●	GUI			●	●					●	●	●		
Voxco Command Center Voxco (Voxco Group), p. 71					●	GUI	●	●	●	●					●	●		Either	
webCATI CfMC-U.K., p. 60			●	●	●	Both	●		●						●			Lease	
webSurvent CfMC-U.K., p. 60			●	●	●	Both	●		●	●					●	●		Lease	
WinCATI Mixed Mode Sawtooth Technologies, Inc., p. 69	●					Both			●	●					●	●	●	Buy	

$ = $0-$500 $$ = $501-$1,500 $$$ = $1,501-$2,500 $$$$ = $2,500+

Paper-based/Scan Survey Software

Software Title Company/Listing page #	Operating System			Design Tool	Types of Data Collection					Features	Purchasing	
	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. 61	●		●	GUI	●	●	●	●	●	Yes	Lease	
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 69			●	GUI		●				Yes		
Eform Beach Tech Corporation, p. 60	●		●	Both		●	●			Yes	Either	
EFS Employee Globalpark Inc., p. 64			●	GUI	●						Lease	
EFS Leadership Globalpark Inc., p. 64			●	GUI	●						Lease	
EFS Panel Globalpark Inc., p. 64			●	Both	●						Lease	
EFS Survey Globalpark Inc., p. 64			●	GUI	●						Lease	
ExpertScan AutoData Systems, p. 60	●			GUI		●	●	●	●	Yes	Buy	$$$
FAQSS Optimum Solutions Corp., p. 66	●			GUI	●	●	●	●	●	Yes	Lease	$$$$
IBM SPSS Data Collection Paper SPSS, an IBM Company, p. 69	●			Both						Add-on		
IBM SPSS Data Collection Scan SPSS, an IBM Company, p. 69	●			Both	●	●	●	●	●	Add-on		
Inquisite Survey Inquisite Inc., p. 64	●		●	GUI		●				Yes	Either	$$$$
Opinionmeter's Survey Manager Opinionmeter International, p. 66	●			GUI		●				Yes	Either	$$
Pulse DNA Software Suite Pulse Group, p. 68	●	●	●	Both	●			●			Either	
Raosoft SurveyWin Raosoft, Inc., p. 68	●			GUI	●	●				Yes	Buy	$
ReadSoft Documents for Forms ReadSoft, Inc., p. 68	●			GUI	●	●	●	●	●	Add-on	Buy	$$$$
Remark Classic OMR Gravic, Inc. - Remark Products Group, p. 64	●			GUI		●	●	●		Yes	Buy	$
Remark Office OMR Gravic, Inc. - Remark Products Group, p. 64	●			GUI		●	●			Yes	Buy	$$
Scannable Office AutoData Systems, p. 60	●			GUI	●	●	●	●	●	No	Buy	$$$$
SNAP Professional Snap Surveys, Ltd., p. 69	●			GUI	●	●		●	●	Yes	Buy	$$$
SNAP Scanning Snap Surveys, Ltd., p. 69	●			GUI	●	●		●	●	Yes	Buy	$$$$
Survey Genie William Steinberg Consultants, Inc., p. 69	●			GUI						Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 69	●			GUI						Yes	Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 64	●		●	GUI	●	●				Yes	Buy	
Survey Select Expert SurveyConnect, Inc., p. 69	●			GUI						Yes	Buy	$$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 69	●			GUI						Yes	Buy	$$
SurveyPro Apian Software, p. 58	●			GUI		●	●			Yes	Buy	$$$
The Survey System (Version 10.0) Creative Research Systems, p. 61	●			GUI		●				Yes		$$

