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QUIRK'S
Marketing Research Review

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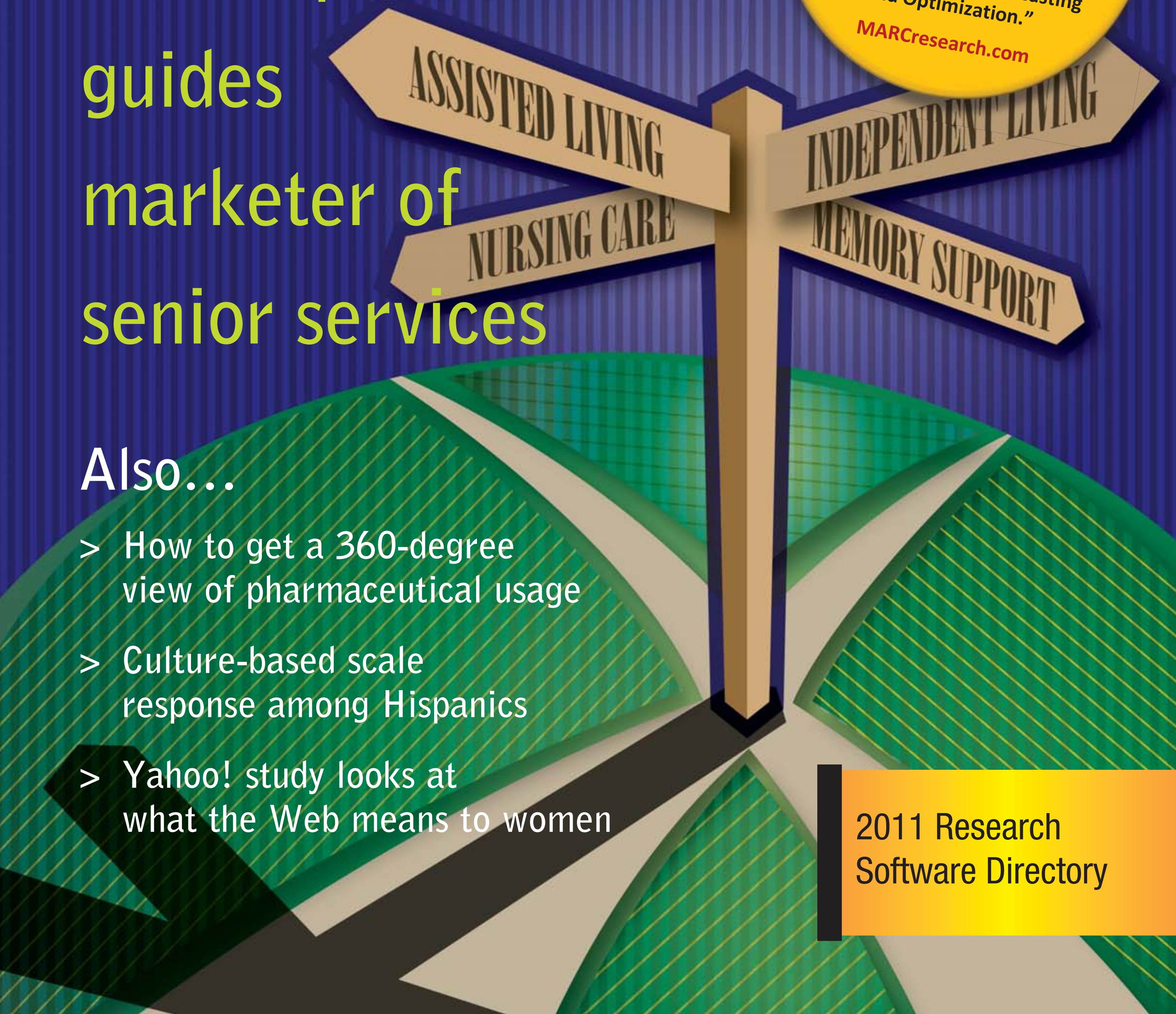

Also...

> How to get a 360-degree view of pharmaceutical usage

> Culture-based scale response among Hispanics

> Yahoo! study looks at what the Web means to women

2011 Research Software Directory

Quirk's Marketing Research Review
Volume XXV Number 2

contents

case study

techniques

columns

departments

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in case you missed it...

news and notes on marketing and research

Be accessible, honest, friendly - the rules of engagement for brands on Facebook

Many have lauded social media as a way for brands to form a personality and connect with consumers beyond the obvious corporate information and occasional coupons. What many didn't expect is that failing to give your brand a more human face in social media could make you seem even more foreign and inaccessible, according to a study from Firefly Millward Brown, a Westport, Conn., research company. This only further proves the point that social networking for social networking's sake can be disastrous and that brands need to have a mission when they tweet or post to Facebook.

Research indicated that although most organizations recognize the potential and importance of social media, they are confused about the rules of engagement and lack organizational support and confidence. To help companies and brands secure their footing in this uncharted terrain, here are 10 rules for engaging with social media for corporations.

1. Don't recreate your homepage. Consumers want to see something new, fresh or different.
2. Listen first, then talk. Consumers want a conversation where brands listen to what they have to say.
3. Build trust by being open and honest. Transparency is key for brands in social media and is the most critical factor in building trust.
4. Give your brand a face. Brands often suffer in social media because they don't have anyone who answers to the consumer, a face for the brand.
5. Offer something of value. Consumers are more likely to respond to brands that offer them something real and tangible, preferably without wanting something in return. While discounts and coupons are in vogue for brands in social media, they can create distrust. Exclusive content, deals or inside information on new products and services are valued by consumers.
6. Be relevant.
7. Talk like a friend, not a corporate entity.
8. Give consumers some control. Brands that embrace consumer input and promote it will be more effective in managing the conversation.
9. Let consumers come to you. Consumers do not want to feel that brands are shouting messages at them.
10. Let consumers talk for you. Brands achieve more kudos when consumers take the initiative and advocate them. The 2010 Toyota campaign where real people talked about their stories on Facebook and were then featured in a television ad is a great example of how a brand can build relationships by encouraging customers to participate in conversations, rather than by overt sales efforts.

What it takes for an app to succeed: free, fun, functional

For an app just to gain adoption it takes tremendous functionality, usability, media and a bit of luck. Free helps, too. Some 44 percent of app users said that all or nearly all of their apps were free, according to a study commissioned by promotion agency Moosylvania and conducted by Great Questions LLC and First Choice Facilities Research.

The study also found that the majority (80 percent) of smartphone users surveyed used apps, but apps aren't as dominant as marketing might have you believe. They may be a much-hyped promotional tool but almost half of respondents indicated they used the Internet more often than apps on their mobile devices. In fact, while they reported owning as many as 30 apps, most mobile users (85 percent men and 75 percent women) actually use only about 10 on a regular basis.

Among male respondents, the top 10 apps cited were Google Maps (14 percent), Facebook (13 percent), Pandora (6 percent), Weather (3.2 percent), ESPN (3.1 percent), Angry Birds (2 percent), Words With Friends (1.4 percent), Shazam (1.3 percent) and Yahoo (0.9 percent). Twitter and Yelp! tied for 10th place (0.8 percent each).

The top 10 picks for females were Facebook (27 percent), Google Maps (7 percent), Weather (5 percent). Pandora (4.5 percent), Twitter (2.9 percent), Google (2.5 percent), Words With Friends (2.4 percent), Shazam (1.4 percent) and Solitaire (1.1 percent). Bank of America and Calendar tied for 10th place (0.9 percent each).

"Brand-sponsored mobile apps should overcompensate on what consumers need - and not be too self-serving," said Norty Cohen, CEO of Moosylvania. "You don't necessarily need to be in the top 30 to be successful. Marketers need to understand that just having an app isn't the total answer - they'll need to combine it with other branding, promotion and experiential efforts to make it successful. It is a highly-targeted, long-term strategy. It is definitely growing in popularity, but this doesn't necessarily translate into a huge audience for every app."

Android is from Mars, iPhone is from Venus?

While electronic gadget may seem inherently androgynous, it seems that popular technology devices tend to have a gender as women gravitate toward the Kindle and iPhone and men favor the iPad and Droid, according to Jenna Goudreau's December 7, 2010, Forbes.com blog, "Is The iPhone For Girls?"

Marketing research group Women at NBCU monthly tracks the top 500 brands that are most important to women by following what they search for and talk about online, and Apple's iPhone has consistently been at the top of the top-500 brands, reaching the No. 8 spot in October 2010 (up 14 spots from August 2010). Separately, research from Nielsen finds that women show a greater preference for the iPhone while men show a stronger interest in Motorola's Droid. The majority of women (31 percent) preferred Apple's operating system, but the majority of men (33 percent) preferred Android. Why the split? According to mobile technology analyst Sascha Segan, a columnist at *PC Magazine*, it all comes down to marketing. "They have been advertising Android phones with these aggressive, violent ads," said Segan. "They've made the Droid persona a threatening robot with a red eye. It's an ad campaign that is targeting men."

If a battle of the sexes is playing out between phone brands, what about other devices? Amazon seems to be after women to purchase its Kindle, as one commercial features a woman and man lounging by the pool. As the man struggles to read an iPad in the sunlight, he asks how she is able to read from her device. The woman explains that it's a Kindle and that she paid more for her sunglasses. It seems to be effective pandering as the Kindle is winning the female vote. On NBCU's brand index, the Kindle jumped up 200 spots in its importance to women, from No. 386 in September 2010 to No. 170 in October 2010. According to data from the Pew Research Center, more men than women own tablet computers (like the iPad) while more women than men own e-book readers (like the Kindle).

Smartphones find favor with 'experience factor'

Three years ago the primary concern of many customers when buying a mobile phone was whether their model of choice had an appealing design and was equipped with the latest technology, such as Wi-Fi, GPS or a high-resolution camera. Today, the "experience factor" may be the most important consideration for smartphone owners, according to a survey by Nuremberg, Germany, research company The GfK Group.

While a compelling telephone design and features at the cutting edge of technology certainly remain popular, in light of the large selection and the relatively minor differences between the offers of various providers, there is a danger that products and brands are becoming increasingly interchangeable, according to GfK's study, which queried smartphone owners in Germany, Spain, the U.K., China, Brazil and the U.S.

What can set them apart? The experience factor. In other words, the possibilities that the use of a specific smartphone offers them. A decisive aspect of the experience factor is the device's operating system, but it is also linked to the possibility of surfing the Internet and the ease of installing apps.

Smartphone owners in Germany are significantly more satisfied with their current operating systems, with 41 percent reporting they would like their next phone to have the same OS as their current one. At the international level only one in four smartphones users would like to use the same operating system for their next phone. Owners of smartphones manufactured by Apple seem to be particularly satisfied, with 69 percent of current owners in Germany intending to choose a device with this operating system for their next purchase. For the competitor system Android this figure stands at 54 percent in Germany, and among BlackBerry users the percentage is 41 percent.

However, across all operating systems, the number of those who are keeping their options open for the selection of their next mobile phone is 56 percent internationally. Here smartphone providers have ample potential to find favor with consumers by offering a superior experience factor. In this respect, the quality of the experience factor will increasingly depend on the sphere of experience not being limited to the smartphone in the future.

For 44 percent of respondents, the smooth combination of mobile phone, laptop and tablet PC is the most important consideration when choosing an operating system. Success will therefore be enjoyed by those smartphone providers who offer consumers a world of experience which, in addition to providing access to different apps and services and being user friendly, also presents the opportunity to transfer the experience factor to other devices with larger screens. For more information visit www.gfk.com.

Affluent Americans immersed in technology more than the rest

Ninety-five percent of adults in households earning over $75,000 annually use the Internet and cell phones and are more likely to use the Internet on any given day; own multiple Internet-ready devices; do things involving money online; and get news online, compared to lower-earning households. These are a few of the major ways in which higher-income households differ from other Americans in lower-income households in their tech ownership and use, according to data from Pew Research Center's Internet and American Life Project, Washington, D.C.

Some 95 percent of Americans who live in households earning $75,000+ per year use the Internet at least occasionally, compared with 70 percent of those living in households earning less than $75,000. Even among those who use the Internet, the well-off are more likely than those with less income to use technology. Of that 95 percent of high-income Internet users, 99 percent use the Internet at home (versus 93 percent of the Internet users in lower brackets); 93 percent of higher have some type of broadband connection (versus 85 percent); and 95 percent own some type of cell phone (versus 83 percent).

The differences among income cohorts apply to other technology as well. The relatively well-to-do are also more likely than those in lesser-income households to own a variety of information and communications gear. Seventy-

continued on p. 64

names of note

Pamela Ann Wegmann, founder of *Information Matters*, a New Orleans research firm, died on December 11 at age 59.

Ipsos Understanding UnLtd., a Cincinnati research company, has promoted **Kristin Sharp** to CEO, qualitative, U.S.

Lloyd Burdett has been named head of consulting for Chapel Hill, N.C., research firm *The Futures Company*.

New York researcher *The Nielsen Company* has appointed **Bill Moult** as president, media analytics.

Cincinnati research company *Burke, Inc.* has promoted **Tim George** to vice president, human resources. Additionally, the company has hired **Jane Thurston** and **Thania Farrar** as senior account executive, client services.

Thurston Paul

Bruce Paul has joined Chicago research company *Synovate* as senior vice president. He will be based in New York.

Evolution Marketing Research, Blue Bell, Pa., has named **Michael Heasley** partner and director, quantitative research.

Vancouver, B.C., research company *Vision Critical* has made two appointments to its U.K. team: **Gina Lagos**, senior research director; and **Mike Stevens**, senior vice president, research. Both will be based in the company's London office. Separately, **Ad Voogt** has been named to Vision Critical's board of directors.

Insight Research Group, London, has made several appointments to its New York operation Insight Health US: **Andrea Bartzen**, director, strategic business; **Gary Fernandez**, account manager; **Trevor Jenkins**, research assistant; and **Jennyfer Parra**, office manager.

New York social media consultancy *Converseon* has hired **Mark Kovscek** as senior vice president, enterprise analytics. Research will be among his responsibilities.

Research Now, Plano, Texas, has promoted **Craig Stevens** to executive vice president, global client development. The company has also named **John Tan** senior vice president, global operations.

Stevens Tan

Alex Batchelor has been elected to London research company *BrainJuicer Group PLC*'s board of directors as an executive director.

Tom Drouillard has been named president and CEO of *Scarborough Research*, New York.

London research company *YouGov* has hired **Jane Ormiston** as executive vice president, marketing insights, North America.

Framingham, Mass., research company *Kadence International* has appointed **Patrick Young** as insight manager. Additionally, the company has hired **Heather Baker** as graduate insight executive. Both will be based at the company's U.K. office.

Redwood Shores, Calif., research consultancy *Added Value* has named **Jonathan Hall** executive vice president, managing director of Cheskin Added Value, effective March 2011.

Jackie Polyakov has been named vice president of Cincinnati research company *MarketVision*.

Polyakov Latta

Coastal Carolina University, Conway, S.C., has named **Michael Latta** associate dean of the E. Craig Wall Sr. College of Business Administration.

GfK Custom Research North America, New York, has promoted **Thomas Finkle** and **David Krajicek** to co-president.

Premier Retail Networks Inc., a San Francisco media services company, has hired **Raymond Pettit** as vice president, market research.

Directions Research Inc., Cincinnati, has promoted **Tiffany Bailey** to account manager.

CustomerLink Systems, a Roseville, Calif., marketing automation technology company, has promoted **Jim Bonfield** to senior vice president, business planning and development. Research will be among his responsibilities.

Joseph Cesaria has joined Los Angeles research company *Ipsos OTX MediaCT* as senior vice president, business development.

continued on p. 69

Decipher debuts a Beacon for self-service research

Fresno, Calif., research company Decipher Inc. has rolled out Beacon, its research software suite designed to allow users to build and deploy their own online surveys to target audiences by integrating Decipher's data collection capabilities with a simple-to-use graphic interface. Beacon aims to offer the cost- and time-savings of a self-service platform while delivering customizable survey construction; quality-assurance review; targeted reporting; data download; and more.

Beacon also features built-in functionality for users to author their own surveys, with numerous question formats, multiple languages and branding customization. A reporting portal monitors data collection in real time, providing a variety of downloadable data file types and the ability to customize data to any level of complexity. For more information visit www.decipherinc.com.

New reporting tools to help automate survey processing

Sunnyvale, Calif., research software company iCharts has launched survey reporting tools for automating the processing of surveys. The company's tools are designed to support all standard survey questions, including Likert scale, forced ranking, multi-select and semantic differential. The offering also includes a zero-aggregation engine intended to understand the structure of the survey and then process the data without having to create crosstab tables. Other features include support for all survey types; support for all question types, including 2-D or 3-D grids; automatic calculation of base sizes; recoding of open-ends or category lists; ability to specify multiple weights; support for analysis and commentary in online reports; and online reports downloadable to PowerPoint. For more information visit www.ichartsbusiness.com.

The Survey System debuts Web-CATI module

Creative Research Systems, Petaluma, Calif., has released a Web-CATI module for its Survey System product that is designed to allow telephone interviewers to work from home or other remote locations instead of in a central phone bank. With the module, the interviewer needs only a regular phone and a broadband Internet connection, plus a browser-equipped PC or Mac. The solution is also designed to work through VOIP systems such as Skype. The Survey System software aims to produce the various live online detail and survey summary reports needed.

To use the platform, the central office requires a minimum of The Survey System Professional Edition with the Web, CATI and Web-CATI modules, plus a Windows-based Web server. For more information visit www.surveysystem.com.

Brand Graph Digital set to measure digital marketing

Norwalk, Conn., research company Ipsos ASI has introduced Brand Graph Digital, a solution intended to provide in-market testing capabilities and deliver results to allow advertisers to quickly determine brand, platform, message and campaign performance, based on real-time insight for digital advertising campaigns. The Brand Graph Digital solution is designed to deliver an in-market evaluation of how target audiences are responding to advertising campaigns early in the media plan, offering analysis of what works and what doesn't work and then allowing marketers to tweak and adjust advertising campaigns as needed. For more information visit www.ipsos-asi.com.

Kinesis Survey expands to include Google Analytics

Kinesis Survey Technologies LLC, an Austin, Texas, research company, has added built-in support for Google Analytics to its Kinesis Survey platform. The integration is intended to allow Kinesis Survey users to track respondent activity by each survey URL for all projects. Via Google Analytics, Kinesis Survey URLs can be tracked to identify metrics including page views; traffic sources; geographic locations; unique visitors; device types; operating systems; and more. This data can be utilized to refine recruitment; sampling; quota management; and survey design strategies, as well as to measure survey traffic over time. Google Analytics functionality is included at no additional cost. For more information visit www.kinesissurvey.com.

Empathica launches analyst suite

Empathica Inc., a Mississauga, Ontario, research company, has launched Analyst Suite, a solution designed to provide business analysts with tools to perform complex queries on customer experience data. Analyst Suite capabilities aim to allow users to select criteria to extract data for custom reports, explore hypotheses and discover strategic insights beyond operational trends.

Analyst Suite is offered as a software-as-a-service solution built on Radnor, Pa., business software company QlikView's in-memory, associative search technology. Datasets are processed in real time as requests are entered into Analyst Suite. Additional criteria can be automatically aggregated into an existing search without the assistance of an IT department. For more information visit www.empathica.com.

continued on p. 66

research industry news

News notes

Columbia, Md., research company **Arbitron Inc.** has lost accreditation from the **Media Ratings Council** (MRC), New York, for its RADAR and Nationwide network radio ratings. The MRC has elected to withdraw accreditation because the services use data from an increasing number of unaccredited Portable People Meter (PPM) markets. According to Arbitron, it intends to continue to use commercially-reasonable efforts in good faith to pursue MRC accreditation of its PPM ratings service; to regain accreditation for RADAR and Nationwide; and to keep the accreditations it has. The PPM service is active in 43 markets and accredited in Houston; Riverside, Calif.; and Minneapolis.

The Federal Trade Commission (FTC), Washington, D.C., has released an FTC staff report on protecting consumer privacy, addressing the need for greater consumer education; efforts to incorporate "privacy by design" into online services; and improving consumer notice and choice. Members of the **Interactive Advertising Bureau** (IAB), New York, are reviewing the report and plan to address the proposal of a government-run Do Not Track mechanism for the Internet, which would essentially require reengineering the Internet's architecture. According to the IAB, consumers depend upon sharing of data within this architecture to customize news sites; optimize Web services such as social networks; receive relevant content and advertising across the Web; and more. For more information on the IAB's response visit www.iab.net.

Cincinnati research company **Burke, Inc.**'s corporate headquarters has been awarded LEED gold as established by the **U.S. Green Building Council** and verified by the **Green Building Certification Institute**, both of Washington, D.C. LEED is a program for the design, construction and operation of high-performance green buildings.

Vancouver, B.C., research company **Vision Critical** has entered into a charitable partnership with **WorldBed**, a nonprofit that provides cot-sized emergency field beds to disaster victims around the world.

SRA Research Group, Jupiter, Fla., celebrated its 25th anniversary in November 2010.

Acquisitions/transactions

Chicago research company **Synovate** has agreed to acquire a majority stake in **Comcon**, a Moscow research company. Synovate's existing Russian business and Comcon will combine their management, operations and research capabilities into a single Synovate-branded business.