$ = $0-$500 $$ = $501-$1,500 $$$ = $1,501-$2,500 $$$$ = $2,500+

CAPI/CASI Software	Operating System					Platform				Design Tool	CAPI/CASI Features				Purchasing	
Software Title Company/Listing page #	Win	Mac	Unix	Linux	Web	Desktop	Handheld	Touchscreen	IVR	Graphic User Interface or Script	Audio	Still Images	Video	Tabulation & Analysis Tools	Buy or Lease	Price Range
Abase Advanced Data Research, Inc., p. 58	●					●	●	●		Both	●	●	●	Yes	Buy	$$$$
ACA System Sawtooth Software, Inc., p. 69	●				●	●	●			GUI	●	●	●	Yes		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 64	●	●	●	●	●	●	●			Both	●	●	●	Yes	Either	
ARCS® ARCS®, p. 58	●								●	GUI					Either	$$$$
askiaface ASKIA - Software for Surveys, p. 60	●					●				Both	●	●	●		Either	
askiafacemobile ASKIA - Software for Surveys, p. 60	●						●	●		Both	●	●	●		Either	
CBC System Sawtooth Software, Inc., p. 69	●				●	●	●			GUI	●	●	●	Yes		
Checkbox Mobile Survey Checkbox Survey Solutions, Inc, p. 60	●						●			GUI						
Clipstream™ Video MR Clipstream™ Survey, p. 60	●	●	●	●	●					GUI	●	●	●		Either	$
Confirmit Confirmit, p. 61	●				●	●		●	●	GUI	●	●	●	Yes	Lease	
Converso CAPI CONVERSOFT, p. 61	●					●	●	●		Both	●	●	●	Yes	Either	
Converso CASI CONVERSOFT, p. 61	●					●	●	●		Both	●	●	●		Either	
Converso Pocket/Mobile CONVERSOFT, p. 61	●						●	●		Both	●	●		Yes	Either	
CVA System Sawtooth Software, Inc., p. 69	●					●	●			GUI	●	●	●	Yes		
Digivey Survey Suite™ Creoso Corporation, p. 61	●					●	●	●		GUI	●	●	●	Yes	Either	$$
Dub InterViewer Nebu b.v., p. 66	●			●	●	●	●	●		GUI	●	●	●	Add-on	Lease	
Eform Beach Tech Corporation, p. 60	●				●	●			●	Both	●	●		Yes	Either	
EFS Employee Globalpark Inc., p. 64					●		●			GUI			●		Lease	
EFS Leadership Globalpark Inc., p. 64					●		●			GUI			●		Lease	
EFS Panel Globalpark Inc., p. 64					●		●			Both			●		Lease	
EFS Survey Globalpark Inc., p. 64					●		●			GUI			●		Lease	
Empathica Customer Experience Mgmt. System Empathica Inc., p. 62					●				●					Yes	Buy	$$$$
Entryware 6 Techneos Systems Inc., p. 70	●				●	●	●	●		Both	●	●	●	Add-on	Either	$$
ForSurveys Forall Systems, Inc., p. 62					●		●			GUI		●		No	Lease	$$
Hosted Survey Hostedware, p. 64					●		●	●		Both	●	●	●	Add-on	Either	
IBM SPSS Data Collection Interviewer SPSS, an IBM Company, p. 69	●				●	●	●	●		Both	●	●	●	Add-on		
Internet Survey Machine Marketing Masters, p. 64	●	●	●	●	●					GUI			●		Buy	$$$
IT CATI/CAPI/Web Interview Technology, p. 64	●				●					Both				Yes	Buy	$$$$
Kereba.com SyClick, p. 70					●					GUI	●	●	●		Lease	$$$
MaxDiff/Web Sawtooth Software, Inc., p. 69	●				●	●	●			GUI				Yes		$$$

CAPI/CASI Software	Operating System					Platform				Design Tool	CAPI/CASI Features				Purchasing	
Software Title Company/Listing page #	Win	Mac	Unix	Linux	Web	Desktop	Handheld	Touchscreen	IVR	Graphic User Interface or Script	Audio	Still Images	Video	Tabulation & Analysis Tools	Buy or Lease	Price Range
NIPO CAPI System NIPO Software, p. 66	●					●	●	●		Both	●	●	●	Add-on	Lease	$$$$
Opinionmeter's Survey Manager Opinionmeter International, p. 66	●						●	●		GUI	●	●	●	Yes	Either	$$
Panel Portal Whole Solution Toluna USA, p. 70					●	●	●			GUI	●	●	●	Yes		$$$$
PRO-T-S; GENESYS; ARCS IVR Marketing Systems Group, p. 64	●								●	GUI					Either	
QPSMR CATI Framework Data Services Inc., p. 62	●					●	●			Both	●	●	●	Yes	Lease	$$$$
QPSMR Input Framework Data Services Inc., p. 62	●					●				GUI		●		No		
QPSMR Insight Framework Data Services Inc., p. 62	●					●	●			Both		●	●		Lease	$$
QualAnywhere™ 20/20 Technology, p. 70							●			GUI				Yes	Lease	$$
Raosoft EZSurvey Raosoft, Inc., p. 68	●				●	●	●	●		Both	●	●	●	Yes	Buy	$
Raosoft InterForm Raosoft, Inc., p. 68	●				●	●				GUI	●	●	●	Yes	Buy	
Raosoft SurveyWin Raosoft, Inc., p. 68	●					●		●		GUI		●		Add-on	Buy	$
ReForm XT Anyware Mobile Solutions, p. 58					●		●		●	GUI	●	●		Yes		
Results for Research 6.0 RONIN Corporation, p. 68	●				●	●	●	●		Both	●	●	●	Yes	Buy	
SmartQ TeleSage, Inc., p. 70	●								●	GUI	●			Add-on	Buy	$$$$
Snap Mobile (PDA, Kiosk, Tablet PC) Snap Surveys, Ltd., p. 69	●					●	●	●		GUI	●	●	●	No	Buy	$$
SNAP Professional Snap Surveys, Ltd., p. 69	●					●	●	●		GUI	●	●	●	Yes	Buy	$$$
SODA Techneos Systems Inc., p. 70	●				●		●	●		Both				Add-on	Either	
SSI Web Sawtooth Software, Inc., p. 69	●				●	●	●			Both	●	●	●	Yes		
Survent CfMC Research Software and Service Bureau, p. 60	●		●	●	●	●				Syntax	●			Yes	Lease	
Survey Genie / Survey Genie - Gold William Steinberg Consultants, Inc., p. 69	●					●				GUI				Yes	Buy	$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 69	●					●				GUI				Yes	Buy	$$
SurveyPro Apian Software, p. 58	●					●		●		GUI		●		Yes	Buy	$$$
The Survey System - CATI Creative Research Systems, p. 61	●					●	●			GUI	●	●	●	Yes		$$$
The Survey System - PDA Creative Research Systems, p. 61	●						●						●	No	Buy	$
The Survey System - Web Creative Research Systems, p. 61	●						●			GUI						$$
The Survey System (Version 10.0) Creative Research Systems, p. 61	●					●	●	●		GUI	●	●	●	Yes		$$
TPL Tables QQQ Software, Inc., p. 68	●		●	●						Both			●		Buy	$$
Voxco Command Center Voxco (Voxco Group), p. 71					●	●			●	GUI	●	●	●	Yes	Either	
webCATI CfMC-U.K., p. 60			●	●	●	●	●			Both	●	●	●	Yes	Lease	
WinQuery The Analytical Group, Inc., p. 58	●					●		●		Both	●	●	●	Yes	Buy	$

CATI Software

Software Title Company/Listing page #	Operating System: Win	Mac	Unix	Linux	Web	Design Tool: Graphic User Interface or Script	CAPI/CASI Features: Central Management	Predictive Dialing	Tabulation & Analysis Tools	Purchasing: Buy or Lease	Price Range
askiavoice ASKIA - Software for Surveys, p. 60	●					Both	●	●	Yes		
Confirmit Confirmit, p. 61	●				●	GUI	●	●	Yes	Lease	
Converso CATI CONVERSOFT, p. 61	●					Both	●	●	Yes	Either	
Dub InterViewer Nebu b.v., p. 66	●			●	●	GUI	●	●	Yes	Lease	
Eform Beach Tech Corporation, p. 60	●				●	Both			Yes	Either	
IBM SPSS Data Collection Dialer SPSS, an IBM Company, p. 69	●						●	●	Add-on		
IBM SPSS Data Collection Interviewer SPSS, an IBM Company, p. 69	●				●	Both	●	●	Add-on		
Ioxphere Xorbix Technologies, Inc., p. 71	●	●			●	GUI	●	●	Yes	Either	$$
IT CATI/CAPI/Web Interview Technology, p. 64	●				●	Both			Yes	Buy	$$$$
Itracks Online CATI Itracks, p. 64					●	Both	●	●	Yes		
Kereba.com SyClick, p. 70					●	GUI	●		Yes	Lease	$$$
NIPO Fieldwork System for CATI NIPO Software, p. 66	●					Both	●	●	Add-on	Lease	$$$$
Panel Portal - Only for Scripting Toluna USA, p. 70					●	GUI	●		Add-on		$$$$
Panel Portal Whole Solution Toluna USA, p. 70					●	GUI	●		Yes		$$$$
Pronto Voxco (Voxco Group), p. 71					●	GUI		●		Either	
Pulse DNA Software Suite Pulse Group, p. 68	●			●	●	Both				Either	
QPSMR CATI QPSMR Ltd., p. 68	●					Both	●	●	Yes	Lease	$$$$
Raosoft EZSurvey Raosoft, Inc., p. 68	●				●	Both	●		Add-on	Buy	$