Schlesinger Associates, an Edison, N.J., research company, has acquired Paris fieldwork agency **ConsuMed Research** and Paris focus group facilities **Passerelles**. Eric Nalpas of ConsuMed has been appointed managing director of the firms, which will operate as Schlesinger Associates companies.

New York research company **TNS** has acquired **Retail Insights**, a Brussels, Belgium, research firm. The Retail Insights team will join TNS.

Alliances/strategic partnerships

New York researcher **The Nielsen Company** and **Beijing China Cable Union Data Services Ltd.** (CCData) have entered into a joint venture, Nielsen-CCData, to deliver insight on China's digital TV market.

Research companies **Enprecis**, Seattle, and **Sinotrust**, Beijing, have collaborated to help car manufacturers in China measure customer response to product quality using the Enprecis Continuous Quality Insight online survey and reporting platform for the global automotive industry.

Saskatoon, Saskatchewan, research company **Itracks** has partnered with research companies **AskingCanadians**, Toronto; **EMI – Online Research Solutions**, Cincinnati; **Focus Forward**, Fort Washington, Pa.; and **Schlesinger Associates**, Edison, N.J., to create a network of panel providers to offer qualitative services to Itracks' The Global Online Moderator Community.

Separately, Itracks has brought on Jeffery Hayzlett, author and marketing expert, to provide strategic feedback to Itracks and its leadership team.

Research companies **Rentrak Corporation**, Portland, Ore., and **Ciné Chiffres**, Paris, have partnered to form **Rentrak Ciné Chiffres**, a division intended to provide box-office measurement throughout France using Rentrak's Box Office Essentials and International Box Office Essentials services.

Warwickshire, U.K., data specialist **Market Location** has entered into an agreement with Omaha, Neb., research company **Infogroup Inc.** to continue to serve U.K. customers under the infoUK brand. Market Location will fuel infoUK's database and online portal.

New York research company **Millward Brown** and Annapolis, Md., semantic Web platform

continued on p. 68

By Bill Abrams

The value of second sight in qualitative and ethnographic fieldwork

Editor's note: Bill Abrams is president of Housecalls Inc., a New York research firm. He can be reached at 212-517-9039 or at bill@housecallsobserve.com. To view this article online, enter article ID 20110201 at quirks.com/articles.

Qualitative researchers performing fieldwork focus intently on consumers' actions and their answers to probing questions. In their eagerness to extract the meat of the moment, even the most experienced researchers may overlook telling visual and verbal details. Eyes shifting away in response to a certain question. A changing tone of voice. Other family or focus group members smirking in reaction to a respondent's explanation. A rug stain a homeowner hopes a researcher won't notice. A hand clenched in frustration when a shopper can't find the brand she wants.

In addition, there is always a semi-anxious sub-chatter going on in the back of a researcher's mind when he or she engages the respondent. "Am I getting this consumer's real feelings about the product? Maybe I'm coming on too strong. Are my questions beginning to bore her? What else can I do to open her up?"

Anxieties like these are the mark of a sensitive, tuned-in researcher. But they can divert attention and reduce the objective appraisal of what a researcher is seeing and hearing - be it in a consumer's home, in a focus group, even online.

That's why a second pair of eyes and ears belonging to someone who was not present during the fieldwork can be helpful. Someone who can replay the videos as many times as they need to catch all the visual and verbal nuances. Who can take a fresh, uninvolved look at the videos of each ethnography interview or focus group without external or internal distractions, without having to think about their own effect on the respondent. Someone who makes their own objective appraisal of what the camera sees and hears. In other words, second sight.

Second sight is performed by another researcher or can even be done by the client. In one of our recent food-category projects, it was the client, going over the interview DVDs, who noted the unusual preponderance of high-quality cooking equipment in the kitchens of a particular consumer segment - a meaningful indication of the special importance of food in their lives.

A secondary perusal of body lotion ethnography discovered that women were using the product not just to heal or soften their skin. They would spend time massaging their bodies

snapshot

This article cites several examples of how another researcher's viewing of video from ethnographic or focus group fieldwork can uncover previously overlooked insights.

while they sat in front of their TV or listened to music. The lotion was part of their relaxing ritual. It made them feel the way they felt when they were immersed in a bubble bath – away from the cares and obligations of the day. A new benefit for an old personal-care category.

Looking over the behavior of consumers pushing a newly-designed lawn fertilizer spreader, a second researcher noticed that they hesitated or stopped whenever they needed to manipulate the release lever. After watching a number of consumers acting similarly, he realized why: The release lever was on the left side of the handle and most consumers were right-handed. It was too awkward for them to use without stopping. A simple change of the release lever position to the right side was suggested to the client.

Studying the self-made videos of seniors on a long car trip, a second researcher noticed that a number of participants in the study happened to praise the last amenity they received at a motel – the continental breakfast. The researcher also noticed that these same travelers usually picked the same motel chain as their previous choice at their next stop – even when they had to travel a little out of their way. It became clear that a satisfying continental breakfast was one of the strongest determinants of motel choice.

A hidden camera, set up in a large drug store, recorded a woman looking unsuccessfully for a particular toothbrush brand. A second-sight researcher picked up on her clutching her hands in anger. The observation ultimately resulted in larger, more prominent graphics for the brand involved.

Arrive at new insights

The second-sight researcher should develop a collegial relationship with the primary researcher, exchanging his or her observations and insights. Feeding off each other, they may both remember details that reinforce the findings. Together, they may even arrive at new insights neither would have come to alone.

Sometimes the objective, second-sight researcher can pull together the disparate threads of various interviews into an overriding theme that the primary researcher, immersed in the detail of each interview, may not have been able to step back and see. In more than a few cases, we have seen second-sight researchers help the primary researcher to arrive at a project's conclusions and suggest a strategic recommendation.

Yes, second sight research may add more time to the project. But if the secondary researcher receives copies of the interview videos while the fieldwork is in progress, the extra time involved can turn out to be negligible. And implications perceived by second sight can be shared with the primary researcher and incorporated into the interviews that follow.

A second pair of eyes and ears may also may involve a little more money. But teamwork between the objective and the immersed researchers can multiply the value of the observations, the validity of the findings and the focus of the recommendations. Whenever it has been part of a project, we have found second sight to be more than worth it in the richer insights and often more actionable conclusions delivered to the client. | Q

By Jim Starks

Culture-based scale response bias among Hispanics

It is hardly news to frequent practitioners of multicultural research that different cultural groups respond to scalar questions differently. In the U.S. particularly, scale response differences between Hispanics and non-Hispanics have long complicated market researchers' attempts to draw meaningful conclusions about differences between them. It is broadly accepted that Hispanics tend to utilize extreme scalar points more frequently, frustrating direct comparisons with non-Hispanics.

There has been significant research on this topic of late, given the importance of Hispanics in the U.S. market. For example, a 2008 University of Florida Study[1] explored the paradox that Hispanics report health care similar to or less positive than non-Hispanic whites, yet have more positive ratings of care. The researchers concluded that Hispanics exhibited greater usage of extreme responses (particularly high scores) than non-Hispanic whites. Additionally, Robert Culpepper (Stephen F. Austin State University) and Raymond Zimmerman (University of Texas, El Paso) concluded from a study published in the *Journal of International Business Research* in 2006 that "Hispanic respondents exhibited not only extreme response bias … but also used significantly fewer midpoints on the scale."[2]

For those among us who specialize in multicultural research, any conclusion that generalizes the behavior of all Hispanics generally raises suspicion. We acknowledge that it may be true, but the premise lumps all Hispanics together as a homogeneous group and very often results in misunderstandings and poor interpretation of research results. Since we know that there are a wide variety of cultural differences among Hispanics (U.S.-born vs. foreign-born; recent immigrant vs. long-time resident; Cuban vs. Mexican, etc.), it is reasonable to ask if scale usage might not also vary. To be certain, it is not just pure curiosity. Many of us have noticed patterns in both qualitative and quantitative research.

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snapshot

The author reports on findings from a test of six studies to examine scale usage by Hispanic respondents.

Developed a test

In order to determine whether scale usage within sub-groups of the Hispanic population is more nuanced, we developed a test using a database of studies conducted over the past three years. We utilized six studies, some with multiple waves, that all contained a single question

In the fine art of research,
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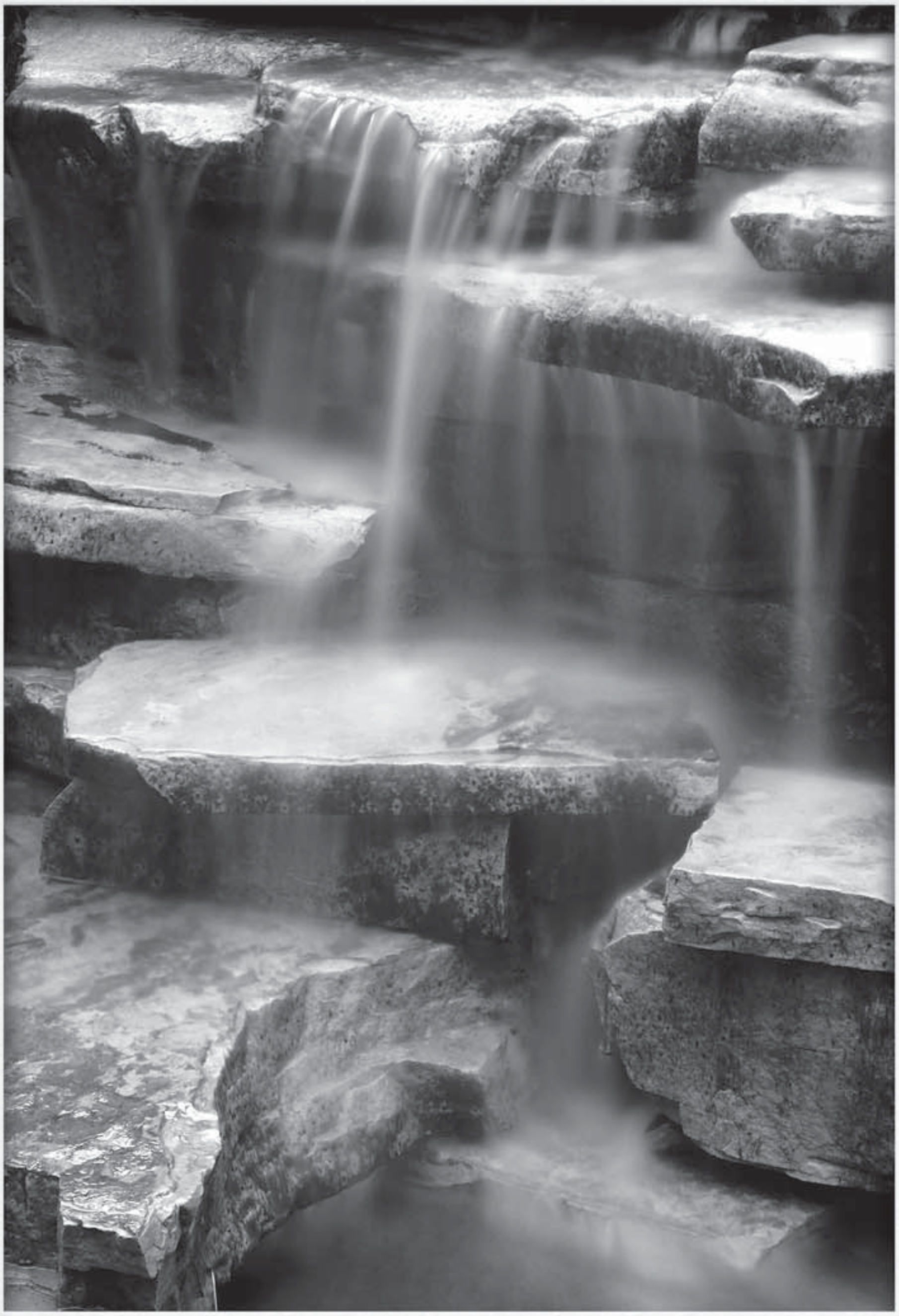

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The Fine Art of Marketing Research

Table 1: Top Three-Box Rating Means

Variable/Category	% Top 3-Box Responses	Maximum Difference
Gender		
Female	58.3%	
Male	52.6%	5.7%
Age		
18-34	54.8%	
35+	57.8%	3.0%
Language Used at Home		
Spanish Only	58.8%	
Spanish More than English	56.6%	
Bilingual/English-Dominant	52.9%	5.9%
Country/Region of Birth		
U.S.	48.9%	
Mexico, Central America	58.2%	
Caribbean, South America, Other	52.1%	9.3%
Time in Country		
U.S.-Born	48.9%	
Foreign-Born, <10 yrs. in U.S.	58.4%	
Foreign-Born, 11-14 yrs. in U.S.	58.3%	
Foreign-Born, 15-19 yrs. in U.S.	59.2%	
Foreign-Born, 20+ yrs. in U.S.	55.9%	10.3%
Marital Status		
Married	57.4%	
Single	53.3%	
Divorced/Widowed/Other	55.5%	4.1%
Education		
Not High School Grad	59.0%	
High School Grad	54.1%	4.9%
Income		
Less than $25K	57.7%	
$25K+	55.5%	2.2%
Study Methodology		
Intercept-to-Internet	54.1%	
CATI	57.9%	3.8%

type. We felt it was very important to limit the potential for extraneous variance, so we included only studies that contained a scale running from 1 to 10, with only the endpoints anchored. The anchors in all cases were "10 means 'applies completely' and 1 means 'does not apply at all'." In short, we used only one specific question type to look for patterns of scale usage among Hispanics and thereby eliminated potential variation as might occur with different scales.

The studies, however, did cross categories and brands, ranging across beverages, auto and retail. The Hispanic samples consisted of males, females, more acculturated, less acculturated, married, single and a wide variety of other demographic characteristics. Some of the studies were telephone-based (CATI) and some were self-administered (intercept-to-Internet). Finally, the number of brands and number of attributes per brand varied across studies. In the end, we had 2,695 respondents and more than 150,000 brand attribute rating points from which to draw conclusions.

We focused on one specific type of response, the top three-box (an 8, 9 or 10), given its widespread usage in analysis of research results. We calculated the percentage across all respondent ratings in any given study that were top three-box scores. While the percentages ran from 0 to 100, the average Hispanic respondent used a top three-box score 56.5 percent of the time in the average study.

We chose to examine the following demographic variables, because they were common across all studies utilized, and we hypothesized that they could be predictors of top three-box usage: gender, age, language used at home, country/region of birth, time-in-country (U.S. residence), marital status, education, income and methodology. Across the categorical responses, it is possible to see variation of top three-box usage.

Only country/region of birth and time-in-country present very large differences in the raw data, but the numbers presented in Table 1 are means. It is possible to imagine that a female, aged 35+, who speaks only Spanish at home is quite likely to use top three-box ratings more often than a male, aged 18-34 who is English-dominant.

The analysis consisted of a simple backward stepwise regression, with the logit of the respondents' top three-box score percentage as the dependent variable. The independent variables were effects-coded. Six variables were eliminated from the model as non-significant: meth-

Table 2: Intercept, Coefficients and Variable Importance Proportions

Variable/Category	Coefficients	Importance
Intercept	0.1756	
Gender		
Female	0.1237	
Male	-0.1237	24%
Country/Region of Birth		
U.S.	-0.2558	
Mexico, Central America	0.3265	
Caribbean, South America, Other	-0.0707	56%
Education		
Not High School Grad	0.1055	
High School Grad	-0.1055	20%

odology (CATI vs. CAPI), age, language used most frequently at home, time in country, marital status and income. This left three variables that are statistically significant predictors of top three-box scores: gender, country/region of birth and education. A goodness-of-fit test based on the chi-square statistic shows the resultant model to be better than the intercept-only model with a 99 percent probability.

We should point out that some of the variables removed do appear to have some effect on top three-box usage. In particular, time-in-country stands out. On closer examination, however, much of the difference in the time-in-country variable comes from the difference in U.S.-born vs. foreign-born, an effect already reflected in the variable country/region of birth. In short, time-in-country does not add much new information once we take country/region of birth into consideration.

It is a small matter to compute the relative importance of each. Given these three variables, the smallest proportion of top three-box scores given would be 42.3 percent and the largest would be 67.5 percent, a difference of 25.2 percent. The importance for each variable is simply the percentage of total variation contributed by each (holding all other variables constant).

The resulting intercept, coefficients and variable importance proportions are shown in Table 2.

Important clues

While we can show significant variation in top three-box usage across different subgroups of Hispanics, our analysis does not explain why. There are, however, some important clues in the data and some aspects of Hispanic culture that may lead us to compose some reasonable hypotheses.

The most significant variable is country of birth, and there are two relatively obvious implications. We assume that the moment of birth and its location are not the foundations of scale usage, but perhaps certain formative years in those cultures are. It could be early childhood, grade school or even secondary school where scale usage patterns are formed. While it makes perfect sense that U.S.-born Hispanics would exhibit scale usage patterns similar to non-Hispanic Americans, it remains an open question as to why Mexican-born and Central American-born Hispanics would be more likely to use top three-box scores than Caribbean-born and South American-born Hispanics.

Secondly, on the issue of country/region of birth, time-in-country does not appear to affect significant differences in scale usage for foreign-born Hispanics. While acculturation is a very complicated subject, it is reasonable to assume that Hispanics, even those living in the U.S. for a very long period of time, do not become exactly like their non-Hispanic counterparts in every way. Some behaviors appear to change relatively rapidly, some slowly and some not at all, since they do not alleviate any tension of living in a foreign host culture. This appears to be a reasonable hypothesis of why scale usage patterns do not appear to shift markedly with time-in-country.

The second most important variable is gender. In fact, in qualitative and quantitative research, this is perhaps the most notable. While it is easy to jump to conclusions regarding stereotypical Hispanic gender roles (machismo and marianismo), we find that these terms are too often misunderstood. In fact, we find that understanding of these terms relies more on caricatures than on the nuanced reality of culture-based gender roles among Hispanics. Still, in research, females are significantly more likely to express optimism, politeness and/or a lack of discrimination of brands and products at the high end than are males. This should certainly be a subject for further exploration.

Finally, education appears to have an impact on top three-box usage on attribute scales, particularly whether respondents have finished a secondary education. Again, why remains an open question. We can theorize that deference (or politeness) due to social status may play a role. Social status in Latin America is often driven not only by income, as we generally think of it in the U.S., but also by education, among other elements. The answer is far from clear and it may just be that less-educated Hispanics are more optimistic or do not tend to differentiate much among brands and products at the high end. Further research along these lines would be very interesting.

Some particular advice

The question remains as to what to do with these observations. In that regard, we do have some particular advice for practitioners of Hispanic research. There are three potential avenues to deal with the knowledge that some Hispanics are more likely to use higher scale points than others: sample management, normalization and use of other question types.

For any wave-based study or study where subgroup comparisons are important, we highly recommend careful sample management. While our preference is to recommend careful quota construction as part of any sampling plan, we acknowledge that costs and timing constraints are often prohibitive. In this case, weighting can be a useful tool, although not without its own pitfalls. At the very least we recommend controlling for country/region of birth and gender. If possible, educational attainment should be considered as well.

We are aware that some practitioners use various techniques for "normalizing" data among

Hispanic respondents. The results of this study are a very poor basis for doing so. Using these results to normalize Hispanic response data on an individual level would result in less differentiation, not more – the exact opposite of the problem that we would intend to solve. Instead, we do believe that these results can be useful to normalize data on a group basis for relevant between-group comparisons or for comparing with norms.

We can encourage multicultural practitioners to utilize other question types that are not so sensitive to scale-usage bias. This study only deals with one type of scale (1-10, anchored) in one application (attribute ratings). It is possible that other scale lengths, such as seven-point or five-point scales, may be enough to shift behavior. Additionally, verbal scales may be more effective in eliciting differentiation among brands, products and concepts. As mentioned previously, other research does indicate that Hispanics in general do have a tendency to utilize extreme points on scales more frequently, but the effects may not be as pronounced.

Finally, practitioners of Hispanic research may choose to skip scales altogether in favor of choice-based respondent tasks. It is not uncommon in Hispanic research to have very little differentiation among brands, products and concepts when measured with scales and have very significant amounts of preference when measured with choices. Even choice-based questions with degree of preference follow-ups preserve a significant amount of differentiation.

Useful indicators

In conclusion, we have shown that top three-box scale usage among Hispanic subgroups can be affected by culture, resulting in non-random patterns of response. We have also shown that three variables in particular (country/region of birth, gender and education) are useful indicators of higher usage. In the end, we have offered some hypotheses for causes of this variation and some advice for avoiding the problems associated with this scale bias.

It is our hope that other practitioners of multicultural research will find these observations helpful in their own work, that customers of multicultural research will use these observation to request more effective study designs and that all readers are inspired to deepen their understanding of our diverse and unique American marketplace. | Q

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More on acculturation

Enter article ID 20060609 at www.quirks.com/articles to read Heidi Dickert's thoughts on the impact of acculturation on Hispanic consumers.

special markets: seniors

By Emily Goon

Catering to their needs

Quant-qual approach helps senior services organization understand how to inform and listen to a crucial market segment

Contrary to the hype surrounding the graying of the U.S. population (see: the Social Security scare of the 2000s), the number of seniors ages 80+ is actually shrinking over the next five years due to a birthrate decline during the Great Depression.

While this fact might elicit a shrug from most marketers, to Ken Paley, it was a wake-up call.