$ = $0-$500 $$ = $501-$1,500 $$$ = $1,501-$2,500 $$$$ = $2,500+

CATI Software	Operating System					Design Tool	CAPI/CASI Features			Purchasing	
Software Title Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	Central Management	Predictive Dialing	Tabulation & Analysis Tools	Buy or Lease	Price Range
Raosoft InterForm Raosoft, Inc., p. 68	●				●	GUI	●		Add-on	Buy	
Raosoft SurveyWin Raosoft, Inc., p. 68	●					GUI	●		Add-on	Buy	$
Results for Research 6.0 RONIN Corporation, p. 68	●				●	Both	●	●	Yes	Buy	
SNAP Professional Snap Surveys, Ltd., p. 69	●					GUI			Yes	Buy	$$$
StatPac Survey Software StatPac, Inc., p. 69	●					Syntax			Yes	Buy	$$
Survent CfMC Research Software and Service Bureau, p. 60	●		●	●	●	Syntax	●	●	Yes	Lease	
Survey Said Enterprise Edition Marketing Masters, p. 64	●				●	GUI			Yes	Buy	
SurveyPro Apian Software, p. 58	●					GUI			Yes	Buy	$$$
TelAthena TelAthena Systems LLC, p. 70											
The Survey Cybernetic Solutions - The Survey Software, p. 61	●					GUI	●		Yes	Buy	$
The Survey System - CATI Creative Research Systems, p. 61	●					GUI	●		Yes		$$$
The Survey System - PDA Creative Research Systems, p. 61	●								No	Buy	$
The Survey System (Version 10.0) Creative Research Systems, p. 61	●					GUI	●		Yes		$$
Virtual Call Center Network Itracks, p. 64					●	GUI	●	●	Yes		
Voxco Command Center Voxco (Voxco Group), p. 71					●	GUI	●	●	Yes	Either	
webCATI CfMC Research Software and Service Bureau, p. 60	●			●	●	Both	●	●	Yes		
WinCATI Sawtooth Technologies, Inc., p. 69	●					Both	●	●	Yes	Buy	
WinQuery The Analytical Group, Inc., p. 58	●					Both	●	●	Yes	Buy	$

Web Interviewing Software Solutions

Software Title Company/Listing page #	Operating System: Win	Operating System: Mac	Operating System: Unix	Operating System: Linux	Operating System: Web	Design Tool: Graphic User Interface or Script	Web Interviewing Features: Data Collection (Web or E-mail)	Web Interviewing Features: Web Security	Web Interviewing Features: Quota Control	Web Interviewing Features: Tabulation & Analysis Tools	Web Interviewing Features: Real-Time Reports	Purchasing: Buy or Lease	Purchasing: Price Range
ACA System Sawtooth Software, Inc., p. 69	●				●	GUI	Web	●	●	Yes	●		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 64	●	●	●	●	●	Both	Web	●	●	Yes	●	Either	
ARCS® ARCS®, p. 58	●					GUI	Web	●	●	No	●	Either	$$$$
askiaweb ASKIA - Software for Surveys, p. 60	●					GUI	Both	●	●	Yes	●		
AttentionTracking MediaAnalyzer Software & Research, Inc., p. 65	●				●	GUI	Web	●	●	Yes	●	Lease	
Automated Tracker Cint USA, p. 60					●	GUI	E-mail	●	●	No	●	Buy	$
BayaSoft Custom Development BayaSoft LLC, p. 60					●		Both	●	●	Yes		Lease	
BayaSoft RTD - Real Time Data BayaSoft LLC, p. 60					●		Both	●	●	Yes	●	Lease	
BayaSoft RTR - Real Time Reporting BayaSoft LLC, p. 60					●		Both	●	●	Yes	●	Lease	
Bulletin Board Focus Groups Itracks, p. 64					●	GUI	Web	●	●	Yes	●		
CBC System Sawtooth Software, Inc., p. 69	●				●	GUI	Web	●	●	Yes	●		
Checkbox Mobile Survey Checkbox Survey Solutions, Inc, p. 60	●					GUI	Web			Yes			
Checkbox Survey Checkbox Survey Solutions, Inc, p. 60	●					GUI	Both	●	●	Yes	●	Either	$$
Clipstream™ Video MR Clipstream™ Survey, p. 60	●	●	●	●	●	GUI	Web			No		Either	$
Confirmit Confirmit, p. 61	●				●	GUI	Both	●	●	Yes	●	Lease	
Converso CAWI CONVERSOFT, p. 61	●					Both	Web	●	●	Yes	●	Either	
Converso Enterprise CONVERSOFT, p. 61					●		Web						
Custom Panel Building Itracks, p. 64					●	GUI	Web	●	●	Yes	●		
Customer Connect 360 Sinclair Customer Metrics, Inc., p. 69					●	GUI	Web	●	●	Yes	●		
CVA System Sawtooth Software, Inc., p. 69	●					GUI		●					
Decipher Decipher, p. 62					●	GUI	Web	●	●	Yes	●	Lease	
Digivey Survey Suite™ Creoso Corporation, p. 61	●					GUI	Both	●	●	Yes	●	Either	$$
Dub InterViewer Nebu b.v., p. 66	●			●	●	GUI	Web	●	●	Add-on		Lease	
Eform Beach Tech Corporation, p. 60	●				●	Both		●	●	Yes		Either	
EFS Employee Globalpark Inc., p. 64					●	GUI	Web	●	●	Yes	●	Lease	
EFS Leadership Globalpark Inc., p. 64					●	GUI	Web	●	●	Yes	●	Lease	

$ = $0-$500 $$ = $501-$1,500 $$$ = $1,501-$2,500 $$$$ = $2,500+

Web Interviewing Software Solutions

Software Title Company/Listing page #	Operating System: Win	Operating System: Mac	Operating System: Unix	Operating System: Linux	Operating System: Web	Design Tool: Graphic User Interface or Script	Web Interviewing Features: Data Collection (Web or E-mail)	Web Interviewing Features: Web Security	Web Interviewing Features: Quota Control	Web Interviewing Features: Tabulation & Analysis Tools	Web Interviewing Features: Real-Time Reports	Purchasing: Buy or Lease	Purchasing: Price Range
EFS Panel Globalpark Inc., p. 64					●	Both	Web	●	●	Yes	●	Lease	
EFS Survey Globalpark Inc., p. 64					●	GUI	Web	●	●	Yes	●	Lease	
Empathica Customer Experience Mgmt. System Empathica Inc., p. 62					●		Web	●	●	Yes	●	Buy	$$$$
eQ TeleSage, Inc., p. 70	●					GUI	Both	●	●	Add-on	●	Lease	$$$
eTelescipt Touchstar Software, p. 70					●	GUI	Web	●			●	Buy	
Eval Builder Your Perceptions, Inc., p. 71	●				●	Both	Both	●		Yes	●	Lease	
FindLocation.com Xionetic Technologies, Inc., p. 71					●	GUI	Web					Buy	
FocusVision FocusVision Worldwide, p. 62							Web	●					
Fusion Vision Critical, p. 71					●	GUI	Web	●		Yes	●	Lease	
Hosted Survey Hostedware, p. 64					●	Both	Both	●	●	Add-on	●	Either	
Hosted Survey Lite Hostedware, p. 64					●		Web						
IBM SPSS Data Collection Interviewer SPSS, an IBM Company, p. 69	●				●	Both	Both	●	●	Add-on	●		
IdeaMap®.Net Moskowitz Jacobs Inc., p. 65					●	GUI	Web	●	●	Yes	●		
Inquisite Survey Inquisite Inc., p. 64	●				●	GUI	Web	●	●	Yes	●	Either	$$$$
Intellisurvey Intellisurvey, Inc., p. 64					●	Both	Web	●	●	Yes	●		
Internet Research Manager Domestic Data, p. 62	●					GUI	Both	●	●	No	●	Lease	$$$$
Internet Survey Machine Marketing Masters, p. 64	●	●	●	●	●	GUI	Web	●		Yes	●	Buy	$$$
Ioxphere Xorbix Technologies, Inc., p. 71	●	●			●	GUI	Both	●	●	Yes	●	Either	$$
IT CATI/CAPI/Web Interview Technology, p. 64	●				●	Both				Yes		Buy	$$$$
Itracks Online Surveys Itracks, p. 64					●	Both	Web	●	●	Yes	●		
Kereba.com SyClick, p. 70					●	GUI	Both	●	●	Yes	●	Lease	$$$
Kinesis Survey Kinesis Survey Technologies, LLC, p. 64				●	●	GUI	Web	●	●	Yes	●	Lease	$$$
MarketTools.com MarketTools, Inc., p. 65					●	GUI	Web				●	Either	
MaxDiff/Web Sawtooth Software, Inc., p. 69	●				●	GUI	Web	●	●	Yes	●		$$$
Mobile Surveys Itracks, p. 64					●	Both	Both	●	●	Yes	●		
NetE-nable AutoData Systems, p. 60	●					GUI	Web			Yes		Lease	$$
NIPO Fieldwork System for Web NIPO Software, p. 66	●					Both	Both	●	●	Add-on	●	Lease	$$