Paley is vice president of marketing at Cincinnati-based Episcopal Retirement Homes (ERH), a not-for-profit senior services organization. Among its offerings are continuing care retirement communities (CCRCs), whose target demographic includes the 80+ cohort. Faced with a shrinking market and aware that ERH needed to develop a branding, positioning and communication strategy, Paley and his marketing team turned to research. Though as they found out, the dwindling 80+ demographic was just one of many challenges they would encounter.

ERH teamed up with Cincinnati research firm StrataMark Dynamic Solutions to conduct a research project regarding the branding and positioning for its two premier retirement communities, the Marjorie P. Lee and Deupree House. While the project was laden with geographic, generational, financial and cultural barriers, ERH and StrataMark successfully collaborated to recruit the right respondent mix; maintain participant happiness and satisfaction; and preserve data quality while gaining valuable insights from this market segment.

Editor's note: To view this article online, enter article ID 20110203 at quirks.com/articles.

snapshot

To conduct research with seniors, two Cincinnati companies collaborated to overcome geographic, generational and technology-related challenges.

Lack of knowledge

What's unique to ERH's situation is the lack of knowledge surrounding continuing care retirement communities amongst the general public. Unlike, say, products such as automobiles or consumer packaged goods, most people aren't familiar with the various offerings available from CCRC providers. For example, while ERH offers a continuum of services, including independent living, assisted living, nursing care and memory support, many consumers would be hard-pressed to articulate the differences among the four levels of care.

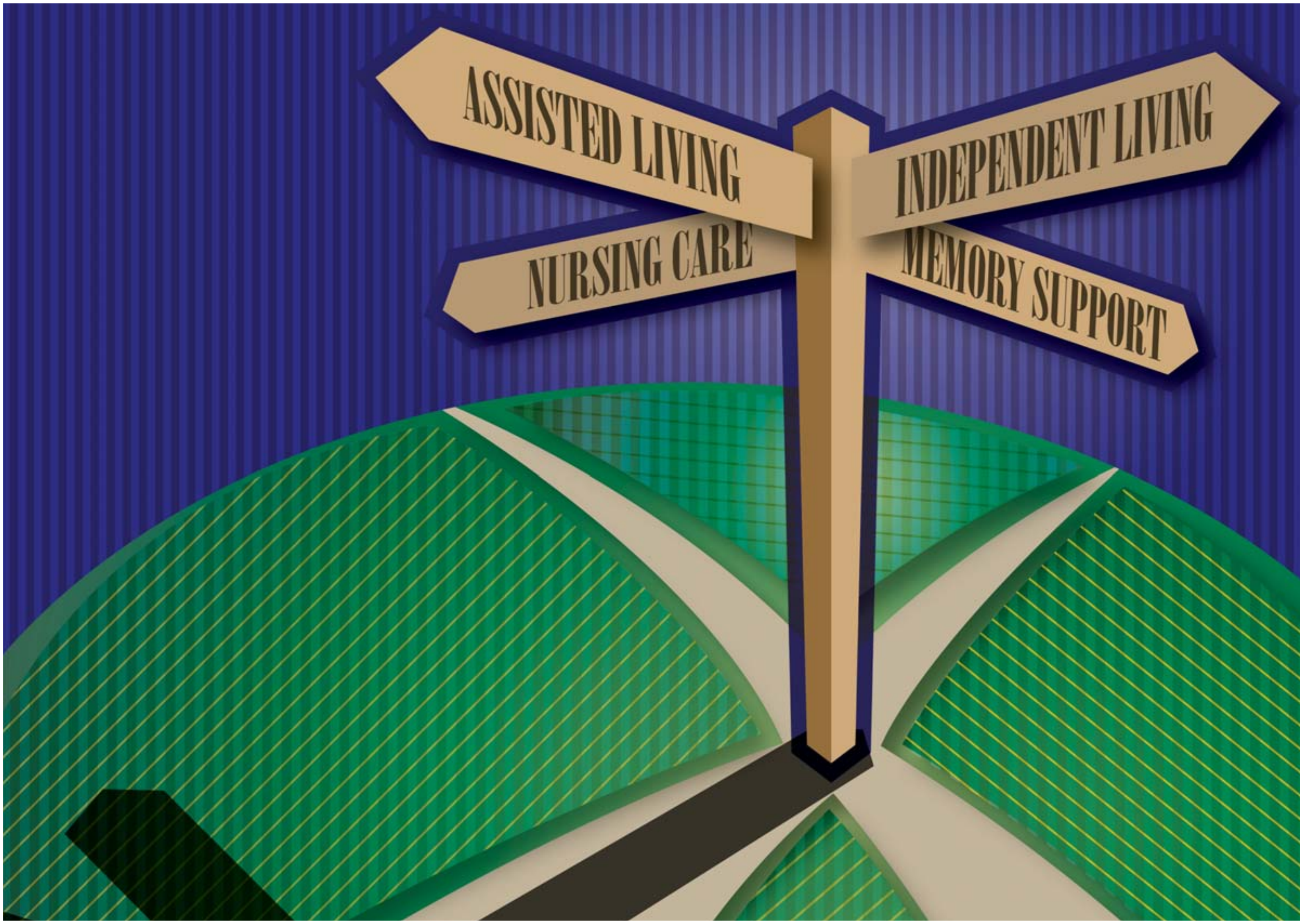
Further, the decision to go into a retirement community is one freighted with emotion, both for the prospective residents and their families. Many seniors accept growing older but worry about losing their independence - rejecting the notion that they might benefit from specialized living or care. Because of this, people who are targets for retirement communities are reluctant to learn about them. "They tend not to want to investigate what they are; what are their characteristics; how much they cost; or even all of the options available in a particular category. They tend not to do their homework until they absolutely have to, and you can imagine what that means," says Joan Schimmel, StrataMark's vice president, client services.

In fact, Paley says, potential independent living residents often don't begin investigating CCRC living until an event drives them to make a choice (i.e., a fall, spousal illness or death, the senior can no longer drive, etc.) or a change in lifestyle becomes necessary (i.e., not enough energy to complete household tasks, outdoor home care becomes too much, desire for more social activity, etc.).

What's more, many people still think of a retirement community as "the home," and they're thinking of a nursing home, says Paley. "A lot of folks feel that they're going to lose their independence when they move to a CCRC and in fact it's just the opposite because you're not worried about waiting for the plumber or driving yourself somewhere. You actually have more independence because you get to do more of the things you want to do without having to worry about the day-to-day burdens of running your own household," he says.

Limited target demographic

As Episcopal Retirement Homes and StrataMark found, another barrier to CCRC research is the exceptionally limited target demographic. Ninety-five percent of seniors never choose to move to a CCRC (not including those who end up in homes in the end stages of life) and most of those who choose CCRC-living are 80+ - the very same group that is dwindling over the next five years. Additionally, for reasons unbeknownst to Paley and



his team, Cincinnati is the third most-saturated market in the U.S. for CCRC availability (following Chicago and Philadelphia). Thus, ERH couldn't risk stagnating in a market flooded with CCRCs and other non-CCRC options (e.g., in-home health care agencies).

One factor in Paley's favor was the admittedly low level of marketing and advertising sophistication in the senior care industry in Cincinnati. Most brochures look the same and follow the same formula, he says: headline; photo of the facility; 10-15 bullet points detailing the features; and contact information.

"There was clearly an opportunity to differentiate ourselves in the marketplace from an advertising standpoint. We didn't have a whole lot of PR going on and we didn't have much awareness in the marketplace. We didn't have any truly distinguishing characteristics that we were promoting and our unique selling points were basically not emphasized. Our Web site, logos and identity systems were all very, very tired, and nothing looked like where these folks perceived themselves to be in the future," says Paley.

Would be essential

In an industry dominated by the use of focus groups and secondary/demographic research, ERH decided that partnering with StrataMark to conduct primary qual-quant consumer research would be essential in reestablishing its positioning and determining what services, benefits and messages were important to prospective residents. As an added bonus, ERH felt confident that going straight to the consumer would deliver insight its competitors weren't privy to.

However, much like the difficulties in the CCRC industry, conducting the research was riddled with challenges of its own - starting with recruiting. "There were some other really interesting barriers to getting good data, given the product," says Schimmel.

The difficulty was finding people who fit all of the necessary criteria: not currently needing assisted living; having the financial resources to get in and stay in; being relatively healthy; and living within the marketing area. The research required 65 men and women in the right age bracket (ages 74+), in the right upper-income bracket who live in their own homes and would consider moving to a CCRC in the near future. If that wasn't restricting enough, this very limited population became even more prescribed by geography: The majority of ERH residents come from within five miles of the community, with few coming from outside of the region.

The geographic restraints were both a blessing and a curse as StrataMark embarked on its phone recruiting. On the one hand, recruiters knew exactly where to look but ultimately had to widen the geographic scope to capture enough participants for the study. StrataMark settled on phone recruiting because it was the easiest way to contact a critical mass of people in an efficient way. Once the respondents were screened and qualified, Schimmel says most people who were invited agreed to participate. One of the ways StrataMark navigated around the stringent criteria was that they allowed for couples to participate, up to a certain point. "I don't think we could have done it without that strategy," says Schimmel.

Provide assistance and oversight

Ultimately, ERH came to decide on StrataMark's Alive methodology - which involves in-person surveys administered to respondent groups who submit their answers using 10-button keypads - through a process of elimination, taking into account the significant physical barriers of the respondent age group. Vision, hearing and comprehension difficulties tend to be more prevalent in older populations. "The whole reason to do it in-person was to provide assistance and oversight. If you are not present to provide assistance, let's say in an online environment, then either somebody can drop out of the survey or - if an online survey allows - they can skip the question or just pick an answer. That creates problems for data quality, obviously," says Schimmel.

Online research also presented a problem because of the age of respondents. "How many people 75 years and older are on the Internet? Not very many," says Paley. While there's buzz surrounding the exponential increase of older generations getting online, "There's a huge difference between a 65-year-old and an 80-year-old," he says.

Telephone research was also discounted. It can become expensive with a very complex set of topics because interviewers frequently have to stop and help. "Moreover, the people who stop and help are professional interviewers, but they're not necessarily people with the knowledge of the topics or the category, so that too can be very risky," says Schimmel.

ERH also opted to pass on mail surveys. While paper surveys can relieve the anxiety around finishing quickly, it is still a self-administered technique without a professional available to provide clarification.

Senior-friendly technology

For Paley, use of the Alive methodology for ERH's positioning project was particularly fitting for several reasons. First, ERH was in search of a qual-quant methodology with senior-friendly technology. Paley also wanted an opportunity to be involved himself and ask follow-up questions immediately. "With traditional techniques, when you get the information back you have lots more questions and have to go back out in the field or figure it out in a focus group," he says.

During Alive sessions, participants sit either classroom-style or at long tables facing a theater-like screen and are given handheld 10-button keypads. Respondents hold the keypads and listen while a moderator goes through a PowerPoint-formatted questionnaire. Questionnaires can include various types of stimuli and ratings questions. The questions are put up on the screen one at a time, and response categories are numbered. Respondents are asked to choose the response most appropriate for them by pressing a number on the keypad. Data is captured in a bay-station database and is also available in real time for observers (usually clients) at the back of the room who watch the results come in on a monitor or laptop. At the conclusion of the session, clients can ask follow-up questions based on the quantitative data in a focus group-like forum.

Between recruitment and the live session, StrataMark and ERH collaborated to develop a questionnaire. ERH shared what it hoped to glean from the research and provided StrataMark with the CCRC details (i.e., services, amenities, pricing options, etc.) to include. StrataMark then designed the survey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instrument by constructing the appropriate metrics, crafting descriptions of important category characteristics and structuring the survey questions to minimize the risk of bias across the many topics included. StrataMark also selected The Health Foundation of Greater Cincinnati as its venue for the study, as its meeting space could easily accommodate 30-35 respondents at each data collection session (alternatively, StrataMark often holds sessions in hotels or conference centers instead of traditional research facilities to host large respondent groups).

Increase the comfort level

Before the ERH session began, the Alive handheld keypads were laid out where participants would be seated and StrataMark explained how to use the devices. Following a brief explanation, the moderator walked the participants through several practice questions. The main goal was to increase the comfort level using the keypads and also ensure that all of the devices were working.

The moderator would ask a series of questions and the tech specialist at the front of the room would let the moderator know when all of the responses were in or if a certain device wasn't functioning properly. StrataMark wanted to make sure responses were registering and gauge how long it would take to go through the questionnaire, given the group demographic.

"If you can typically get X number of questions answered in a 15-minute time frame, you have to double or maybe even triple that with an older demographic, depending on the data collection mode. There are eyesight difficulties. There are hearing difficulties. Sometimes there are comprehension difficulties," says Schimmel.

Overall, uptake on using the equipment was fast, according to Paley. The Alive keypads were especially fitting for the age group. The buttons are extra large and the devices are battery-operated and wireless, which helped with room navigation.

"Sometimes we even swapped out the keypad whether they needed a new one or not just because it sort of seemed like the thing to do, and we did several practice rounds before we really started the research," says Schimmel.

Dispel myths and inform respondents

After the practice rounds, the group was clued in to the topic at hand. As previously discussed, seniors tend to be reluctant in educating themselves on what CCRCs offer and how they compare to one another. A significant amount of time was spent at the beginning of the Alive session to dispel myths and inform respondents about the various services and offerings available with independent-living CCRCs. During the introductory period the moderator would stop at the end of each PowerPoint slide or question and ask if there were any questions, which were addressed by Paley. "You have to spend more time setting up the situation making sure they're all on the same page and have the same concept of what a CCRC is," says Paley.

Going through the questionnaire, the moderator paced the questions slowly. While the speed of the session limited how much could be accomplished in one sitting, it was an expected obstacle. StrataMark also afforded the respondents longer breaks at convenient stopping points during the research to avoid fatigue.

Used the Kano method

The research itself included ratings questions regarding different positioning, ads and taglines to give ERH marketing direction and to measure its ad and brand awareness. Additionally, feature assessment occurred using the Kano methodology, a systematic approach to identify the attributes or features a product or service must have in order to meet customer demand. "Kano helps differentiate what's really important from what is super important so I can pinpoint what the key messages should be," says Paley.

Two main considerations prompted StrataMark's recommendation of Kano over other options for assessing key drivers, Schimmel says: First, brand awareness across the competitive array of retirement communities was very inconsistent, so asking respondents to rate each community on features for use in deriving importance was not possible. Also, the sample of respondents was recruited to be homogeneous in terms of their level of interest in a retirement community, so a behavioral metric such as Likelihood to Consider a Retirement Community could not be utilized properly in a traditional correlation or regression-based key driver analysis.

In addition to the Kano exercise, respondents also explicitly rated each feature. These ratings data provided something to which the Kano results could be compared. In ERH's case, the results of both matched up with no inconsistencies. Attributes that looked like delighters in the Kano portion were also those that received the highest scores in the straight ratings exercise.

Qualitative component

The qualitative component of the research came at the very end of the Alive session. Paley formulated questions based on the data gathered during the quantitative portion and asked follow-up questions immediately for more depth and clarification. He encouraged participants one-by-one to shout out responses. He then repeated an answer for the entire group to hear and asked participants to respond on a 10-point scale how much they agreed or disagreed with the sentiment expressed in the response. "During the question portion at the end of the session, we could ask a qualitative question and instantaneously quantify it, then we knew if we had something meaningful and relevant or not," says Paley.

Time, patience and willingness

Conducting research in a challenging industry with a challenging demographic is no small undertaking. It requires the time, patience and willingness to carefully select the right techniques and methodologies to achieve prime results.

In ERH's case, its thoughtful approach allowed it to gather several actionable points from the research that drove ad campaigns and changed messaging and taglines, says Paley. The findings also verified prospective positioning initiatives and provided insight on introducing new services.

Even when marketers aren't faced with problems like those encountered by ERH and StrataMark, a strong client-provider relationship is crucial in communicating what the research barriers are and how to work through them. In the end, as ERH found, true collaboration will yield invaluable advantages. | Q

special markets: women

What does a woman want - online?

Comprehensive study uses research to do Sigmund a solid

By Nima Srinivasan
and Edwin Wong

Much has been said and written about the complex, capricious nature of women. As Sigmund Freud famously said: "The great question that has never been answered, and which I have not yet been able to answer, despite my 30 years of research into the feminine soul, is 'What does a woman want?'"

So should we care to understand why they do what they do? Can we succeed where Freud failed? Do women need anything beyond diamonds, flowers and babies?

The simple answer to all these questions is "Yes." Over the next decade, women will control two-thirds of consumer wealth in the United States and they currently account for 85 percent of all consumer purchases (Source: She-conomy). The sub-groups within the broad segment of women (working women, moms, mom bloggers, Boomers, high net worth women) are all high-priority targets for marketers.

This article will examine findings from our Connectonomics study, which explores women's fundamental needs, how they use online channels to meet those needs and where they are most receptive to marketing messages. The research highlights a new approach to online portfolio management that distinguishes online channels not by their functionality but by the needs they meet and their potential to engage women.

Knowing what women want, where they go online and how receptive they are to ads could result in a better return on marketing investment. Marketing effectiveness, we could say, is a function of target needs, online channels and openness or receptivity of the target. Connectonomics helps decode each of the three variables in this faux-equation:

Marketing Effectiveness = f (Target Needs + Online Channels + Receptivity to Marketer Messages)

snapshot

A report on findings from the Yahoo!/Added Value Connectonomics project, which examined how women use social media and other Web-based outlets to grow, share, shop and explore.

Penetrate this façade

Social commentary perpetuates many female stereotypes and this becomes the backdrop in which women have to operate. It's one of the factors that shapes who women are and what they aspire to be. Our understanding of women had to penetrate this façade and unravel what lies beneath. It needed to identify what really made them feel happy or sad, empowered or vulnerable.

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Any way you slice it, our data is always right on the mark.

Figure 1: Today's Woman

Who I am: Pressures of societal expectations make it easy for women to be aware of their flaws. This could be about how they look, dress, weigh, think, achieve, the skills they have, etc. But the key driver for women is self-improvement, not an obsession with their imperfections.	**What I think:** Women are well networked - the popularity of social networking sites, among women in particular, demonstrates they know how to use such forums to their advantage. But women go online also to find information and resources to help them make better decisions. It's not always about shopping or frivolous exploits.
How I feel: Women have not only found a support system and resource center online, they also connect with others who have similar problems, concerns and insecurities. This has told them that it's okay to be vulnerable or imperfect. It's also not selfish to address one's own needs. This evolution contrasts very clearly from the "perfect housewife and martyr" avatar of the 1950s.	**What I do:** These changes in how a woman sees herself - her strengths, weaknesses and goals - have naturally led to a slight reorientation in how she defines what she does. Women prefer not to pigeonhole themselves into labels that have been pre-ordered by society like "full-time mom" or "wife of…." As they cater to their needs for self-expression, development and the rest, they are more likely to use interests, hobbies and skills to define who they are.

We had to figure out what women really wanted.

The study was designed to be comprehensive and account for all perspectives – consumers, experts and marketers. We used a sequential, multiphase research approach (see sidebar) so that each stage could build on previous learning.

Eleven communication channels/content sites were studied: women's lifestyle sites (Yahoo! Shine, iVillage, SheKnows, etc.), special interest sites (CafeMom, BabyCenter, etc.), social networking sites, Twitter, e-mail (for personal use), blogs, online community groups, message boards, instant messaging, review sites and local groups.

Evolving constantly

The role of women and what they do is evolving constantly. As detailed in Figure 1, today's woman is aware of her challenges and does not seek to be a flawless superwoman as some of her predecessors aspired to be. The Internet now provides access to information, answers and a sisterhood that women did not have before. They use this as a tool to build identities and resolve insecurities.

Women are very conversant about the different online applications and sites they use – e-mail, message boards, Facebook, CafeMom, BabyCenter, etc. The reasons they use these outlets are just as diverse – to connect with "people like me," to find out information, for fun, to escape, to talk to another adult.

The 30-minute interviews (see Step 2 in sidebar) were used to dig beneath the obvious needs such as "to connect with friends" to unearth subconscious needs like belonging, validation and self-improvement. In the quantitative survey (Step 3) consumers evaluated simple statements heard in the interviews such as: be confident; be relaxed; be smarter; be exposed to other points of view; express frustrations; and be provocative. Respondents indicated the extent to which they identified with each statement. Their responses were factor-analyzed to yield need states shown in Figure 2.

Needs that drive women fall on a spectrum that has inner-directed personal growth at one end and outer-directed validation at the other. The other aspect that defines women is their willing reliance on others and finding strength by connecting with others rather than self-reliance alone.

Some needs are more prevalent than others and cluster in the top-right-hand corner of Figure 2 and quite accurately portray what women want:

- Repair and Healing (a need to recover from feeling vulnerable);
- Mutual Sharing (sharing and bonding over experiences, concerns, feelings);
- Release and Escape (break from the usual, vent frustrations);
- Improve Myself (educate self, grow professionally);
- Affectionate Closeness (be close to people);
- Care of Self (invest in personal interests and needs to become a better person);
- Bargain Hunting (save money); and
- Be Enabled (be efficient, productive).

The need to be fiercely independent without relying on others or be provocative is a less prevalent need for women.

More strongly than others

We know women have various need states, use many channels and all or most of them are consumers. This study helped illustrate how some channels deliver on certain need states more strongly than others.

Some of the current commentary on Facebook portrays it as an informal but popular forum that encourages narcissism, self-promotion and a need for validation. Is it really that shallow? Or is there more to it? And what about the other channels that are less widely discussed and profiled – the ones that don't get their own Hollywood movie or a *Time* magazine nod? Are they any less important in the context of what they deliver to women?

We may have preconceived notions on which of these channels delivers what, but as we dissect this complex ecosystem, some of the actual dynamics deviate from what

Figure 2: Women Use Their Networks for Personal Growth

may be widely believed. Each of these online channels delivers on some of top need states for women.

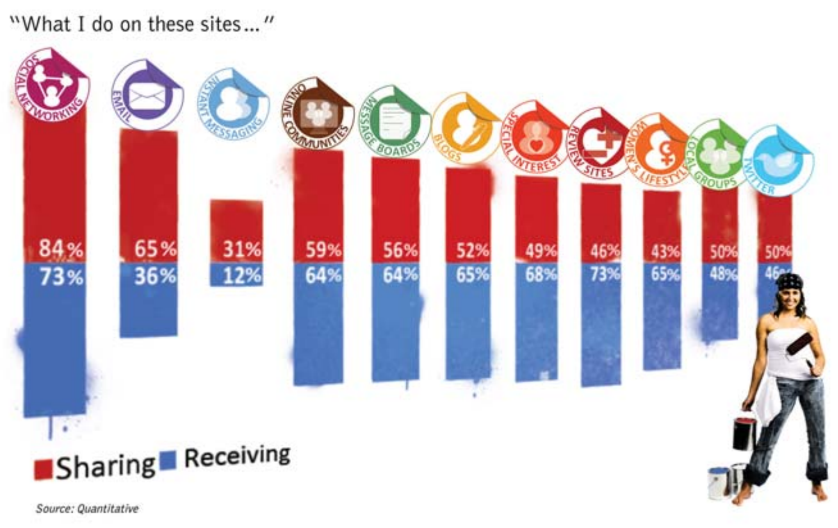
Women's lifestyle sites (Yahoo! Shine, iVillage, SheKnows, etc.) deliver strongly on almost all need states, which explains why certain women-centric magazines work so well for women. They may not always support a great deal of content creation, but they are about helping women be more satisfied human beings and consumers. Some of the needs satisfied: Care of Self, Bargain Hunting, Improve Myself, Be Enabled.

Special interest sites might be about a niche interest but are hugely relevant to consumers and deliver on most of the top need states. They facilitate sharing and a sense of release and escape (e.g., scrap-booking or DIY sites). Focusing on a specific interest also provides validation and a sense of being the best and in control. Sites like BabyCenter and CafeMom also offer Repair and Healing when one can talk about personal concerns, problems and failures.

Social networks clearly demonstrate an informal, communal, news and information sharing platform. This is where people go to hang out and broaden perspectives. Its relevance in a shopping context is weaker (low on Bargain Hunting). Needs satisfied: Care of Self, Affectionate Closeness, Mutual Sharing, Release and Escape, Broadening Horizons, Be In The Know.

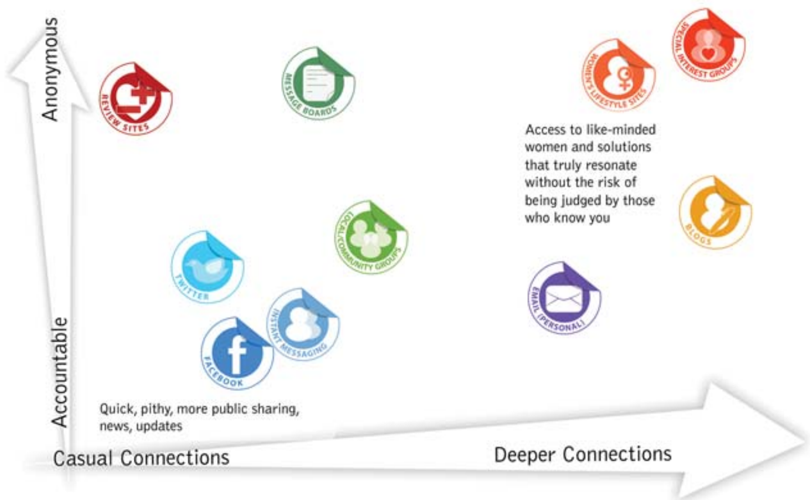
Twitter works for a small group of women but for this minority it is a huge draw. It brings out the

Figure 3: Understanding the Dynamics of Info Exchange



Source: Quantitative

Figure 4: What Do the Online Outlets Provide?



Source: Qualitative

more competitive, provocative, alpha-dog streak in women, specifically bloggers. A strong need to be acknowledged also pops, which is heightened among bloggers. Needs satisfied: Care of Self, Affectionate Closeness, Mutual Sharing, Release and Escape, Broadening Horizons, Validation, Be In The Know, Being The Best, Social Currency, Pushing The Limits, Up The Ante.

E-mail use is prevalent, hugely relied upon and helps women feel close to what matters and in control. Needs satisfied: Care of Self, Be Enabled, Affectionate Closeness, Mutual Sharing, Release and Escape, In Control.

Instant messaging, not surprisingly, is very weak on most need states and delivers primarily on Mutual Sharing alone.

Blogs allow for introspection, improving self and sharing. They also help followers/bloggers to be in the know and push limits – driven by the ability to question and discuss societal norms. Needs satisfied: Care of Self, Improve Self, Mutual Sharing, Be In The Know, Pushing The Limits.

Online communities can foster a close-knit and engaged group and within this forum there is potential to satisfy all the need states. If you are not part of an online community group, you may feel nothing for it. But for women who are a part of a group – like a mommy group, car lovers or Harley-Davidson Owners Group (H.O.G) – this channel very effectively taps into helping them identify with who they are, what they want and what they love to do.

Message boards help users focus on themselves – the burning questions, problems or concerns they have. As with blogs, the less-prevalent but somewhat wilder, possibly anti-establishment need states are addressed as well. This is evident in the tone of some of the more contentious, provocative comment threads seen in this forum. Needs satisfied: Care of Self, Improve Self, Mutual Sharing, Release and Escape, Broadening Horizons, Repair and Healing, Be In The Know, Social Currency, Pushing The Limits, Up The Ante.

Online review sites are very effective in delivering not just the top need states but also deliver on Control – helping consumers feel like they know what they are doing and what's going on. This can be very critical in a cluttered, overwhelming world of brand and product options. This is one of the few channels that facilitate Bargain Hunting – a top need state.

Local groups like online community groups draw in an engaged crowd who get a lot from this channel, but this refers more to the local level – nearby school or church groups. It taps into the need to build a better community, which provides meaning and purpose.

Enable social connections

Most articles on social media best practices tend to talk about Facebook, Twitter or some obscure emerging technology. Interestingly, women see social media as all online channels that enable social connections or sharing, not just the much-hyped duo of Facebook and Twitter. E-mail and social networks are used most widely and frequently. But as seen from the needs+channels equation it's clear that these aren't the only two ways of reaching out to women.

Women in the groups (Step 4 of the research) drew a map of their online journeys. These indicated not just the paths they take but also how they pull information from one source and share it somewhere else or build on it or comment on it. A function of "Sharing" was defined to reflect creation of content, sharing opinions, sites and videos and "Receiving" to represent consumption of content.

All online channels facilitate both Sharing and Receiving (Figure 3) - some more proficiently than others. Social networking, e-mail and IM facilitate more sharing, while the rest either promote more receiving or are equally matched. This dynamic provides an idea of how each channel is being used and what it does: facilitates creation, provides information, helps decision-making, etc. Receiving is what informs many important decisions. The role of content becomes clear since that's what draws the target in, engages them and keeps them coming back for more. Social networking enables a lot of sharing but is used less for receiving.

Women's lifestyle and special interest sites are critical when looking for more sensitive information that might require the user to maintain their anonymity - something that allows them to be vulnerable. Facebook or social networking is about projecting their ideal self - the best photos, achievements, etc. To air out and resolve their problems, they preferred the shroud of anonymity offered by content sites.

The conversation in digital marketing is often about one channel becoming obsolete and the emergence of the next big trend. What's clear from the range of channels used and how women said they use them in the research is that it's not so much about replacement as much as about portfolio management from the consumer's point of view.

Channels like Twitter and Facebook are seen as sources of casual connections that are more public and transient. They are great for trading information, getting news and updates. But these channels do not deliver on all the need states that are important to women. Mutual Sharing, Release and Escape, Improve Self, Care of Self - these are all about personal improvement and overcoming challenges. Something more personal that reveals vulnerability - concern about whether a spouse is cheating, a child that's acting out, body image or health concerns - is generally not for public sharing. This is where women seek out a forum or channel that's more private, even anonymous, where they can seek empathy, assurance and solutions. For this they turn to special interest, women's sites or blogs - there is a deeper emotional investment here.

The anonymity becomes important when they are that vulnerable because it is a safe haven where they cannot be judged and yet find others who face the same issues and possibly solutions for how they overcame these problems (Figure 4).

While women are more ready today to embrace their flaws, they still want to focus on self-improvement. There is a need to come across and be acknowledged as being in control (for the most part) especially in forums like Facebook. Sharing instances or photos of personal success - involving their kids, a recent vacation, a great new recipe - is a public celebration coupled with some need for validation. But when it's a time to heal or resolve issues that bring them down, they turn to a more

The research behind Connectonomics

The techniques and thinking that drove each stage of the Connectonomics research were designed to produce a fresh, deep, accurate and relevant picture of women's online connections.

Step 1 - Knowledge assessment: current research recap
Review of 20 women-centric studies and articles in the past year, to understand current thinking on women's attitudes, motivations, behaviors and online media usage.

Step 2 - Needs-harvesting: Insight collection from multiple angles through one-on-one exploration
The process yielded a wide range of "needs" statements in simple consumer language.

Consumer perspective: Twenty 30-minute interviews (dipsticks) among women of various demographic backgrounds gave researchers a window into what online channels they use and why they use them. The majority of these interviews were conducted over the phone to give the women the security of not being judged and to get at core needs, aspirations and complexes.

Contrast perspective: Five 30-minute interviews were conducted among men to isolate insights that stemmed from gender differences, rather than other demographic variables like age, occupation, life stage, etc.

Expert perspective: Five 30-minute interviews were conducted with bloggers, industry insiders and online content experts to add more dimension to the story.

Step 3 - Quantitative validation: Understanding needs, channels and receptivity across a broad sample of 3,000 respondents
Needs-cluster generation: Needs responses were factor-analyzed and scored at the respondent level with scale-effect removed to yield highly correlated need states that accurately reflect motivational drivers for women today. An augment of mommy-bloggers was included to study this high-priority subgroup.

Contrast perspective: An audit of 500 men was included to attribute findings to gender.

Step 4 - Contextual exploration: Mini-groups in Denver and New York City to get group dynamic (since the sisterhood equation or relying on others is critical to women)
Needs exploration: Specific need states were explored further to get motivational, behavioral and reaction audits.

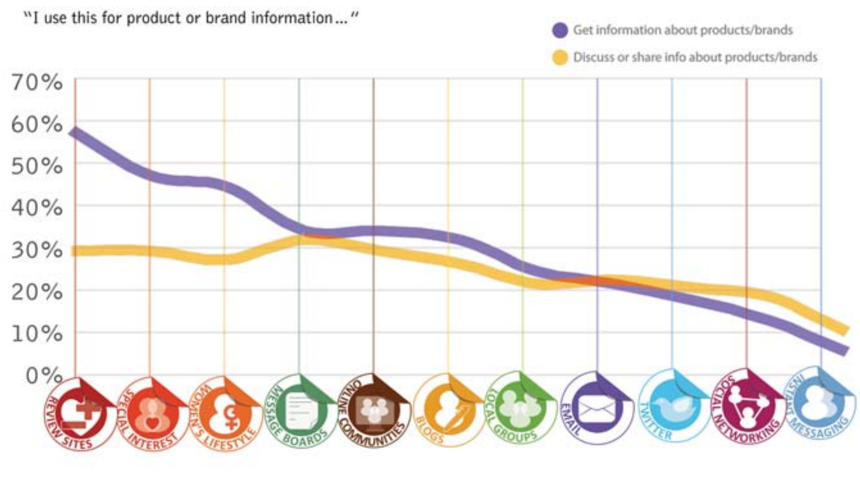
Connections exploration: The connections or bridges between need states, channels and receptivity were established using qualitative tools like metaphor cueing, online trawling and projective techniques.

private sisterhood. In the research, even women who have healthy relationships with their mothers, sisters or girlfriends did not always want to discuss their personal insecurities with them. Frustration over staying at home and not being able to work, for instance, is something that's better resolved by talking to other stay-at-home moms in online forums rather than those known to her, who may judge her more critically or offer unsolicited/unwanted advice.

Anonymity and personal relevance are of tremendous importance to women and speak directly to key need states. A lot of the conversation on digital and social media marketing is about how to get consumers' attention on Facebook or Twitter. In the research, women said they are least-receptive to ads on Facebook - because they liken it to a bar or a social space which is about fun and a brand encroaching in that space feels disingenuous.

Content-centric sites like

Figure 5: Brand and Product Sharing Happens Most in Content-Driven Sites



Source: Quantitative
Base size: Men n=690; Women n=2,581; Mom Bloggers n=496

women's lifestyle, special interest and online review sites garner higher levels of engagement. The audience is there because they find interesting, relevant content. This is where they are more likely to find information on new products or anecdotes that helped them make purchase decisions (Figure 5). Ads or promotions tied into that content feel more organic than forced. Not surprisingly, they are more receptive to ads on content sites. Content-centric sites have far more impact through the course of the purchase funnel and opportunities to use the social media component of these sites should be harnessed.

While social networking sites may be used to spread news, info and personal updates, it's women's lifestyle sites, special interest sites and online review sites that are relevant and impactful marketing channels from the female target's perspective.

No silver bullet

It's no surprise that there is no online silver bullet. Many of the online channels can be used successfully in a marketing context. Connectonomics provides some clues on how to optimize messages and placement. It helps illustrate the needs that matter to women, how different channels deliver on them and how receptive women are on each channel. Accounting for these three aspects could help amplify results and return on investment.

The study helps decode the complex interplay of need states, receptivity, receiving and sharing that plays out on each of the 11 channels. To close, here are some of the main takeaways.

Needs

Key findings

- A comparison of the need states of women revealed that age, life stage, occupation and the presence of kids do not result in radical differences in need states. At this basic, deeper level, they are more similar than different.
- Understanding need states is key to knowing women's motivations, drivers and what they really care about.

Action items

- Think in context of need states to ensure messaging hits the right notes to yield brand and product promises that truly resonate with the target.

Channels

Key findings

- Think about who and what she is connecting with, what she is sharing and how often she uses it.
- Different channels deliver on different need states and women use a mix of channels and sites to fulfill these need states.
- Content sites have deep appeal for women and deliver strongly on many need states. The shroud of anonymity enables deeper, more delicate conversations.
- Social networks facilitate a lot of sharing and staying in touch but they are not seen as the most ideal space for advertising and marketing messages.
- E-mail continues to be one of the stronger channels in terms of usage and a great channel for content-sharing.
- Online review sites have significant impact in shaping consumer decisions as well.

Action items

- Understand how each of the online channels work to ensure more effective advertising placement, content sponsorships and different kinds of consumer sharing.

Receptivity

Key findings

- If the consumers are more receptive to marketers on a channel, ads there are bound to be more effective.

Action items

- Currently, review sites and content sites appear to be some of the strongest channels in helping consumers through the purchase journey.
- It's important to note that the implication is not that effective ads can never be made on Facebook but knowing the audience, their mind-set and receptivity there can only help create more effective ads and promotional messages. This is a great forum for ads targeted at loyalists or enabling an ongoing dialogue with the brand if the brand has a steady stream of "new" news. | Q

Help her, help you

For tips on how to tailor your research to match women's requirements, enter article ID 20050205 at www.quirks.com/articles.

special markets: families

No longer a party of one

Rethinking how we research and market to families with children

By Wynne Tyree

Traditional models for understanding consumers have been focused on analyzing individuals' lifestyles, values, preferences and behaviors. Regardless of the target group, manufacturers, service providers, content developers, advertisers and media buyers have created an elaborate sales and marketing system based on the assumption that individuals make marketplace decisions. Likewise, the research community that supports these marketers has been focused on dissecting human behavior one person at a time - whether represented by eight women in a focus group or 1,000 Hispanics completing an online survey.

But what happens when one person doesn't make the final decision? Or when one person makes the decision but a second person makes the purchase? Or when three or more people come together to negotiate needs and desires and to evaluate the potential risks and benefits to the group? When a complex matrix of emotional and functional variables is at play across individuals?

In short, it requires that we reconsider "1" as our standard unit of analysis as researchers. It requires an acknowledgement that the "viewer" may be two co-viewers - each with unique needs but a shared desire to be entertained alongside the other. Or that the target "consumer" may in fact be five co-consumers … literally sitting at the same table, with financial and emotional desires to co-consume but palates and developmental needs as distinct as Pop Rocks and a fiber bar.

Understanding contemporary families with children necessitates this paradigm shift. Effectively developing for and marketing to families means that classic marketing and research models simply may not work. The interdependence and egalitarian nature of today's families arguably makes the study of "moms" or "kids" alone a futile pursuit. After all, to understand a mom is to understand her child; and to truly know a child requires being a student of the parent(s) as well.

These insights led my firm to launch the Young Love study in 2009. Originally conceived as a way to help demystify kids' perceptions and usage of brands, the study quickly morphed into an investigation of modern families, the brands they love and why. This article will draw on the recently released year-two findings from more than 4,500 families.

snapshot

Rather than focus solely on how a kid or a mom would respond to their product, marketers should consider the family unit as a whole and craft messages that communicate inclusiveness, variety, ease of use and value.

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Data from the online study of kids 6-12 years old and their parents is evaluated at the individual level as well as the household level. What the data on more than 270 brands across 20 categories clearly show is that several key variables drive families to develop higher affinity for and usage of brands. These drivers of family brand success include:

Family Rank	Brand	Kidfinity Score (Of a possible 1,000)	Momfinity Score (Of a possible 1,000)
1	Wii	907	877
2	M&M'S	884	894
3	Disney Channel	880	867
4	Disney	854	888
5	Doritos	871	870
6	Oreo	877	860
7	Crayola	834	900
8	Popsicle	870	861
9	Reese's	852	860
10	Goldfish	833	869
11	Chips Ahoy!	856	839
12	McDonald's	898	796
13	Nintendo DS	873	820
14	Nickelodeon	855	829
15	Kraft Macaroni & Cheese	828	850
16	Capri Sun	848	827
17	JELL-O	818	854
18	Toys"R"Us	845	824
19	Cheetos	844	825
20	Pringles	845	819
21	Subway	789	873
22	Twix	814	847
23	Starburst	823	833
24	Skittles	835	811
25	Fruit Roll-Ups	831	812

Family Rank is calculated via the summation of Kidfinity and Momfinity scores.

Bringing the family together
Today's families are incredibly fragmented due to work, school and extracurricular commitments. At the same time, products are highly individualized and media is more personalized than ever. With seemingly-infinite forces and brand opportunities pulling them apart, Young Love results reveal that what families want most is to connect with the ones they love and miss: one another. It is the reason Nintendo's Wii is the No. 1 Family Delighter brand for a second year in a row. Wii physically and emotionally brings families together regardless of age or skill level. Like Goldfish (No. 10), Disney Channel (No. 3), and Crayola (No. 7), Wii masterfully invites the whole family into a safe, easy, permissible and shareable brand experience.

Delivering variety/choice
From flavor varieties to online game choices, options mean that kids and parents don't have to leave the brand portfolio to stay personally fulfilled. Variety also results in everyone in the household feeling like the brand offers something for them. On a practical level, moms' lives are greatly simplified by delighting the whole family with one brand selection. While kids find choices empowering (think Subway at No. 21), moms and dads find that variety offers greater peace of mind. Knowing that everyone in the home will be happy with at least one of the brand's offerings is why brands like Doritos (No. 5) and M&M'S (No. 2) achieve Family Delighter status.

Making it easy
One of the core drivers of both Kidfinity and Momfinity - the study's measures of kid and mom brand affinity, respectively - is "easy to do/make/use." Allowing kids to easily interact with a brand is critical to marketers, as it helps ensure brand engagement and adoption. From offering pop-top lids on products tweens can microwave themselves to developing simplistic, icon-driven user interfaces for digital products, developing for a nine-year-old goes a long way in securing family brand success. Moms seek brands that make their lives easier, including offerings that kids can make or use on their own. Kraft Macaroni & Cheese (No. 15) is a great example of effectively pushing the "easy" lever. Nintendo DS (No. 13) is another example of how smart brands connect with non-traditional users (in this case, gaming girls and parents) and bring them into the experience.

Speaking to the whole family
Data from our study show that delivering communications (or even cues) that assure both parents and kids that a brand was designed with both of them in mind results in the whole family feeling as if they are invited to the brand party. This can happen via dual-targeted marketing campaigns such as Disney Channel (No. 3) or it can happen via adult-directed general-market efforts that subtly say to kids "We know you're listening." Such is the case for brands like iPod (No. 28) and Oreo (No. 6). As 50+ years of kid-directed marketing has evidenced, kids want to be part of the brand dialogue and they have brand preferences. At the same time, parent-directed communication helps ensure regular access. Interestingly, at the household level, access and frequency of use ultimately reinforce affinity for both parents and kids, so directly or indirectly communicating with everyone in the family is imperative for garnering brand love.