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
Online Focus Groups Itracks, p. 64					●	GUI	Web	●	●	Yes	●		
Opinio ObjectPlanet AS, p. 66	●	●	●	●	●		Both	●		Yes	●	Either	$
Opinionmeter's Survey Manager Opinionmeter International, p. 66	●					GUI	Both			Yes	●	Either	$$
Panel Manager Cint USA, p. 60					●	GUI	E-mail	●		No	●	Buy	$
Panel Portal - Only for Scripting Toluna USA, p. 70					●	GUI	Both	●	●	Add-on	●		$$$$
Panel Portal Whole Solution Toluna USA, p. 70					●	GUI	Both	●	●	Yes	●		$$$$
PRO-T-S; GENESYS; ARCS IVR Marketing Systems Group, p. 64	●					GUI	Web	●	●		●	Either	
QualBoard™ 20/20 Technology, p. 70	●	●	●	●	●	GUI	Web	●	●	Yes	●	Either	$$
QualJournal™ 20/20 Technology, p. 70	●	●	●	●	●	GUI	Web	●		Yes	●	Either	$$
QualMeeting™ 20/20 Technology, p. 70	●	●	●	●	●	GUI	Web	●		Yes	●	Lease	$
QueryWeb The Analytical Group, Inc., p. 58	●					Both	Web	●	●	Yes	●	Buy	$$$$
QuestionPro QuestionPro.com, p. 68					●	GUI	Web	●	●	Yes	●	Either	$$
QuestionPro MicroPoll QuestionPro.com, p. 68					●	GUI	Both						
QuestServer QuestMetrics, p. 68					●	GUI	Web			No		Lease	$$$
Raosoft EZReport Raosoft, Inc., p. 68	●					Both	Both			Yes	●	Buy	$
Raosoft EZSurvey Raosoft, Inc., p. 68	●				●	Both	Both	●		Add-on	●	Buy	$
Raosoft InterForm Raosoft, Inc., p. 68	●				●	GUI	Web	●		Add-on		Buy	
Remark Web Survey Professional Gravic, Inc. - Remark Products Group, p. 64	●					Both	Both	●				Buy	$$
Remark Web Survey Standard Gravic, Inc. - Remark Products Group, p. 64	●					Both	Both	●		Yes		Buy	$$
Research Reporter Insight Marketing Systems Pty. Ltd., p. 64					●			●	●	Add-on	●	Either	$$$$
Results for Research 6.0 RONIN Corporation, p. 68	●				●	Both	Web	●	●	Yes	●	Buy	
Revelation Revelation, p. 68													
Sample Access Cint USA, p. 60					●	GUI	E-mail	●	●	No	●	Buy	$
Sensus Web Sawtooth Technologies, Inc., p. 69	●					Both	Web	●	●	Yes		Buy	
SNAP Professional Snap Surveys, Ltd., p. 69	●					GUI	Both	●	●	Yes	●	Buy	$$$
Snap Webhost Snap Surveys, Ltd., p. 69	●					GUI	Both	●	●	Yes	●	Either	$$$$
Software G3 plus Rogator AG, p. 68	●		●	●		GUI	Both	●	●	Yes	●	Either	

$ = $0-$500 $$ = $501-$1,500 $$$ = $1,501-$2,500 $$$$ = $2,500+

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
Sparq Vision Critical, p. 71					●	GUI	Web	●	●	Yes	●	Lease	
SSI Web Sawtooth Software, Inc., p. 69	●				●	Both	Web	●	●	Yes	●		
StatPac Survey Software StatPac, Inc., p. 69	●					Syntax	Both	●		Add-on		Buy	$$
StyleMap®.Net Moskowitz Jacobs Inc., p. 65					●	GUI	Web	●	●	Yes	●		
Survey Console QuestionPro.com, p. 68					●	GUI	Both	●	●	Yes	●	Lease	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 69	●					GUI	Both			Yes		Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 64	●				●	GUI	Web			Yes		Buy	
Survey Select Expert SurveyConnect, Inc., p. 69	●					GUI	Both	●		Yes		Buy	$$
Survey Tools For Windows William Steinberg Consultants, Inc., p. 69	●					GUI	Both			Yes		Buy	$$
surveyNgine.com Database Sciences, Inc., p. 61					●					Yes			
SurveyPro Apian Software, p. 58	●					GUI	Both	●	●	Yes	●	Buy	$$$
SurveySquare.com www.SurveySquare.com, p. 70	●					Both	Both	●	●	Yes	●	Lease	$$
SurveyWriter SurveyWriter, p. 70					●	GUI	Both	●	●	Yes	●	Either	$
TestKit Hexworx Computer Services P/L, p. 64	●		●	●	●	Both	Web			Yes		Buy	$
The Survey Cybernetic Solutions - The Survey Software, p. 61	●					GUI	Both	●		Yes		Buy	$
The Survey System - CATI Creative Research Systems, p. 61	●					GUI	Both	●	●	Yes	●		$$$
The Survey System - PDA Creative Research Systems, p. 61	●						Both	●	●	Add-on	●	Buy	$
The Survey System - Web Creative Research Systems, p. 61	●					GUI	Both	●	●	Yes	●		$$
The Survey System (Version 10.0) Creative Research Systems, p. 61	●					GUI	Both	●	●	Yes	●		$$
Think Virtual Fieldwork Think Virtual Fieldwork, p. 70					●		Both						
Vovici v4 Enterprise Vovici Corporation, p. 71						GUI	Both	●	●	Yes	●	Either	$$$$
Vovici v4 Professional Vovici Corporation, p. 71					●	GUI	Both	●		Yes	●	Either	$$$$
Voxco Command Center Voxco (Voxco Group), p. 71					●	GUI	Web	●	●	Yes	●	Either	
webCATI CfMC-U.K., p. 60			●	●	●	Both	Web	●	●	Yes	●	Lease	
WebSurvent CfMC Research Software and Service Bureau, p. 60	●		●	●	●	Both	Web	●	●	Add-on	●	Lease	
Zoomerang MarketTools, Inc., p. 65					●	GUI	Web	●	●		●	Either	

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/Tagline Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling System	Translation	Web Usability
2D VOG SensoMotoric Instruments, p. 69	•																
3D VOG SensoMotoric Instruments, p. 69	•																
AccessPoint for Market Research Global Bay Mobile Technologies, p. 64	•							•	•								
ActiveGroup ActiveGroup, p. 58											•						
Address Coder ESRI, p. 62		•					•										
ArcGIS 9.3 Business Analyst ESRI, p. 62							•										
ARCS® ARCS®, p. 58												•					
ARGUS Perceptual Mapper SPRING SYSTEMS, p. 69					•	•											
Arthur The Analytical Group, Inc., p. 58			•														
ASDE Survey Sampler - Canada ASDE Survey Sampler, p. 60															•		
ASDE Survey Sampler - USA ASDE Survey Sampler, p. 60															•		
Automated Tracker Cint USA, p. 60								•							•		
Brand Profiler WRC Research Systems, Inc., p. 71					•												
BrandMap WRC Research Systems, Inc., p. 71					•												
BrandTrend WRC Research Systems, Inc., p. 71				•													
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$ = $0-$500 $$ = $501-$1,500 $$$ = $1,501-$2,500 $$$$ = $2,500+

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By Joseph Rydholm
Quirk's editor

Research 2010: more work, more data, same budgets

I'm hoping that some day soon we'll be able to stop doing these "impact of the recession on research" stories. But after reading a recent Forrester Research report, I knew we had to revisit the subject.

Rather than further depress me, "Predictions 2010: What Will Happen In Market Research" actually provided some hope. I came away feeling that the silver lining around this dark recession cloud could be that the in-house research function emerges from 2010 with a new identity, one forced by economic circumstances to become more relevant and more efficient.

Based on the Forrester opinions, in an ideal world, research departments will look internally and discover hidden talents and abilities, glean fresh insights from old studies, harness and exploit Web-based data streams, and make their input a valued part of marketers' decision-making.

Sounds simple, right?

I know we don't live in an ideal world. And it's all easy for me to say, since I'm not faced with soul-crushing realities like risk-averse coworkers, research-phobic upper management, parsimonious procurement departments or any of the other bugaboos that plague the in-house marketing researcher.

But the Forrester report makes me feel that rather than stagnating and fossilizing into irrelevance, researchers seemingly have the chance, thanks to the recession, to reinvent their function.

Exciting times

The report, which retails for $499, was written by Reineke Reitsma, with Jackie Anderson, Tamara Barber and Rebecca Smith, and draws from Forrester's own research and other sources. (Forrester also maintains an interesting blog for researchers at http://blogs.forrester.com/consumer_market_research/.)

In an e-mail interview, the Netherlands-based Reitsma, who is vice president, research director at Forrester, agreed with my view that these are exciting times for research professionals. "There are many developments going on that make it easier for market researchers to focus on adding value, instead of just sharing the numbers. Innovative research methodologies like [market research online communities], mobile research or online ethnography make it easier to get closer to respondents, and, in the case of mobile, track their behavior anytime, anywhere."

Still, Reitsma says, the pressure on market research departments is increasing. "Executives expect high-quality insights even faster than they did before. There aren't many companies who will see MR as a needless expense, however a real threat is the large uptake of listening software like BuzzMetrics or TNS Cymfony within companies. This software helps companies understand what's being said about their brands online – in blogs, discussion boards, Twitter, etc. – and in publications. The reports coming from these tools give companies insight into the consumers' emotions and engagement with their brands. The pitfall lies in the fact that as these insights travel across the organization, less research-savvy colleagues will use them without understanding their bias – that they reflect only the opinions of those customers most willing to share. The most successful firms will be those that always analyze community insights in the context of other research."

The report argues that increasing numbers of large companies will create departments to manage, track and measure these external information streams and combine them with internal sources to generate insights and reports. Thus researchers will have to collaborate with these departments to understand just what they are tracking and measuring and also determine how to package and present the data internally.

Insourcing like never before

In-house research functions are insourcing like never before, trying to find ways to do more with less, which may be a boon to firms like Confirmit, MarketSight and Vovici, Forrester says. Reitsma expects the insourcing trend to accelerate, with online tool vendors seeing 15 percent to 20 percent growth. "The beachheads the tool vendors have gained will allow them to continue to enhance their capabilities with customer-driven insights. This insourcing will include routine studies of customers, some qualitative research that shifts to self-service market research online communities and the continued growth of comprehensive enterprise feedback management research tool capabilities."

In addition, the recession has forced in-house departments to take inventory of previously-conducted research. This not only saves money by maximizing already-spent budget and decreasing current spend but it also helps improve institutional memory by exposing analysts to historical data and insights.