Being cognizant of financial constraints
Families are watching the bottom line these days and kids are more aware

than ever of their families' financial situations. Value – which doesn't equate to low price alone – is important to parents and kids as well. While moms and dads continue to tighten their belts, kids want to do their part to help their families save money, too. This is why value-based brands like Walmart (No. 30), Popsicle (No. 8) and Kool-Aid (No. 29) continue to grow with families. Family members are looking for the recognition that a brand "gets me and what's important to me now." It's one of the many reasons a brand like Old Navy (No. 74) continues to trump premium brands like Abercrombie & Fitch (No. 196) and Hollister (No. 207).

Leveraging brand heritage

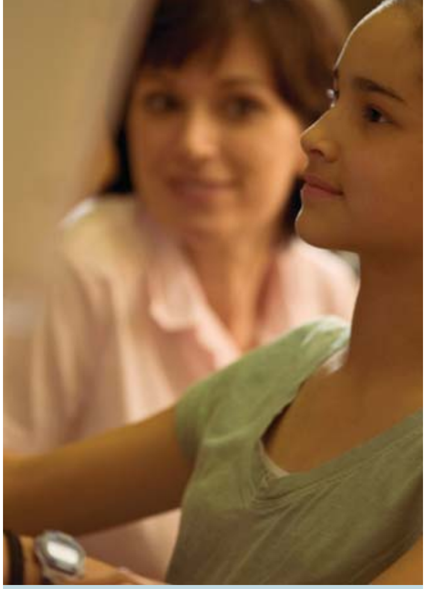
Kids and parents want guarantees – whether a guarantee that dad isn't wasting $10 on something that will disappoint the family or a guarantee that a kid will like the flavor her mom has put in front of her for breakfast. Brand names can deliver this guarantee. They provide the "I know and can trust this experience" factor that both parents and kids seek. It is one of the key factors in moms visiting the same McDonald's (No. 12) drive-thru on a weekly basis. And it is why kids robotically press the numbers for Nickelodeon (No. 14) on the remote control when they turn on the TV. Contrary to popular wisdom that kids lack brand loyalty, young consumers gravitate to brands they know and can trust. Likewise, moms love sharing with their kids the brands they grew up on and still enjoy. Tapping moms' nostalgia and giving families a heritage-based "guarantee" of cross-generational delight is a surefire way to secure brand affinity and usage.

Understand and measure

The brands that will reign with kids and moms in the next decade will leverage the insight that they are part of an intimate, symbiotic family unit. Successful brands will ensure parent approval and facilitate quality time with immediate and extended family. As an industry we need to continue to explore ways to understand and measure this complex family infrastructure and the web of unique and interrelated needs that define it. | Q special markets: kids

Keep the lines of communication open

Guidelines for easing parental fears regarding online research



By Pam Goldfarb Liss

A recent Kaiser Family Foundation study says an estimated 90 percent of kids ages eight to 18 spend on average over seven hours a day online. This means that in the U.S., kids in grades three through 12 are currently using the Internet for most of their waking hours not in school.

This generation actively shares its ideas online and is comfortable with being heard in aggregate, making them ideal candidates for market research online. This openness beckons the researcher to help create a safer atmosphere online - something that is important to both the child and their parents.

While conducting online research with kids is a gold mine for our industry, there are still a few rules of the road we need to adhere to as we respect children's unique privacy rights in the Wild, Wild West that currently exists online. This respect is essential for all researchers because our success hinges on earning the trust of and garnering insights from child respondents and their parents.

As market researchers, we must interpret still-evolving laws (such as the Children's Online Privacy Protection Act [COPPA] in the U.S. and Safe Harbor laws in the U.S. and E.U.) that request marketers to identify the source and purpose of the information provided online. Even though these laws are more tailored to the great number of marketing and sales-oriented gimmicks offered online, market researchers can respect the important lines they are drawing in the online sand by establishing and enforcing these rules in recruiting and communicating throughout an online research project.

These rules are common sense to most, but you'd be surprised how many of us recruiting and conducting research with children don't take the following simple steps to assure the rights of kids and parents.

Recruit with the personal touch. Use traditional recruiting methods to bring children into your online qualitative projects. This includes making sure to talk to their parents first, and then screening the children who will be participating. When using an established online panel of children, ask how they were originally recruited and if there is an opportunity to communicate the project's purpose with a parent prior to employing the survey. Your information could be suspect without this process, as the faceless world of online allows for a great many abuses. Recruiting respondents with extra care will give you greater con-

snapshot

When interviwing kids online, researchers can take the steps outlined here to reassure nervous parents that family privacy is being respected and that the online research process is safe.

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MARKETING SYSTEMS GROUP

text for the people participating and help understand more deeply what is behind some of the answers. As researchers, it is often the context that provides greater insight than the actual answer.

Get parental permission. Parents must provide handwritten approval for all projects I complete with children - whether in person or online. My permission slips include information about the project scope and an overview of what we will ask of their children. This helps comply with the basic outlines of both the COPPA and Safe Harbor laws.

Encourage mom to participate with the under-12 age group. According to the COPPA laws, children under 13 are a gray area for marketers, in general requiring all online promotional games and programs targeting this age to request parent participation. I encourage the same protocol with children online. The opportunities for market researchers are exciting because mom and child can participate in exercises examining purchase behaviors, decision hierarchies and testing new products together, giving us insights into the parent/child push-pull that occurs naturally when product discussions occur.

Using online tools such as a Webcam interviews, the researcher can talk directly to both mom and child about decision hierarchies or new products as they sit comfortably in their home. Texting with moms and kids in the 10-to-12-year-old age group during a shopping excursion is another great way to examine decision hierarchies or purchase behaviors in context. These can be further refined with hybrid projects that incorporate in-person or online focus groups that divide the moms and child to discuss separately, using the online exercises to prime both groups for very fruitful discussions in the focus group room. Since a hybrid method might use online qualitative tools before an in-person focus group, kids are more comfortable with the subject matter. Using a variety of tools, one can evoke some very exciting input from kids who may have otherwise been shy in a traditional qualitative method interview.

Recommended Process	Notes
1) Recruit with the personal touch	Using traditional recruiting methods online, connect with parents first and then recruit the child. Check with your recruiter and panel provider about their methods for recruiting children online.
2) Get a parent's permission	Make sure to have parental signed approval for all projects with children that identify you as a researcher, explaining project scope and context fully to comply with U.S. COPPA and E.U. Safe Harbor laws.
3) Encourage a parent to participate	Especially with the 8-to-12-year-olds, a parent's interaction in some of the project can add greatly to the insights.
4) Make ongoing calls to check in	Connecting with a personal phone call at least once during an online project with children will put parents at ease.
5) Seed the ground for the future	Foster a long-term relationship with the brand or company you represent by encouraging a multi-phased or hybrid project with children who are great brand advocates and naturally honest consumers.

Make ongoing phone calls to check-in. Because kids are very comfortable online, and moms and dads are not, employ a periodic, friendly phone call to check-in and allow respondents to identify any concerns with the exercises or activities. Comfort mom or dad that you are respecting their child's contributions. This small gesture gives a parent a sigh of relief that the online study their child is participating in has a real person protecting their child on the other end.

Seed the ground for the future. Bring mom or dad into the process with an online solo project or a hybrid mix of online and in-person qualitative and foster a long-term relationship with the brand and the family. If the project started with a concept testing, a brand might work with recruiters and the researcher to keep this online community of children engaged through to new product testing and ad checks. Immersive techniques such as online journaling for category explorations, texting during shopping excursions and cell phone video or photos add to the opportunities to better understand family lifestyles through a kid's eyes.

Privacy is top-of-mind

Online privacy is certainly top-of-mind these days, and not just in the marketing research realm. Missteps by Facebook and Google have shown parents the importance of staying on top of privacy - their own and that of their children. Facebook changed its privacy settings, which riled parents who were already on edge about what their children are sharing online. It is unclear what legal measures may be taken, but many parents were said to be stopping children's Facebook pages until they understood the new privacy settings. Google revealed its Big Brother-like abilities to see inside your e-mails and Web transactions. This was an unintended byproduct of Google Maps in Europe mostly and a signal that Google has not put safety measures in place - further evidence that all of us must remain vigilant in managing our own privacy settings.

Guarding privacy settings and installing online security measures like secured wireless networks will be more the norm inside households now, but how it affects market researchers online will be still something to watch. Proactive researchers should make their online tools more personal to get the best from their respondents and avoid being seen as the type of Big Brother-like entity many parents fear.

Need the reassurance

A school principal once told me that the toughest job she had was not working with the kids but "dealing with the parents." Parents need the reassurance that our research processes are safe and comfortable spaces in which their children can share opinions, be heard and not be exposed to anything unsafe.

In research done more than five years ago, I spoke to girls ages 10 to 17 about online predators. These innocent tweens and teenagers knew the word predator but didn't understand how it could apply online. This is a scary thought to most parents, who don't always know everything their child is doing online. Teaching kids about who is safe to talk to online and who is not has been the mission of many advocacy groups. In addition, moms and dads are carefully training their children to understand who they connect with online to ensure they stay safe. These parental fears are genuine and those of us who conduct online research projects must never forget that.

By taking some simple steps like a telephone call to your respondents and their parents or understanding how your child panelists are recruited and communicated to about your research, a market researcher establishes a safety zone that helps reassure nervous parents. The lines of communication with parents when doing an online project should not just be established at the recruiting level; they should also be part of the actual research.

Remember the dangers out there online; respect your child respondent and their parents. The result will most certainly be a more comfortable respondent and better insights with richer context for you and your client. | Q ethnographic research

A bit more personal

Qualitative techniques that go beyond the focus group room

By Tina Brogdon

Clients are increasingly utilizing qualitative market research methods that go beyond traditional focus groups to better understand what really drives and motivates their customers when making purchases and specifically when and why customers select one brand over another. The clients' end goals: to create a unique marketing campaign that differentiates their brands from the array of competitors within their category, to strengthen brand loyalty and to improve sales.

Many of the non-traditional qualitative techniques are a twist on standard focus groups or in-depth interviews, utilizing a setting other than a focus group facility. The benefit of these techniques for clients is they can offer a more personal experience, including face-to-face time with their customers instead of watching from behind a two-way mirror. This more intimate experience allows clients to see firsthand what their customers experience everyday and the challenges they face in life. The drawback is that these techniques limit the number of clients who can participate in the research. Additionally, they often require more time up front to plan the research and more time in the field to gather the insights.

Dine-arounds and on-site intercepts

In the restaurant industry, for example, dine-arounds and on-site intercepts have emerged as two ways to gain insight into the customer's experience within the client's own restaurant as well as the competitive set of restaurants consumers often select from. Dine-arounds often consist of no more than four to five respondents, the moderator and one to two clients. In contrast, intercepts are often one client, the moderator and the customers who are intercepted upon entering the restaurant.

By taking the customer to the restaurants or intercepting them at the restaurant, clients are able to watch the actual experiences unfold live versus listening to a replay of it during a focus group, which might or might not capture all the details accurately. This technique offers a real-time evaluation of the restaurant atmosphere, menu selection, food quality and presentation, staff service, restaurant cleanliness and a multitude of other elements that could easily be overlooked or not brought up during traditional groups.

When doing this type of work it is important to define the research objective to make sure you capture all elements in a noise-filled and active environment. In a study our firm conducted in 2009 the client was looking to: assess the over-

snapshot

The author explores how dine-arounds, shop-alongs and other on-site and ethnographic research approaches can give marketers valuable, up-close access to their customers.

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all presentation and taste appeal of new menu items; understand how and if the wait staff promoted these new entrees/appetizers; and gauge consumer reaction to the new food dishes once served and eaten.

The first part of the research implemented the dine-around methodology with consumers who frequented the restaurant in the past month. These patrons were pre-recruited and asked to meet the moderator for a dinner discussion at a set time. One lesson I learned during this project is that if you are going to the same restaurant multiple times it's helpful to be sure you are seated in different sections, in order to not make wait staff suspicious that you are "shopping their establishment," as this may interfere with their normal behavior with patrons. Another way to resolve this issue is to add another person to the interviewing team.

Friendship groups are a great way to learn about issues that many respondents are not comfortable expressing in a focus group setting. Friendship groups give clients insights into how friends and family members influence, interact with and support each other and the impact they have on actual purchases and services utilized. Friendship groups are often conducted at someone's home, at a coffeehouse or some other social gathering place and continue to gain in popularity as a way to connect with consumers in a more realistic environment. This qualitative methodology is ideal for discussing sensitive or personal topics that might otherwise be embarrassing to cover with a group of 10 strangers.

When conducting friendship groups at home it is important to consider scheduling interviews when interruption by other household members will be limited. If dealing with small children in the household, consider offering more incentive to have a baby-sitter watch the children as the groups are being conducted. Too many interruptions can jeopardize the connection, cohesiveness and desire to be open for all participating.

Increasingly popular

Ethnography and shop-alongs have become increasingly popular within the CPG and retail apparel industries. Observing someone in their own home, coupled with watching them shop at a retailer, is a good way to understand consumers' behavior. The actions and behaviors consumers exhibit during this type of research are often repetitive - not top-of-mind - or deemed unimportant by the respondents and are often not mentioned when sitting in focus groups. However, by combining observation and in-depth interviewing, clients can glean insights on packaging improvements, product placement on shelves or in departments, alternative product usage, point-of-purchase marketing, brand loyalty and a host of other topics. Combining these two techniques with a synthesis session at the end of the project allows clients to create new ideas that will enhance products currently on the market and/or to create new products that will enhance a consumer's life.

When considering ethnography here are a few things to keep in mind:

- First, does your team have experience with home visits? It is a good idea to get some training on what is appropriate etiquette while in a consumer's home and the roles and responsibilities of each person on the team during the interview.
- Limit the number of clients visiting a home to make it feel less intrusive to the consumer.
- When going out for a shop-along, check to see if the state you are going to do it in allows for hidden-camera video. If so, consider letting the participant go in alone and debriefing them on the experience afterwards. If not, keep the in-store team and materials taken into the store limited to avoid drawing the attention of store management.
- Lastly, don't pass up the opportunity to debrief after each interview. This is when the insights and discovery are the most memorable and should be captured.

Add richness

When conducting many of these non-traditional research techniques, you can add richness by giving homework to respondents prior to meeting with them or during the course of the research project. Diaries, photographic and usage journals, online blogs and collages are just a few ways to reach into the consumers' lives even deeper. These tools help fill in pieces of information, emotions and feelings that might not arise during your time with the respondents.

Open their doors

Smaller companies who market to niche consumers are often limited in resources to fund traditional focus group research. Because of these limitations, consumer panels, social media and research among organizational communities can be effective ways to understand the target customers' needs.

Often, organizations that support specific causes are willing to open their doors to allow for a variety of research to be conducted during their monthly or weekly meetings. During these sessions, product research, packaging, communications and other issues facing the company can be explored among target consumers.

When reaching niche consumers it is important to go beyond the typical recruitment methods. Likewise, reaching niche audiences often requires a more innovative approach. For example, San Diego-based Arico Natural Foods did this when it wanted to launch a "better-for-you" snack. It reached out to a group of university students and asked them to create a YouTube video showing how its products were used. This YouTube contest became the marketing vehicle to launching the new snack and it generated a following among young adults.

A helpful hint when working with organizations is to learn how often their constituents meet. Is it monthly, weekly or some other interval? Plan research far enough in advance so the organization can allot you the amount of time needed to complete your research and not make it a sideline activity. Find the group leader and work through them to organize the research project.

If you are doing taste-tests with the group, bring all the supplies required with you. I have too often been told upon setting up these meetings that they will have napkins, plates, etc., available for my meeting only to find when I arrive at the meeting place that these items are locked up and the person holding the keys isn't around.

Another thing to keep in mind when tapping into specialty groups is they often score products more favorably because they are excited a company is listening to their special needs. Just because you get a 93 percent overall appeal score doesn't always translate into acceptance in the broader market. Make sure you benchmark prototype test scores against a successful in-market product.

Getting personal

Although many of these techniques have been available to clients before, they are now being utilized with greater frequency to better understand how consumers relate to products and who or what influences the consumer's decision to purchase a brand. As their marketplaces grow increasingly competitive, companies are realizing that getting the rich insights they need often requires coming out from behind the mirror and getting personal with their customers. | Q ethnographic research

Coherence for adherence

How to obtain a 360-degree view of pharmaceutical usage

By Laura Winn Johnson

In today's volatile and competitive marketplace, issues of compliance and adherence have never been more critical for pharmaceutical brands. To succeed, it's essential for those in pharmaceutical brand leadership to go beyond the drug and its delivery system toward an understanding of the larger context of therapeutic category and the roles that brand and medication play in impacting and improving people's lives.

In other words, how does the brand fit into the 360-degree context of the patient's life? This lens-on-life perspective is most effectively and efficiently achieved through combined ethnographic methodologies that yield a deeper, more contextual knowledge of customers. Through combined methodologies, one can create an authentic observational framework that addresses issues directly linked to key strategic decision-making, such as:

- Are your customers following their doctors' orders about frequency, dosage or directions?
- Are your customers refilling their prescriptions? How easy is it to get a refill? Will they refill with your brand or a generic?
- Are your customers aware of how your product is helping them?
- Are your resources dedicated to the right strategies and tactics?
- Are you missing an opportunity to launch a behavioral modification program in conjunction with your drug?

Presents challenges

In the traditional academic sense, ethnography is defined as the physical observation of others in the context in which a particular action or behavior occurs. Ethnographic marketing research, while valid for many categories - laundry detergent, for example - presents challenges in more complex categories like financial services and pharmaceuticals where "invisible," highly personal and nearly subconscious thoughts rule the decision-making process.

Ethnography is flexible, thereby allowing creativity and technology to immerse the observer in the environment, without living with the observed individuals for months on end or influencing them. In order to achieve this flexibility, though, one must go beyond traditional research approaches - even most traditional

snapshot

By combining ethnographic and other research methods, pharmaceutical firms can get a fuller picture of how patients use - or don't use - the medications prescribed to them.

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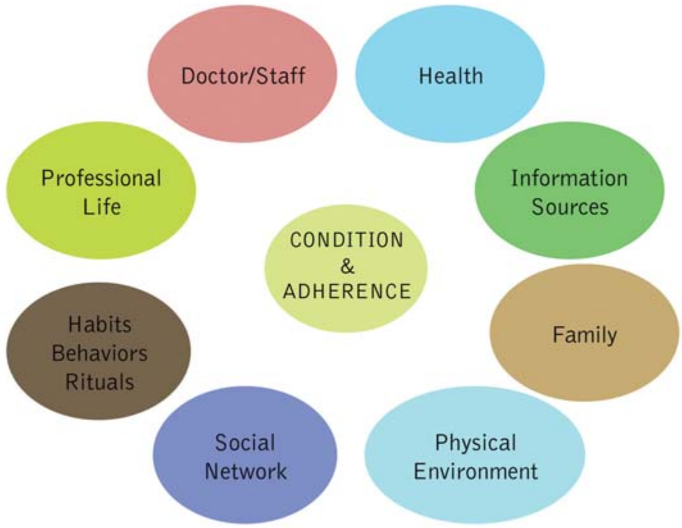
Figure 1: A 360-degree View of Adherence



ethnographic research.

The overarching principles of cultural anthropology enable a more comprehensive ethnographic design that allows the researcher to "see the unseeable" - that is, things that are not physically observable, such as an attitude, decision process, perception and driving motivation. All of these things are critical to understanding issues like compliance and adherence.

More comprehensive understanding

The path to greater brand resonance requires marketers to develop a more comprehensive understanding of consumers. To that end, utilizing a lens-on-life approach is needed: How are they living with a condition or disease state, whether or not they're already using your brand? To develop innovative solutions to the critical issues of compliance and adherence, a clear connection must be made between the product and ALL of the ways in which a particular condition or disease state affects the way users think about themselves and their experiences in life - hence the 360-degree reference (Figure 1). Understanding all of the ways in which the disease state touches a patient's life enables a brand to employ more innovative solutions.

The principles of a 360-degree lens-on-life approach permeate every aspect of the ethnographic study, all the way down to the specifics of organically-developed assignments.

The observational framework holds closely to the rigors of classical ethnography - being both clear about what is to be observed while remaining open to what one will find. In this careful balance lies the precious, unexpected insight so coveted by the pharmaceutical brand manager.

The design of an ethnographic study typically involves aspects of in-person observation as well as situations in which patients will observe themselves, with an ethnographer's training and guidance. Self-observation assignments are customized for the therapeutic category and generally involve a scope that incorporates key aspects of the consumer's life experience, including the ways in which a condition impacts their life.

Four research approaches

Four research approaches compose a 360-degree lens-on-life study. Together they bring researchers closer to seeing the "unseeable" aspects of adherence and compliance: self-observation, longitudinal observation, multimethod research and technology.

Approach 1: Self-observation

Self-observation (consumers observing themselves) is a valuable technique, especially when combined with a longitudinal approach. Both aspects (the seeable and the unseeable) can be examined with this technique. As such, it can be extremely cost-effective and often more representative of real life when compared to in-person observation alone. The most distinct benefit of self-observation is in shedding light on the deeply personal and unseeable aspects such as perceptions, beliefs and decision processes. With the ethnographer's guidance, consumers explore and observe their own behaviors, attitudes and perceptions.

Within the construct of self-observation, one successful approach is the use of organically-developed themes or assignments within a longitudinal study. These assignments, when designed by an experienced ethnographer, enable the consumer to take a cathartic and revealing journey of self-discovery related to their lives and their condition - with the brand's marketing team along for the ride. Participants may explore and become aware of deeply personal self-perceptions, attitudes, habits, etc., that they have developed over time and about which they were previously unaware.

Example: Efficacy of prescription nasal sprays

If patients do not quickly feel relief, they may start taking medicine as directed but fail to maintain the regimen.

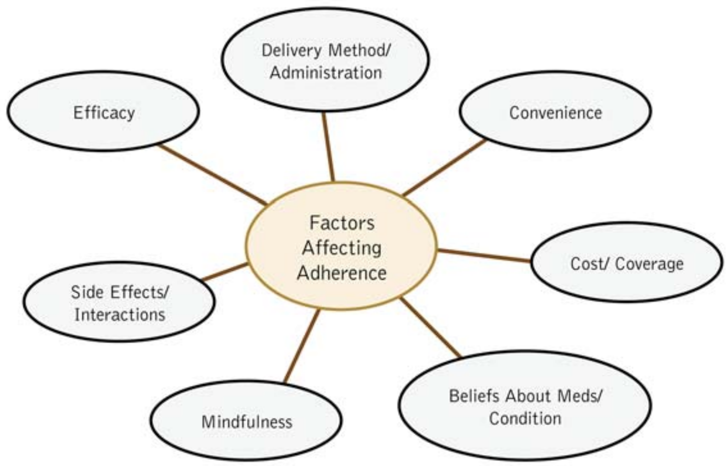
Why self-observation works in this case:

- Patients can report their actual adherence and reasons for not following the regimen.
- Through the training of an experienced ethnographer, respondents' self-observation enables researchers to see things that would be nearly impossible to see in person.
- The researcher benefits from a deeper, more introspective view (themes and learnings over time) via a longitudinal approach.

Approach 2: Longitudinal observation

Pharmaceutical and health-related decisions involve complex, deeply personal decisions or occurrences that develop over long periods of time (Figure 2). While traditional research approaches such as in-depth interviews or focus groups can elicit wonderfully rich information for many types of research objectives, they frequently fall short when a

Figure 2: A Number of Factors Can Affect Adherence



larger, more authentic understanding of someone's entire experience with a condition is essential. For most therapeutic conditions, time spent with consumers in their homes can give marketers a more up-close and personal understanding of their customers' daily lives or routines. But there is so much more to the overall puzzle than what can be seen in one day.

In contrast, the recommended longitudinal approach focuses on creating a process of self-discovery that goes well beyond what any ethnographer - or the consumers themselves - could know or relate in any one sitting. Because of the level of self-revelation required to "crack the code" of compliance, more time is required. This approach provides the consumer with a process and a stimulus to recognize - and then observe - the behaviors and attitudes that are most critical to the pharmaceutical brand and therapeutic category. Even more important, a longitudinal approach that leverages technology provides a way to observe these nuances with the least amount of influence on the behavior itself and in a more cost-effective manner.

Example: Delivery of human growth hormone

Based on how complicated it is to administer the medicine, people may not always administer it correctly.

Why a longitudinal method works in this case:

- Patients can report feelings and adherence through the experience of injecting (or eventually discontinuing) medication.
- In-person observation is helpful, but to reveal a wider array of emotional associations, a longer-term view is required.

Over time one can view the overlap between considerations and how they act together to impact compliance and adherence. A 360-degree lens-on-life also reveals the impact of other family members, the emotions involved in administering a treatment to one's self or others and the emotions associated with the method of delivery. Over time, one begins to understand the interplay of emotions at work every time a treatment is administered by witnessing the patients' routine, facial expressions, impact on daily life, etc.

Approach 3: Multimethod research

Blending traditional and less traditional methods brings researchers closer to covering all the bases (Figure 3). The mix can be complementary, leveraging tactical strengths and finding multiple ways to gather insights, or it can meld the best parts of each method into one hybrid approach.

With many categories, people can say that they do one thing but actually do another - sometimes without even realizing it. Take the example of healthy eating choices. In one research instance, a patient described how she had started eating healthier - while eating a hamburger and a plate of french fries. This humorous example underscores the need for a more comprehensive ethnographic approach, one that combines in-person observation with more longitudinal aspects so that patients can really see their own patterns. From a research perspective, it's not as easy as just listening to what someone says they do or will do.

Example: Diabetes medications

Diabetes is an especially interesting therapeutic category because those with the condition often have to manage their behaviors and medications according to a detailed regimen - often a series of monitoring, shots and pills. It requires changing one's routine and can have a significant impact on daily life. The easier the prescription is to fill and follow, the greater the likelihood of adherence.

In the case of diabetes, a one-day, in-person observation could lead to an incomplete picture of what happens on the days the diabetic patient isn't being observed. Thus, we see the importance of observing the behavior in a variety of ways in order to see the full picture and reduce the influence of the observation itself.

To really understand the many complicated impacts on adherence and compliance, a combination of ethnographic methods usually leads to the most robust results. This is particularly true of longitudinal observations in categories where patients may be reluctant or sensitive to admit - even to their own doctor - how well they follow the doctor's instructions for taking a medication.

Why a mixed-method works in this case:

- Just watching someone in-person can impact how they behave. If a patient knows someone is observing them for a day, they will likely adhere to every element of every prescription for that one day.
- Just asking someone depends on how well they know their own experience and beliefs. Individuals may not be able to articulate all of their influencers, especially without time to fully consider it over the course of a few days.
- Just communicating online doesn't always bring out the entire picture. Anonymity can be great, but

Figure 3: Examples of Methods That Can Be Combined in a Longitudinal Study to Obtain a Fuller Picture

people may still over- or understate what they do and how often. In-person observation is often tremendously important to get the whole truth, especially in certain therapeutic categories.

Approach 4: Technology

Technology helps close the gap and facilitates a more robust 360-degree view, but it's not a magic bullet. Technology expands the researcher's ability to "walk in the customers' shoes," moving beyond in-person observation. And technology can enable longitudinal views, more immediate reactions, and more authentic insights.

Why technology works to facilitate these objectives:

- Greater flexibility and convenience for participants to provide input leads to higher participation rates and often generates more thoughtful responses.
- Ongoing access to and interaction with respondents - versus a single discussion - creates relationships with participants that often yield greater insight into nuanced behavior and attitudes.
- It enables longitudinal data or the ability gather information over long periods of time. In other words, you're not seeing if someone adheres to the regimen that day, but every day and over time, as well as how it changes over time and in reaction to various symptoms.
- The relative anonymity makes participants more comfortable and willing to share more personal and truthful information, particularly in health categories that may be very personal or potentially embarrassing.
- Digital data collection allows for the generation of "instant transcripts" and for the immediate capture of real-time thought and action rather than relying on participants' recollections. People may "remember" greater adherence with a medical regimen than they actually followed.
- Online data collection is typically more time- and cost-efficient than in-person or phone and allows for greater geographic diversity, larger samples and shorter periods of fieldwork.
- Online platforms with multimedia capabilities can allow for richer stimulus in participant responses and more engaging presentations.

Example: Black-box label warnings and the impact on adherence

Black-box warning labels are the most extreme example of the potential impact of side effect and interactions. Patients and doctors must weigh the benefits of taking a medicine with side effects versus not taking the medicine and coping with the symptoms of the actual condition.

Black-box warnings on drugs to prevent heart attacks, treat diabetes, arthritis and eczema have led to a range of new considerations for doctors and patients. However, understanding how people cope with side effects and drug interactions isn't a very good question for a focus group. Technology enables a feeling of anonymity when talking about sensitive medication concerns and side effects.

Weight-loss case study

To see how this approach might work, let's look at a hypothetical weight-loss case study. A pharmaceutical brand wanted to develop a new, more useful segmentation based on a greater understanding of customers. The results would be used to better position the company's specific brand and encourage trial and adherence.

Business objectives:

- Identify and gain a deeper understanding of the primary target audiences to increase marketing efficiency and effectiveness for a weight-loss medication.
- Determine segments that are really committed to losing weight but know that it would be hard to achieve through willpower and diet alone.

Research objectives:

- Identify potential drivers of differentiation between consumer segments based on psychographic, attitudinal and behavioral elements.
- Understand the pathways consumers take to try to lose weight.
- Determine if there are consumer segments more likely to consider taking a medication to support weight loss and continue taking it as prescribed.
- Identify tipping points that motivate people to advance to the next stage of change and take action to lose weight in the near term.
- Compile information to create meaningful and detailed profiles of consumer segments following a quantitative segmentation.

Methodologies included a series of qualitative phases, including: workbooks and mini-groups among consumers in various stages of behavior change to lose weight; self-observation and journaling for a six-week period among consumers who plan to start a weight loss program within 30 days.

Phase one included an in-person briefing based on their stage of commitment to losing weight. This stage "primed the pump" for the critical observation work that took place in phase two. Initial discussions sensitized participants to the aspects of their experiences about which the brand was most interested. And the first phase provided the initial snapshot of participants' relationship with their weight (self-perceptions, habits, etc.).

Phase two included a series of assignments for self-discovery over several weeks, including: a timeline of relationship with food; an experience map to plot successes and challenges, key triggers and various therapeutic efforts; reporting of self-perceptions and perceptions of weight and health and; a weight-loss journal.

Respondents' reactions to this research process – the assignments themselves and the process of completing them – revealed a great deal about the emotions, barriers and opportunities involved in weight loss.

Phase three was about bringing it all together. By phase three, the better-trained participants were able to observe their own experiences. And they did so longitudinally, which told the whole story. At this point, they poured out a new level of insight about themselves and their journey. Participants tapped into the deeper, more "invisible" aspects of their journey that frequently hinder lifestyle and medical choices.

The result of this 360-degree approach was a vibrant segmentation that guided a subsequent quantitative study, new target-marketing and positioning and improved messaging and media strategy. Brand marketers were armed with learnings to differentiate their brand among the highest-priority segments through a greater understanding of:

- authentic, textured and comprehensive snapshots of each segment that helped brand teams really get to know them – including characteristics such as demographics, attitudes and behaviors;
- deeply-held weight-loss fears that informed innovative brand strategies and marketing;
- underlying motivations people have to lose weight and the enormous impact they have on real dedication to the task;
- messaging to target the real reasons people commit to losing weight, not the reasons they might claim (like health).

Worth far more

Combined research methodologies, when utilized appropriately, can be worth far more than the sum of their parts. Even in the most complex and emotionally-loaded situations, experienced ethnographers can help participants achieve a level of self-discovery and awareness that would never be possible through any single, stand-alone approach. This ability to observe participants as they explore deeply personal self-perceptions, attitudes and habits can provide the researcher – and thus the brand marketer – with the necessary foundation for understanding challenging issues like adherence and compliance. | Q

continued from p. 8

nine percent of those living in households earning $75,000+ own desktop computers, compared with 55 percent of those living in less well-off homes; 79 percent own laptops, compared with 47 percent; 70 percent own iPods or other MP3 players, compared with 42 percent; 54 percent own gaming consoles, compared with 41 percent; 12 percent own e-book readers, compared with 3 percent; and 9 percent own tablet computers such as iPads, compared with 3 percent. For more information visit www.pewinternet.org.

Lay-low leisure time - Hispanics hunker down at home to have fun and save money

The effects of the Great Recession are still rippling through the global economy, and in 2010 the leisure preferences of young Hispanic adults changed from activities that cost money to lower-cost alternatives to save cash, including choosing to spend more time at home, be it cooking, surfing the Net or hosting friends, according to a study from Chicago research company Mintel.

One free or low-cost leisure activity enjoyed by young Hispanic adults is spending time at home. Sixty-seven percent of respondents say they like spending most of their free time at home with members of their family. Meanwhile, 60 percent take pleasure in entertaining people at home and 33 percent enjoy cooking dinner at home with friends.

"Among Hispanic respondents under 35, the largest net increases in participation in the past year are seen in surfing the Internet, watching movies at home, spending time with family and listening to music. Increases are also seen in cooking for fun and exercising. Each of these activities might be considered a lower-cost alternative to other leisure options," says Leylha Ahuile, senior multicultural analyst, Mintel.

Many young Hispanic adults have turned to the Internet for entertainment. Twenty-eight percent of those surveyed say the Internet is a way to socialize and meet others, while 34 percent say that the Internet is their prime source of entertainment.

"More expensive options, like going to the movie theater and attending live concerts, have seen net decreases in participation. In fact, nearly all activities that require admission fees or other discretionary spending, such as traveling, leisure shopping, cultural events and museums, have seen lower levels of participation this year compared to last," says Ahuile. For more information visit www.mintel.com.

Conflicting messages confuse youth self-image

For all the talk about the obesity epidemic that's afflicting young Americans, a slim majority of youth (51 percent) is still "happy with the way [they] look," according to a survey conducted by the YouthBeat division of C&R Research, Chicago. That sentiment, however, shifts substantially among age groups.

While 30 percent of tweens (grades five through eight) are happy with their appearance, only 18 percent of teens (grades nine through 12) feel the same way. And while self-image is typically believed to be a larger concern among girls, boys are not immune to this issue. Only 35 percent of the boys in the survey group strongly agree that "I feel happy with the way I look."

"Young people are faced with conflicting messages. On one hand, they're being asked to be vigilant about their weight. On the other, they're being told that they should accept themselves and their appearance," says Amy Henry, vice president, Youth Insights.

When it comes to body image, cultural differences factor in. YouthBeat's data showed that African-American youth, for example, have a far more positive body image than their Hispanic or Caucasian peers. Nearly half (48 percent) of those in the survey group strongly agree with the statement that they are happy with the way they look, compared to 33 percent of Hispanic youth and 30 percent of Caucasian youth. For more information visit www.youthbeat.com.

Americans part with the little luxuries to save money

There are always small ways to save a little bit of money. Bringing lunch to work or skipping the morning latté may not feel significant, but consumers have been told - and told again - that these cost savings add up over time. Many Americans have done or considered doing these things and have cut back in other small ways to save money. In the six months leading up to October 2010, three in five U.S. adults reported having purchased more generic brands and 45 percent had brown-bagged lunch instead of purchasing it, according to a survey conducted by Rochester, N.Y., research company Harris Interactive.

Just over one-third of Americans are going to the hairstylist or barber less often and have switched to refillable water bottles instead of purchasing bottled water. Approximately 20 percent of Americans have stopped purchasing coffee in the morning and cut down on dry cleaning, and 14 percent have begun carpooling or using mass transit. Media, entertainment and communication may also have taken a hit in these economic times. One in five U.S. adults have cancelled or cut back on cable television service (22 percent) and 17 percent have changed or cancelled cell phone service or cancelled landline service and are only using a cell phone. In not-so-good news for the print industry, over one-quarter of adults have cancelled one or more magazine subscriptions while 17 percent have cancelled a newspaper subscription. In addition, Americans have considered cancelling a newspaper subscription (11 percent) or a magazine subscription (8 percent).

Breaking the results down by generation, Gen Xers (those ages 34-45) are most likely to purchase generic brands (70 percent); brown-bag lunches (62 percent); go to the hairdresser less often (45 percent); and to have stopped purchasing coffee in the morning (35 percent). Echo Boomers (those ages 18-33) are less likely to have cancelled a magazine subscription (18 percent), compared to at least 30 percent of all the other generations. However, Echo Boomers are more likely to have cancelled their landline phone service (22 percent). For more information visit www.harrisinteractive.com.

U.S. adults understand healthy eating but fail to execute

U.S. adults across all generations understand the principles of healthy eating. While the majority of adults recognize the need to eat healthy, their translation into healthy eating behavior varies by generation. Older generations eat more healthfully than the younger generations, but still four out of five adults (nearly 170 million people) have a diet whose quality needs improvement, according to data from Port Washington, N.Y., research company The NPD Group's Healthy Eating Strategies by Generation report, which identifies the gaps between actual consumption behaviors and intentions.

Younger generations - Generation X, Y and younger Boomers (ages 21-54) - have the least-healthful diets. Older consumers (ages 54+) often have the greatest need to eat healthy due to underlying medical conditions and are driven to do so. What the generations appear to have in common is a shared understanding of what constitutes healthy eating. Adult consumers across all generations define healthy eating consistently and are aware of the top characteristics of healthy eating and of a healthy lifestyle: exercise regularly; eat well-balanced meals; eat all things in moderation; limit/avoid foods with saturated fat or cholesterol or trans fats; and drink at least eight glasses of water per day.

"Educating consumers about proper health and nutrition need not be the primary goal for food manufacturers," says Dori Hickey, director, product development, The NPD Group. "Connecting the dots for consumers in terms of a product benefit to a fundamental characteristic of healthy eating is more the challenge."

The nutritional value of foods is also front-and-center with many adults. Almost 85 million adults ranked nutritional value/healthful as No. 1 or No. 2 in importance as a need-driver in deciding what to eat and drink. Taste and price/value are in the top three for the three younger generations. For older consumers, freshness replaces price/value in ranked importance.

While many aspects of their diets could use improvement, the overall largest deficiencies in adults' diets are insufficient intake of fruits, vegetables and dairy products and overconsumption of total fats. Consumption of total fats is the most critical for those 54+. For more information visit www.npd.com.

Marketers put stock in branded content

Branded content initiatives are considered by marketers to be more effective than any other leading form of advertising and marketing, and believers are putting their money where their mouth is, according to research from the Custom Content Council, a New York custom publishing association, in partnership with ContentWise, a Phoenix branded content newsletter.

The No. 1 reason for using branded content is customer education and retention, and marketers see their investment fueling longer-term returns.

Content spending in 2010 was the second highest ever, at $1,366,605 per company. Print represented 43 percent of the total spending, while electronic and other accounted for 35 percent and 12 percent, respectively. The study concludes that the recession is easing, noting that 31 percent of those surveyed expect content spending to increase in 2011. Twenty-nine percent of the average overall marketing, advertising and communications budget funds were dedicated to branded content. This is the second greatest ever (first was 32 percent in 2009).

Among reasons for using branded content and its effectiveness, 66 percent of marketers think branded content is superior to direct mail and 63 percent think it is superior to public relations. The primary reason to deploy branded content initiatives is to educate customers, according to 54 percent of the companies surveyed, followed by customer retention (23 percent). The leading secondary reasons were customer retention (35 percent) and educating customers (27 percent), though brand loyalty factored in at 26 percent.

The use of external agencies (such as custom publishers, public relations/marketing firms, design firms, video production companies or interactive agencies) to handle some aspect of branded content initiatives remains consistent with previous years at around 50 percent. Outsourcing was more prevalent among print forms (45 percent) of branded content than it was among electronic (19 percent) or other (23 percent) forms. Of all the branded content initiatives, some portion of these initiatives was outsourced 31 percent of the time.

For the first time in 2010, respondents reported to what degree their organization is shifting from traditional forms of advertising and marketing to new forms (i.e., branded content, content marketing, custom publishing or custom media). A total of 68 percent of companies indicated that they were shifting to branded content and the majority of companies (61 percent) have experienced a moderate shift in their spending while 7 percent reported an aggressive shift. For more information visit www.custompublishingcouncil.com.

Product and Service Update
continued from p. 12

5x Technology integrates CRM solution with cloud computing platform

5x Technology, a San Diego IT company, has integrated its IntelligentInformation solution with the cloud computing platform from NetSuite, a San Diego business software firm. IntelligentInformation is designed to perform standardization, cleansing, merging and enhancement of customer data. Built using NetSuite's SuiteCloud development platform, the integrated solution is intended to extract customer data out of a NetSuite customer's system; tag records that have redundant and incorrect information based on a client's specifications; cleanse and merge duplicates; and then upload the data back into the NetSuite system.

The IntelligentInformation solution includes a software tool and service that cleanses and verifies contact information and can handle standard and unique database fields, including job title, industry, revenue size, Web site, SIC codes, NAICS codes and can verify e-mail addresses and direct phone numbers, as well as profiles for social network sites such as LinkedIn and Twitter. For more information visit www.5xtechnology.com/index.html.

Research company debuts dashboard for streamlined business results

London research company eDigitalResearch has developed eDigitalDashboard, an interactive, personalized and condensed summary report of key performance indicators and topline statistics to provide a visual snapshot of real-time business results. The eDigitalDashboard system aims to allow users to drill down into research results to identify trends and issues across multiple sources, facilitating targeted decision-making. Available on HUB, the dashboard uses Web technology and a graphic design interface to give professionals complete and bespoke design control, while the online access automatically generates fresh statistics, allowing for immediate analysis of results. For more information visit www.edigitalresearch.com.

Briefly

Portland, Ore., research company Revelation Inc. has expanded its language capabilities to include Russian and Turkish, bringing the number of languages that Revelation supports to 16. For more information visit www.revelationglobal.com.

Vancouver, B.C., research company Techneos has released SODA (Survey On Demand Application) for iPhone and iPod Touch platforms, in addition to previous availability for Blackberry, Android, Windows Mobile and Nokia. For more information visit www.techneos.com.