Consolidating vendor lists

The report also posits that research buyers will continue consolidating their vendor lists, constantly reviewing contracts to see which ones can be eliminated, amended or terminated. So where does this leave the research vendors? How can they keep themselves off the chopping block when those contracts are up for review? "Based on the conversations I've had with research buyers, it's clear that the key lies in the contribution a vendor has to the company," Reitsma says. "Market research vendors need to focus more on what makes them unique, and invest in the relationship with their clients. This means understanding the industry they're in, tracking developments within that industry and not only reporting research results but making sure to put them into perspective. Especially when a vendor/client relationship is longstanding, or if the vendor does a lot of projects for the client, companies expect more from their vendors.

"Something else that came up in these conversations is that most client-side researchers have a strong need for benchmarks. They not only want to know how their brands are performing but they'd like to understand how this relates to other brands within their industry. Vendors that can offer this type of benchmark are perceived as more valuable."

An excess of work

I asked Reitsma about the likelihood of MR budgets being restored once the economy improves and she says that an excess of work, not a lack of funding, has been the problem. "To better understand how the recession has changed market researchers' lives in the past year, we've conducted a survey of Forrester's Research Panel For Market Research Professionals about workload, the recession and prioritization. Contrary to expectations, the majority of respondents haven't experienced a reduction in force or a budget cut, but the number of projects and the workload have increased in the past year."

Further, she says, researchers have had to justify their spending more so than in the past and it has taken longer to get approval – realities that won't soon go away. This also means that research vendors, who have felt compelled to lower pricing to remain competitive during the downturn, won't be able to raise prices any time soon. "I do think that research buyers want to stick to the project costs they've been paying in the past year. They still are under severe scrutiny to justify all the costs made, which makes it hard for them to accept any price increase. If vendors want to increase their price it links back to one of my earlier comments: market research vendors have to add more value to make sure they can't easily be replaced or end up in a price war." | Q

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Coming in the March issue...

Case study: CiCi's Pizza

Find out how the Texas-based CiCi's Pizza chain uses mystery shopping to help triangulate its way to customer satisfaction.

Traveling the road to recovery?

Read Lincoln Merrihew's in-depth analysis to find out if bluer skies and calmer seas are ahead for the U.S. travel industry.

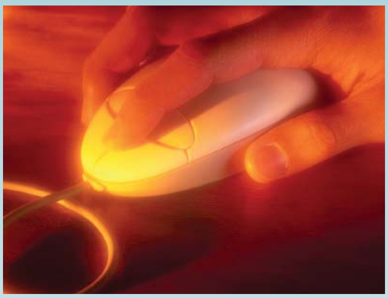
before you go...

online and offline

News about Quirk's and quirks.com

Looking to help the people of Haiti?

Quirk's has personally been involved for 15+ years with Food for the Poor Inc., an organization that runs orphanages, food kitchens, medical clinics and job programs in Haiti. Nearly 98 percent of all contributions reach those in need, so your donation will be put to good use. Fortunately, Food for the Poor's facilities did not suffer catastrophic damage, so they are still able to aid the people of Haiti. Visit www.foodforthepoor.org to donate.



Search software offerings online

This February issue features the annual print edition of Quirk's Software Directory, which is also searchable online at quirks.com/directory/software/index.aspx. Information in the directory is submitted and updated throughout the year, so be sure to check back for new offerings. If you'd like to get your company's software solution listed with Quirk's, contact Alice Davies at alice@quirks.com.

Scope out the 2010 industry happenings at quirks.com

From hour-long Webinars to four-day conferences, Quirk's is dedicated to providing the most comprehensive list of research industry goings-on. Visit our events page at quirks.com/events to see what's coming up. Quirk's also offers featured event listings in the monthly print edition and twice-monthly e-newsletter. To list your event for free or to have an event featured, contact Emily Goon at emily@quirks.com.

cover-to-cover

Facts, figures and insights from this month's issue

> More than 90 percent of used-vehicle buyers say they visited at least one third-party Web site during the shopping process. Slightly more than three-fourths of buyers report visiting a dealer Web site. *(page 8)*

> Sony has asked panelists about the panel itself, and contrary to expectations, panelists requested more questionnaires (in a higher frequency) rather than fewer. And the majority pointed out that participating in the music panel is more important than the incentives. *(page 26)*

> Anthropologists often talk about the importance of creation myths in substantiating belief systems that generate meaning to social groups. The story of the chain's founding provides Beleza Natural with a symbol for the yearnings of its customer base. *(page 30)*

> Winning brands for kids/tweens don't divide the family; they allow for co-consumption, co-entertainment and, simply, cooperation. Think M&M'S, not Pop Rocks; think Monopoly, not Pokemon. *(page 51)*

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Congratulations to December's winner, David Yearout of CenturyLink, Overland Park, Kan. December's prize was a choice of one deliverable from the Four Rs of Research study.