Rochester, N.Y., research company Harris Interactive has launched Flash Poll in the U.K., France and Germany. The Flash Poll service is designed to provide representative research data of up to 1,000 respondents in 36 hours. The company also has additional countries scheduled for Flash Poll coverage in the first quarter of 2011. For more information visit www.harrisinteractive.com.

Compete, a Boston research company, has rolled out its All-Access API platform for delivering digital metrics on the Web. The platform is intended to provide users with unlimited access to detailed traffic, audience and engagement metrics covering the top one million Web sites. For more information visit www.compete.com.

The Brandon Agency, a Myrtle Beach, S.C., marketing company, has launched the Why We Buy consumer research panel, comprised of 4,300+ consumer participants ranging in age, education, income and family status. For more information visit www.thebrandonagency.com.

Port Washington, N.Y., research company The NPD Group has launched an Advanced Analytics suite of products using NPD's item-level tracking information to address issues in multiple industries. The expanded NPD Advanced Analytics suite will include six solution sets based on NPD's consumer and retail databases combined with specialized statistical and modeling techniques applied by NPD's research team. For more information visit www.npd.com/advanced_analytics.

Fresno, Calif., research company Decipher Inc. has changed its branding for its online presence, select print/downloadable marketing materials, trade advertising and direct mail campaigns. The company has also relaunched its Web site www.decipherinc.com.

continued from p. 14

OpenAmplify have partnered to use semantic technology to bring a human level of understanding to verbatim consumer response analysis.

Awards/rankings

The Qualitative Research Consultants Association (QRCA), St. Paul, Minn., has introduced the Qually Award - the QRCA Award for Excellence in Qualitative Research. Entries will be judged on creativity and innovation in the project's design, scope and execution, along with its impact on the client's business objectives. The winner will be announced at QRCA's Symposium on Excellence in Qualitative Research on May 12 in Chicago.

Vancouver, B.C., research company **Vision Critical** has awarded **Massachusetts Mutual Life Insurance Company**, Springfield, Mass., the 2010 Panel of the Year Award for excelling in engaging customers and generating business results.

New accounts/projects

Portland, Ore., research company **Rentrak Corporation** has signed a multi-year contract to provide its OnDemand Essentials TV ratings service to New York content distributor **Asian Media Rights**' video-on-demand offering.

Separately, **Free Speech TV**, Denver, has selected Rentrak's TV Essentials ratings service.

Finally, Rentrak has expanded its contract with **The Inspiration Networks** to provide its TV Essentials service for The Inspiration Networks' domestic networks, including INSP and Halogen TV.

Australian firms **Sweeney Research**, **The Social Research Centre** and **The Institute for Social Science Research at The University of Queensland** have signed agreements to adopt Montreal research company Voxco's multichannel data collection platform.

London research company **Verve** has been selected to conduct the annual online **Which?** Car Survey, a car reliability and satisfaction poll that surveys 60,000+ Which? U.K. consumer association members.

London research company **Kantar Media** has signed a five-year contract with **Emirates Media Measurement Company** to provide the first PeopleMeter audience measurement service to the United Arab Emirates media industry.

Columbia, Md., research company **Arbitron Inc.** has signed a multi-year contract with Spanish-language radio group **Univision Radio**, Dallas, to provide its Portable People Meter radio ratings services in 12 markets. Financial details of the agreement were not disclosed.

U.K. research company **SPA Future Thinking** has adopted Cologne, Germany, research company **Globalpark**'s feedback management platform for custom international media and youth research.

New companies/new divisions/relocations/expansions

Stockholm, Sweden, research company **Cint** has relocated its Berlin team to new offices in the city and has also opened a twin German office in Augsburg. Berlin will remain the headquarters for Central Europe.

Paris research company **Ipsos** has expanded its English-speaking global call center operation in Randburg, South Africa.

Pike Research, Boulder, Colo., has opened an office in Washington, D.C., at 1211 Connecticut Avenue NW. The company has also opened its European regional headquarters in London at 180-186 King's Cross Road.

The Interactive Advertising Bureau (IAB), New York, has launched the Mobile Marketing Center of Excellence, an independently-funded and -staffed unit inside the IAB, charged with driving the growth of the mobile marketing, advertising and media marketplace. Anna Bager has been named vice president and general manager of the unit.

ForeSee Results, an Ann Arbor, Mich., research company, has opened a London office and appointed Mansoor Malik as managing director for the operation.

Synovate in South Africa, a Bryanston research company, has launched a dedicated mystery shopping business unit.

STW Group, a New South Wales, Australia, marketing communications company, has launched **Touchpoint Research Australia**, a separate data collection agency previously part of Australian research consultancy AMR Interactive.

Radius Global Market Research, New York, has opened **Radius EMEA**, a London office dedicated to serving clients in Europe, the Middle East and Africa. Michael Fodor has been named managing director.

Insight Research Group, London, has relocated its North American operation Insight Health US from Rahway, N.J., to New York.

Research company earnings/financial news

Communispace, a Watertown, Mass., research company is reportedly looking for a buyer, according to a December 14 article in *Ad Age*. Venture-capital firms, technology companies and holding companies are among those to have shown interest.

Names of Note

continued from p. 10

Sal Brucculeri has been promoted to sales specialist, 3Q research solutions, at *Quick Test/Heakin*, a Jupiter, Fla., research company.

Stamford, Conn., research company *InsightExpress* has appointed **Matt Butner** as vice president, director, media and brand research.

Daniel Tottle has been named marketing coordinator for *Cint EU*, a division of Stockholm, Sweden, research company Cint.

Corvallis, Ore., research company *InsightsNow* has hired **Kimberley A. Greenwood**, **Lauren Landesman Wagner** and **Marianne Swaney-Stueve** as principal consultant, consumer marketing sciences division.

Carolyn Carrara has been hired as a sales associate for *dtw Marketing Research Group Inc.*, Flanders, N.J.

Yorba Linda, Calif., research company *Productive Access Inc.* has hired **Daren Jackson** and **Tony Moses** as research associate.

Rob Mooth has been promoted to lead Norwalk, Conn., research company *Ipsos ASI*'s relationship with Procter and Gamble in Cincinnati.

New York research company *Universal Survey* has appointed **Greg Kotovos** as chief sales and marketing officer.

Australian television ratings provider *OzTAM* has named **Doug Peiffer** CEO.

London research company *Double Helix* has hired four executives to its U.S. team in Fort Washington, Pa.: **Karin Galloway**, director, strategic market research; **Nicole Alunni**, senior project manager; **Kristi Strembicki**, senior field manager; and **Gabriella Palumbo**, project manager.

Ann Arbor, Mich., research company *ForeSee Results* has appointed **Mansoor Malik** as managing director for the U.K.

Infonetics Research, Campbell, Calif., has hired **Teresa Mastrangelo** as a video analyst.

Rochester, N.Y., research company *Harris Interactive* has appointed **Marty Beard** to its board of directors.

London research company *Opinion Leader* has hired **Lynne Tinsley** as senior research executive.

Westport, Conn., research company *Firefly Millward Brown* has appointed **Jelena Tierney** as senior account manager in Sydney, Australia.

Dushy De Silva has been named regional manager, Asia-Pacific, of Montreal research company *Voxco*.

Louisville, Ky., digital agency *LeapFrog Interactive* has named **Scott Million** director, research and analytics.

Port Washington, N.Y., research company *The NPD Group* has named **John Deputato** senior vice president, Advanced Analytics.

calendar of events

Featured Events

Globalpark will hold a complimentary Webinar, themed "Create Value (and Brand Insights!) from Facebook Fans," on **February 24** at 2 p.m. EST**.** Jim Whaley, vice president of Globalpark, will present. For more information or to register visit https://quirks.webex.com.

M/A/R/C Research will hold a Webinar, themed "Best Practices in Forecasting and Optimization," on **March 9** at 12 p.m. CST. Amy Barrentine, executive vice president and general manager of M/A/R/C, will present. For more information visit https://quirks.webex.com.

The Merlien Institute will hold a conference, themed "Qualitative Research in Web 2.0 Asia," on **February 22-23** at the STDM auditorium and Anthony SW Lau Exhibition Hall at the University of Macau in China. For more information visit www.merlien.org/upcoming-events/qrweba2011.html.

The Merlien Institute will hold a conference, themed "Computer-Aided Qualitiatve Research Asia," on **February 24-25** at the STDM auditorium and Anthony SW Lau Exhibition Hall at the University of Macau in China. For more information visit www.merlien.org/upcoming-events/caqra2011.html.

ESOMAR will hold its 2011 consumer insights conference, themed "A New World Order In Shopper Marketing," on **February 27-March 1** in Brussels, Belgium. For more information visit www.esomar.org.

IIR will hold a conference focused on innovation and collaboration on **March 2-4** at the Maritim proArte Hotel Berlin in Berlin, Germany. For more information visit www.iirusa.com/feieurope/home.xml.

The Council of American Survey Research Organizations will hold its annual online research conference on **March 3-4** at Mandalay Bay Hotel and Casino in Las Vegas. For more information visit www.casro.org.

ESOMAR will hold its annual Asia-Pacific conference, themed "Increasing Value Through Simplicity," on **March 20-22** in Melbourne, Australia. For more information visit www.esomar.org/apac.

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on **March 21-23** 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 22-23** at the Grange St. Paul's Hotel in London. For more information visit www.research-live.com/research2011.

The Pharmaceutical Marketing Research Group will hold its annual national conference on **March 27-29** at JW Desert Ridge in Phoenix. For more information visit www.pmrg.org.

SymphonyIRI will hold its annual summit on **March 28-30** at the Fontainebleau Miami Beach Resort and Spa in Miami. For more information visit http://cpgsummit.com.

The Merlien Institute will hold a conference, themed "Qualitative Consumer Research and Insights," on **April 6-8** at The Diplomat Hotel in Sliema, Malta. For more information visit www.merlien.org/upcoming-events/qcri2011.html.

IIR will hold a conference focused on design and culture and brand identity and packaging on **April 11-13** in Chicago. For more information visit www.iirusa.com/fuse.

Connecting Group will host a conference, themed "Market Research and Insights in Action," on **April 12-14** in New York. For more information visit http://connecting-group.com/web/eventoverview.aspx?identificador=16.

Globalpark will hold its annual mobile research conference on **April 18-19** at The May Fair Hotel in central London. For more information visit www.mobileresearchconference.com.

The Society of Competitive Intelligence Professionals (SCIP) and *Frost & Sullivan Institute* will host SCIP's annual international conference and exhibition on **May 9-13** at the Buena Vista Palace Hotel and Spa in Lake Buena Vista, Fla. For more information visit www.scip.org.

The American Association for Public Opinion Research will host its annual conference on **May 12-15** at the Arizona Grand Resort in Phoenix. For more information visit www.aapor.org.

The Pharmaceutical Business Intelligence and Research Group will hold its annual general meeting on **May 15-18** in San Antonio. For more information visit www.pbirg.com.

IIR will hold a conference focused on innovation and collaboration, themed "A New Front End: The Era of Collaboration," on **May 16-18** at the Seaport Boston Hotel and Adjacent World Trade Center in Boston. For more information visit www.iirusa.com/feiusa/fei-home.xml.

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.

2011

Marketing Research

Software Directory

The 2011 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 360 software titles. The software firms are arranged alphabetically. Along with the company's vital information, we've also included the title(s) of the software they sell.

To make finding software easier, we have added cross-reference tables grouping the various software packages by capability (tabulation, integrated interviewing, paper/scan, CAPI/CASI, CATI, Web interviewing, and miscellaneous software). The tables show a list of each product's features and capabilities, allowing you to compare and contrast several products at a glance. Once you locate a package that interests you, simply refer to the company's listing in the alphabetical section for more information.

The company alphabetic section begins on page 72.
The software cross-reference tables begin on page 84.

activeGROUP Ventures, Inc.
Norcross, GA
Ph. 770-449-5539 (Int'l) or 800-793-3126 (U.S.)
sales@activegroup.net
www.activegroup.net
Software:
activeGROUP ION Suite

Advanced Data Research, Inc.
Rochester Hills, MI
Ph. 248-299-5300 x210
soave@adrsoft.com
www.advancedboca.com
Software:
Abase

The Analytical Group, Inc.
Scottsdale, AZ
Ph. 480-483-2700
info@analyticalgroup.com
www.analyticalgroup.com
Jack Pollack, President
Software:
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QueryWeb
Sp-Link
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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 setup, 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. 73)

Anyware Mobile Solutions
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sales@goanyware.com
www.goanyware.com
Software:
ReForm XT

Apian Software
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(See advertisement on p. 47)

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Software:
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(See advertisement on p. 74)

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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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Doug Sellner
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Eform

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Software:
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Forecast Pro Unlimited
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Ph. 617-527-4700
info@caliper.com
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Software:
Maptitude
Maptitude for Redistricting
Maptitude for the Web
TransCAD

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A Division of Autonomy
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Ph. 866-LUV-CfMC or 866-588-2362
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Ph. 44-207-917-9505
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Checkbox Survey Solutions, Inc
Watertown, MA
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Software:
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Checkbox Survey

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Software:
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Cint is a leading global technology company, focused on providing innovative SaaS-based solutions for the market research industry. Cint's Panel Exchange (CPX) platform brings research buyers and panel owners together to form a unique, transparent online sample marketplace. Through Cint, marketing and research professionals have access to over 4.5 million consumers in 40+ countries, including emerging BRIC markets. Headquartered in Stockholm, Sweden, Cint has offices in major cities across Europe, North America and Asia. For more information visit cint.com.

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Software:
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Yaron Brenman
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Creative Research Systems
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Bill Eaton, Vice President
Software:
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Elisabeth Scherer, V.P. Marketing
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Sally Hooper, Owner
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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

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
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Ph. 800-923-5523
info@decipherinc.com
www.decipherinc.com
Kristin Luck
Software:
Beacon

A marketing research services provider, Decipher specializes in online survey programming, sampling, data collection and data reporting. Utilizing proprietary Web-based applications, Decipher integrates state-of-the-art technology with traditional research techniques. Decipher is all about uncovering opportunities in whatever territory we explore with our clients. As your partner, Decipher isn't interested in just data, but also about what that data represents for you. We focus on technology and research systems that bring data to life, and in doing so, we help you reveal how even seemingly small discoveries can yield meaningful insights.
(See advertisement on pp. 56-57)

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. 13)

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 or 201-400-8916
hlevenbach@delphus.com
www.delphus.com
H. Levenbach, President
Software:
PEER Forecaster
PEER Planner for Windows

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

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

Dooblo Ltd.
Kfar Sava, Israel
678-389-6691 US; 972-9-767-8998
info@dooblo.net
www.dooblo.net
Assaf Kezurer, VP Research and Development
Software:
SurveyToGo

SurveyToGo is a mobile data collection software that enables you to create, conduct and manage electronic mobile surveys, laptop field surveys and PDA surveys. Surveys are first designed then saved to the server and then synchronized to either PDAs or laptops for field data collection. SurveyToGo is provided as a hosted service. That means you don't need to install any server software, make any IT changes or invest in setup costs. Simply download the SurveyToGo designer and register your account and you are off! It's better, safer, and smarter than traditional software. No "computer guy" required, and no complex technology changes. Your data is secure with SurveyToGo.
(See advertisement on p. 75)

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Ph. 856-931-5780
webinfo@easidemographics.com
www.easidemographics.com
Software:
The Rite Site

Empathica Inc.
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www.empathica.com
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ESRI Business Analyst Desktop

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(See advertisement on p. 35)

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Karen Jeffrey, Ph.D., President
Software:
ForSurveys

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(See advertisement on p. 47)

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(See advertisement on p. 40)

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www.hexworx.com
Susan Hoddinott, Director
Software:
TestKit

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www.hostedware.com
Software:
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Hosted Test

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(See advertisement on p. 37)

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sales@allegiance.com
www.inquisite.com
Wynn Hartley, Marketing Director
Software:
Inquisite Survey

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www.insideheads.com
Jennifer Dale
Software:
My Virtual Focus Facility

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Jonathan Ephraim, Managing Director
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(See advertisement on p. 77)

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(See advertisement on p. 47)

MarketingStat
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Software:
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MarketSight LLC
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Larry Hills, Managing Director
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Software:
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Andras Huller
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Software:
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NCSS
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Jerry Hintze
Software:
NCSS

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ezequiell@nearpod.com
www.nearpod.com
Ezequiel Lukin, Director
Software:
Nearpod

Nebu
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Ph. 31-25-131-14-13
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Nebu is a leading vendor of panel management and data collection systems for market research. Dub Knowledge, our panel and sampling management tool, is the most advanced system of its type available today. Dub

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(See advertisement on p. 63)

Nebu USA
New York, NY
Ph. 917-628-2273
nebu@nebu.com
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Ian Roberts
Software:
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Dub Knowledge

Nebu is a leading vendor of panel management and data collection systems for market research. Dub Knowledge, our panel and sampling management tool, is the most advanced system of its type available today. Dub Knowledge can cope with panels of any size, independently tested up to 20 million. It includes all the facilities you need to run any form of panel. Dub InterViewer is a multimodal Web-based data collection tool for CATI, CAPI and CAWI. Dub InterViewer is a scalable, reliable data collection tool for use on your own system or via SaaS. No project is too complex for Dub InterViewer.
(See advertisement on p. 63)

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New York, NY
Ph. 212-695-1590
steve@crosstab.com
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Steve Molkenthin
Software:
EzTab

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Software:
Opinio

Opinionmeter International
San Leandro, CA
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Software:
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(See advertisement on p. 19)

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(See advertisement on p. 47)

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Q Professional
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www.quicktally.com
Alan Warshaw, President
Software:
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Software:
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Ruby DESKTOP
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Research Reporter
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Software:
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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
Address Coder ESRI, p.76																	Buy	$$$$
Analytics Module Toluna, p.82							1,000	1,000	●	●	●		●	●	●			
askiaanalyse ASKIA - Software for Surveys, p.72	●					GUI	Unltd	Unltd	●	●	●		●		●			
askiavista ASKIA - Software for Surveys, p.72						Both	Unltd	Unltd	●	●	●		●		●		Either	
Asteroid Roy Morgan International Ltd., p.80	●					Both	Unltd	Unltd	●	●		●	●		●	●		
Asteroid Search Roy Morgan International Ltd., p.80																		
Asteroid WebReporter Roy Morgan International Ltd., p.80																		
CART Salford Systems, p.80	●		●	●		Both	8,192		●	●	●						Buy	$$
Confirmit Confirmit, p.74	●				●	GUI			●	●	●	●	●		●		Lease	
CPM System Sawtooth Software, Inc., p.80						GUI			●	●	●			●				
Dub InterViewer Nebu, p.78	●			●	●	GUI	Unltd	Unltd	●	●	●	●	●				Lease	
Dub InterViewer Nebu USA, p.79	●					GUI	Unltd	Unltd	●	●	●	●	●				Lease	
East 4.0 Cytel Inc., p.75																	Buy	$$
Eform Beach Tech Corporation, p.72	●				●	Both	Unltd	Unltd	●	●	●	●		●	●	●	Either	
EQS Structural Equations Modeling Multivariate Software, Inc., p.78	●		●	●		GUI			●	●	●		●	●	●	●	Either	$$
E-Tabs Lite Reader E-Tabs, p.76	●					GUI												
E-Tabs Writer E-Tabs, p.76	●		●	●		GUI											Lease	$$$
EzTab New Age Media Systems, Inc., p.79					●	GUI	Unltd	Unltd	●	●	●	●					Lease	$$$$
FASTAB Ad Hoc Tabulation DATAN, Inc., p.75	●					GUI	32,000	Unltd	●	●	●						Lease	$
Forecast Pro Business Forecast Systems, p.72	●					GUI	10	1	●		●						Buy	$
Forecast Pro Unlimited Business Forecast Systems, p.72	●					Both	Unltd	Unltd	●	●	●		●		●		Buy	$$$$
Forecast Pro XE Business Forecast Systems, p.72	●					GUI	100	1	●	●	●		●		●		Buy	$$$
GeoSight Sammamish Data Systems, Inc., p.80	●					GUI	Unltd	Unltd	●	●	●						Buy	$
GOLDMineR® Statistical Innovations Inc., p.81	●					GUI				●	●		●	●		●	Buy	$$
Hosted Survey Hostedware, p.77					●	Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	

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Tabulation Software

Software Title Company/Listing page #	Operating System					Tabulation Features								Significance Tests				Purchasing	
	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
IdeaMap®.Net Moskowitz Jacobs Inc., p.78					●	GUI					●	●						
ImagEntry Viking Software Solutions, p.82	●		●	●		GUI	32,000	32,000									Buy	$$
Infotools ESPRI Infotools, p.77	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Buy	$$
Infotools HARMONI Infotools, p.77	●					GUI	Unltd	Unltd	●	●	●	●	●		●		Buy	$$$
Internet Survey Machine Marketing Masters, p.78	●	●	●	●	●	GUI	32,000	Unltd									Buy	$$$
Ioxphere Xorbix Technologies, Inc., p.82	●	●			●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$
KMRQuest KMR Group, p.78	●												●				Lease	
Latent GOLD® Statistical Innovations Inc., p.81	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Buy	$$
Latent GOLD® Choice Statistical Innovations Inc., p.81	●					GUI	Unltd	Unltd		●	●	●	●	●		●	Lease	$$$
LogXact Cytel Inc., p.75																	Buy	$
m/360 Modern Survey, p.78																		
MarketSight® MarketSight LLC, p.78	●				●	GUI	10,000	Unltd	●	●	●	●	●	●	●	●	Either	$$
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MARS Salford Systems, p.80	●		●	●			8,192		●	●	●						Buy	$$$$
Mentor CfMC Solutions for Research, p.74	●		●	●		Syntax	Unltd	Unltd	●	●	●	●	●		●	●	Lease	
Mentor CfMC-U.K., p.74	●		●	●		Syntax	1 million+	Unltd	●	●		●	●	●	●	●	Lease	
MERLIN Tabulation System DATAN, Inc., p.75	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$$
MERLINPlus (plus menus) DATAN, Inc., p.75	●		●	●		Syntax	32,000	100,000	●	●			●	●	●	●	Lease	$$
Microtab Version 7 - Prof w/ SPSS Module Microtab, Inc., p.78	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$$
Microtab Version 7 - Professional Edition Microtab, Inc., p.78	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$$
Microtab Version 7 - Standard Edition Microtab, Inc., p.78	●					GUI	Unltd	Unltd	●			●					Buy	$$
MM4XL 7.2 MarketingStat, p.78	●					GUI	200	Unltd	●	●	●	●	●	●	●	●	Buy	$$
MRDCL Marketing and Research Data Consultants, p.78	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$$$
mTAB Research Analysis System PAI-Productive Access, Inc., p.79	●				●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	
MyStat 12 for students Systat Software, p.81						GUI												

Tabulation Software	Operating System					Tabulation Features							Significance Tests				Purchasing	
Software Title Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
NCSS NCSS, p.78	●					GUI	1,000	Unltd	●		●		●	●	●	●	Buy	$
Nvision Script NIPO Software, p.79					●		Unltd	Unltd	●	●	●	●	●	●			Lease	
OnTraq Marketing and Research Data Consultants, p.78	●					Both	Unltd	Unltd	●	●			●	●	●	●	Lease	$$
Opinionmeter's Survey Manager Opinionmeter International, p.79	●					GUI			●	●	●	●					Either	$$
Panel Portal - Whole Solution Toluna, p.82					●	GUI	1,000	1,000	●	●	●		●		●	●		$$$$$
PEER Forecaster Delphus, Inc., p.76	●					GUI			●					●	●		Either	$
PEER Planner for Windows Delphus, Inc., p.76	●					GUI			●	●	●	●	●	●	●	●	Either	$$$$
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Q Reader Q Market Research Software, p.79	●					GUI	Unltd	Unltd	●	●	●		●	●	●	●	Lease	$
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QPSMR Insight QPSMR Ltd., p.79	●					Both	30,000	30,000	●	●		●	●	●	●	●	Lease	$$
QPSMR Reflect QPSMR Ltd., p.79	●					Both	30,000	30,000	●	●		●	●	●	●	●		
QPSMR Solo QPSMR Ltd., p.79	●					Both	30,000	30,000	●	●		●	●	●	●		Buy	$$
QTAB Jan Werner Data Processing, p.82	●			●		Syntax	Unltd	Unltd	●	●	●	●	●	●	●	●	Either	$$$
QuestionPro Survey Analytics, p.81					●	GUI	Unltd	Unltd	●			●	●		●		Either	$$
QWRITERII for Windows Your Perceptions, Inc., p.82	●					GUI	2,000	200			●						Lease	$
RandomForests Salford Systems, p.80	●		●			Both	8,192		●	●	●						Buy	
Raosoft EZReport Raosoft, Inc., p.80	●					Both	Unltd	Unltd	●	●	●		●	●	●	●	Buy	$
Raosoft SurveyWin Raosoft, Inc., p.80	●					GUI	Unltd	Unltd	●	●			●	●	●	●	Buy	$
Rosetta Studio Rosetta Studio International, p.80	●					GUI		Unltd			●						Either	$$$$
Ruby DESKTOP Red Centre Software Pty Ltd, p.80	●					Both	Unltd	Unltd	●	●	●	●	●		●	●	Lease	$$$
Sensus Web Sawtooth Technologies, Inc., p.80	●					Both	Unltd	Unltd	●			●					Buy	

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Tabulation Software

Software Title Company/Listing page #	Operating System: Win	Mac	Unix	Linux	Web	Tabulation Features: Graphic User Interface or Script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Significance Tests: Chi-Square	F-Test	T-Test	Z-Test	Purchasing: Buy or Lease	Price Range
SI-CHAID® Statistical Innovations Inc., p.81	●					GUI	Unltd	Unltd		●	●		●				Buy	$$
SmartForecasts® Smart Software, Inc., p.80	●					GUI	Unltd		●	●	●	●	●	●	●	●	Either	$$$$
Snap Professional Snap Surveys, Ltd., p.80	●					GUI	Unltd	Unltd	●	●	●	●	●		●	●	Buy	$$$
Snap Scanning Snap Surveys, Ltd., p.80	●					GUI	Unltd	Unltd	●	●		●	●		●	●	Buy	$$$$
Snap Webhost Snap Surveys, Ltd., p.80	●					GUI	Unltd	Unltd	●	●		●	●		●	●	Either	$$$$
STAT XP Web Voxco (Voxco Group), p.82					●	Both	10,000	Unltd	●	●	●	●	●		●	●	Buy	$$$$
Stata StataCorp LP, p.81	●	●	●	●		Both							●	●	●		Either	$$$
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Statgraphics Centurion XVI.I Multilingual StatPoint Technologies, Inc., p.81	●					GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$$
Statgraphics Centurion XVI.I Professional StatPoint Technologies, Inc., p.81	●					GUI	1,000	Unltd	●	●	●	●	●	●	●	●	Either	$$$
Statgraphics Online StatPoint Technologies, Inc., p.81					●	GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Lease	$
Statgraphics.Net StatPoint Technologies, Inc., p.81					●	Syntax	Unltd	Unltd	●	●	●	●	●	●	●	●	Lease	$$$$
STATISTICA StatSoft, Inc., p.81	●				●	Both			●	●	●		●	●	●	●	Buy	$$$$
StatPac Survey Software StatPac, Inc., p.81	●					Syntax	2,000	Unltd	●	●	●	●	●	●	●	●	Buy	$$
STATS™ 2.0 Decision Analyst, Inc., p.75	●					GUI				●			●		●	●		$
StatXact Cytel Inc., p.75																	Buy	$$
StatXact Procs for SAS Users Cytel Inc., p.75																	Buy	$$
StyleMap®.Net Moskowitz Jacobs Inc., p.78					●	GUI					●	●						
Survey Said Enterprise Edition Marketing Masters, p.78	●				●	GUI											Buy	
Survey Select Expert SurveyConnect, Inc., p.81	●					GUI	Unltd	Unltd			●	●					Buy	$$
SurveyPro Apian Software, p.72	●					GUI	3,000	3,000	●	●	●	●	●				Buy	$$$
Systat 12 Systat Software, p.81						GUI			●	●	●		●	●	●	●	Buy	$$
TabRight RDA Group, p.80	●								●	●	●				●		Buy	$$$
TestKit Hexworx Computer Services P/L, p.76	●		●	●	●	Both	Unltd	Unltd	●	●	●	●					Buy	$

Tabulation Software	Operating System					Tabulation Features								Significance Tests				Purchasing	
Software Title Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
The Survey Cybernetic Solutions The Survey Software, p.75	●					GUI	1,000	32,000	●	●	●		●	●	●	●	Buy	$
The Survey System CATI Creative Research Systems, p.74	●					GUI	Unltd	1,000	●	●		●	●		●			$$$
The Survey System PDA Creative Research Systems, p.74	●						Unltd	na									Buy	$
The Survey System Web Creative Research Systems, p.74	●					GUI	Unltd	Unltd	●	●		●	●	●	●	●		$$
The Survey System (Version 10.0) Creative Research Systems, p.74	●					GUI	Unltd	Unltd	●	●		●	●	●	●		Buy	$$
TPL Tables QQQ Software, Inc., p.79	●		●	●		Both	Unltd	Unltd	●	●		●	●	●	●	●	Buy	$$
TreeNet Salford Systems, p.80	●		●	●		Both	8,192		●	●	●						Buy	$$$$
UNCLE Professional The Uncle Group, Inc., p.82	●					Both	65,534	9,999	●	●	●		●		●		Buy	$$$$
UNCLE Reports The Uncle Group, Inc., p.82	●					GUI	9,999		●	●								$
UNCLE Standard The Uncle Group, Inc., p.82	●					Both	65,534	9,999	●	●	●		●		●		Buy	$$$$
U-Tab™ Weeks Computing Services, p.82	●					GUI	Unltd	Unltd	●	●	●	●	●	●	●		Buy	$
VDE Viking Software Solutions, p.82	●		●	●		GUI	32,000	32,000									Either	$$
VDE+Images Viking Software Solutions, p.82	●		●	●		GUI	32,000	32,000									Buy	$$
Voxco Insight Publisher (V.I.P.) Voxco (Voxco Group), p.82	●				●		Unltd	Unltd	●	●		●						
WinCATI Sawtooth Technologies, Inc., p.80	●					Both	Unltd	Unltd	●			●					Buy	
WinCATI Mixed Mode Sawtooth Technologies, Inc., p.80	●					Both	Unltd	Unltd	●			●					Buy	
WinCross The Analytical Group, Inc., p.72	●					Both	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$$
WinCross Executive The Analytical Group, Inc., p.72	●					GUI	Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$$
Zip + 2 Polygons Sammamish Data Systems, Inc., p.80	●						Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$
Zip + 4 Centroids Sammamish Data Systems, Inc., p.80	●						Unltd	Unltd	●	●	●						Buy	
Zip Code Polygons Sammamish Data Systems, Inc., p.80	●						Unltd	Unltd	●	●	●	●	●	●	●	●	Buy	$$

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

Integrated Interviewing Software	Operating System					Design Tool	Types of Data Collection								Features			Purchasing	
Software Title Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	CAPI	CASI	CATI	Web	E-mail	Paper	Scanning	Keypad Entry	Tabulation	Statistics	Visual Tools	Buy or Lease	Price Range
ACA System Sawtooth Software, Inc., p. 80	●				●	GUI	●	●	●	●	●			●	●	●	●		
ACBC System Sawtooth Software, Inc., p. 80					●	GUI	●	●	●	●	●	●		●	●	●	●		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 76	●	●	●	●	●	Both	●			●					●			Either	
Beacon Decipher, p. 75					●	Both	●	●	●	●	●				●	●	●	Lease	
Blaise Westat, p. 82	●					GUI	●	●	●	●								Buy	
CBC System Sawtooth Software, Inc., p. 80	●				●	GUI	●	●	●	●	●	●		●	●	●	●		
Checkbox Mobile Survey Checkbox Survey Solutions, Inc, p. 74	●					GUI				●				●					
Confirmit Confirmit, p. 74	●				●	GUI	●	●	●	●	●	●	●	●	●	●	●	Lease	
Custom Panel Building Itracks, p. 77					●	GUI			●	●				●	●	●	●		
CVA System Sawtooth Software, Inc., p. 80	●					GUI	●	●	●			●		●	●	●	●		
Dub InterViewer Nebu, p. 78	●			●	●	GUI	●	●	●	●					●	●		Lease	
Dub InterViewer Nebu USA, p. 79	●					GUI	●	●	●	●					●	●		Lease	
Eform Beach Tech Corporation, p. 72	●				●	Both			●	●	●		●	●	●	●	●	Either	
EFS Employee Globalpark Inc., p. 76					●	GUI	●		●			●						Lease	
EFS Leadership Globalpark Inc., p. 76					●	GUI	●			●		●						Lease	
EFS Panel Globalpark Inc., p. 76					●	Both				●		●	●		●	●		Lease	
EFS Survey Globalpark Inc., p. 76					●	GUI	●			●		●						Lease	
Entryware (PDA and Laptop Solution) Techneos Systems Inc., p. 81	●				●	Both	●	●										Lease	
FocusVision Video Streaming FocusVision Worldwide, p. 76										●									
Hosted Survey Hostedware, p. 77					●	Both	●			●	●	●		●	●	●	●	Either	
IBM SPSS Data Collection Interviewer IBM SPSS software, p. 77	●				●	Both	●	●	●	●	●	●	●	●					
IT CATI/CAPI/Web Interview Technology, p. 77	●				●	Both	●		●	●					●			Buy	$$$$
Itracks Online CATI Itracks, p. 77					●	Both			●	●				●	●	●	●		
Itracks Online Surveys Itracks, p. 77					●	Both				●				●	●	●	●		
MarketTools CustomerSat MarketTools, Inc., p. 78					●	GUI				●	●	●	●	●	●	●	●	Either	
MaxDiff/Web Sawtooth Software, Inc., p. 80	●				●	GUI	●	●	●	●	●	●							$$$
MM4XL 7.2 MarketingStat, p. 78	●					GUI									●	●	●	Buy	$$
Mobile Surveys Itracks, p. 77					●	Both				●	●			●	●	●	●		

Integrated Interviewing Software	Operating System					Design Tool	Types of Data Collection								Features			Purchasing	
Software Title Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	CAPI	CASI	CATI	Web	E-mail	Paper	Scanning	Keypad Entry	Tabulation	Statistics	Visual Tools	Buy or Lease	Price Range
Morae TechSmith Corporation, p. 81	●					GUI								●		●	●	Buy	$$
Online Focus Groups Itracks, p. 77					●	GUI				●				●	●	●	●		
Opinionmeter's Survey Manager Opinionmeter International, p. 79	●					GUI	●			●	●	●	●		●	●	●	Either	$$
QPSMR CATI QPSMR Ltd., p. 79	●					Both	●	●	●		●	●		●	●	●		Lease	$$$$
QPSMR Insight QPSMR Ltd., p. 79	●					Both	●				●	●		●	●	●		Lease	$$
Qualmetrix Itracks, p. 77					●	GUI				●					●		●		
QuestDesigner QuestMetrics, p. 80					●	GUI	●	●	●	●	●	●						Lease	$$$$
Raosoft EZSurvey Raosoft, Inc., p. 80	●				●	Both	●	●	●	●	●	●		●				Buy	$
Raosoft SurveyWin Raosoft, Inc., p. 80	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$
Results for Research 6.0 RONIN Corporation, p. 80	●				●	Both	●	●	●	●								Buy	
Snap Professional Snap Surveys, Ltd., p. 80	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$$$
SODA - Survey on Demand Application Techneos Systems Inc., p. 81	●				●	Both	●	●										Lease	
SSI Web Sawtooth Software, Inc., p. 80	●				●	Both	●	●	●	●	●	●		●	●	●	●		
StatPac Survey Software StatPac, Inc., p. 81	●					Syntax			●	●	●	●		●	●	●	●	Buy	$$
Survey Genie William Steinberg Consultants, Inc., p. 81	●					GUI				●	●	●		●	●	●	●	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 81	●					GUI		●		●	●	●		●	●	●	●	Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 78	●				●	GUI			●	●	●	●	●	●				Buy	
Survey Tools for Windows William Steinberg Consultants, Inc., p. 81	●					GUI		●		●	●	●		●	●	●	●	Buy	$$
SurveyPro Apian Software, p. 72	●					GUI	●	●	●	●	●	●	●	●	●	●	●	Buy	$$$
The Survey Cybernetic Solutions The Survey Software, p. 75	●					GUI				●	●	●		●	●	●	●	Buy	$
The Survey System - CATI Creative Research Systems, p. 74	●					GUI	●	●	●	●	●	●		●	●	●			$$$
The Survey System (Version 10.0) Creative Research Systems, p. 74	●					GUI	●	●	●	●	●	●		●	●	●		Buy	$$
Virtual Call Center Network Itracks, p. 77					●	GUI			●	●					●	●	●		
Voxco Command Center Voxco (Voxco Group), p. 82					●	GUI	●	●	●	●					●	●		Either	
webCATI CfMC-U.K., p. 74			●	●	●	Both	●		●						●			Lease	
webSurvent CfMC-U.K., p. 74			●	●	●	Both	●		●	●					●	●		Lease	
WinCATI Mixed Mode Sawtooth Technologies, Inc., p. 80	●					Both			●	●					●	●	●	Buy	

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

Paper-based/Scan Survey Software	Operating System		Design Tool	Types of Data Collection					Features	Purchasing	
Software Title Company/Listing page #	Win	Web	Graphic User Interface or Script	OCR	OMR	Bar Code	Pre-Printed	Hand-Written	Tabulation & Analysis Tools	Buy or Lease	Price Range
Confirmit Confirmit, p. 74	●	●	GUI	●	●	●	●	●	Yes	Lease	
Eform Beach Tech Corporation, p. 72	●	●	Both		●	●			Yes	Either	
EFS Employee Globalpark Inc., p. 76		●	GUI	●						Lease	
EFS Leadership Globalpark Inc., p. 76		●	GUI	●						Lease	
EFS Panel Globalpark Inc., p. 76		●	Both	●						Lease	
EFS Survey Globalpark Inc., p. 76		●	GUI	●						Lease	
ExpertScan AutoData Systems, p. 72	●		GUI	●	●	●		●	Yes	Buy	$$$$
FACTS Optimum Solutions Corp., p. 79	●		GUI	●	●	●	●	●	No	Lease	
IBM SPSS Data Collection Paper IBM SPSS software, p. 77	●		Both						Add-on		
IBM SPSS Data Collection Scan IBM SPSS software, p. 77	●		Both	●	●	●	●	●	Add-on		
Inquisite Survey Inquisite Inc., p. 77	●	●	GUI		●				Yes	Either	$$$$
MarketTools CustomerSat MarketTools, Inc., p. 78		●	GUI							Either	
Opinionmeter's Survey Manager Opinionmeter International, p. 79	●		GUI		●				Yes	Either	$$
Raosoft SurveyWin Raosoft, Inc., p. 80	●		GUI	●	●				Yes	Buy	$
ReadSoft Documents for Forms ReadSoft, Inc., p. 80	●		GUI	●	●	●	●	●	Add-on	Buy	$$$$
Remark Classic OMR Gravic, Inc. - Remark Products Group, p. 76			GUI						Yes	Buy	$$
Remark Office OMR Gravic, Inc. - Remark Products Group, p. 76	●		GUI						Yes	Buy	$$
Scannable Office AutoData Systems, p. 72	●		GUI	●	●	●	●	●	No	Buy	$$$$
Snap Professional Snap Surveys, Ltd., p. 80	●		GUI	●	●		●	●	Yes	Buy	$$$
Snap Scanning Snap Surveys, Ltd., p. 80	●		GUI	●	●		●	●	Yes	Buy	$$$$
Survey Genie William Steinberg Consultants, Inc., p. 81	●		GUI						Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 81	●		GUI						Yes	Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 78	●	●	GUI	●	●				Yes	Buy	
Survey Select Expert SurveyConnect, Inc., p. 81	●		GUI						Yes	Buy	$$
Survey Tools for Windows William Steinberg Consultants, Inc., p. 81	●		GUI						Yes	Buy	$$
SurveyPro Apian Software, p. 72	●		GUI		●	●			Yes	Buy	$$$

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

CAPI/CASI Software

CAPI/CASI Software	Operating System					Platform				Design Tool	CAPI/CASI Features				Purchasing	
Software Title Company/Listing page #	Win	Mac	Unix	Linux	Web	Desktop	Handheld	Touchscreen	IVR	Graphic User Interface or Script	Audio	Still Images	Video	Tabulation & Analysis Tools	Buy or Lease	Price Range
Abase Advanced Data Research, Inc., p. 72	●					●	●	●		Both	●	●	●	Yes	Buy	$$$$
ACA System Sawtooth Software, Inc., p. 80	●				●	●	●			GUI	●	●	●	Yes		
ACBC System Sawtooth Software, Inc., p. 80					●	●	●			GUI	●	●	●	Yes		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 76	●	●	●	●	●	●	●			Both	●	●	●	Yes	Either	
ARCS® ARCS®, p. 72	●								●	GUI					Either	$$$$
ASDE Survey Sampler - Canada ASDE Survey Sampler, p. 72	●									GUI					Lease	$$
askiaface ASKIA - Software for Surveys (New York), p. 72	●					●				Both	●	●	●		Either	
askiafacemobile ASKIA - Software for Surveys (New York), p. 72	●						●	●		Both					Either	
CBC System Sawtooth Software, Inc., p. 80	●				●	●	●			GUI	●	●	●	Yes		
Checkbox Mobile Survey Checkbox Survey Solutions, Inc, p. 74	●						●			GUI						
Clipstream™ Video MR Clipstream™ Survey, p. 74	●	●	●	●	●					GUI	●	●	●		Either	$
Confirmit Confirmit, p. 74	●				●	●		●	●	GUI	●	●	●	Yes	Lease	
Converso CAPI CONVERSOFT, p. 74	●					●	●	●		Both	●	●	●	Yes	Either	
Converso CASI CONVERSOFT, p. 74	●					●	●	●		Both	●	●	●		Either	
Converso Pocket/Mobile CONVERSOFT, p. 74	●						●	●		Both	●	●		Yes	Either	
CVA System Sawtooth Software, Inc., p. 80	●					●	●			GUI	●	●	●	Yes		
Digivey Survey Suite™ Creoso Corporation, p. 74	●					●	●	●		GUI	●	●	●	Yes	Either	$$
Dub InterViewer Nebu, p. 78	●			●	●	●	●	●		GUI	●	●	●	Add-on	Lease	
Dub InterViewer Nebu USA, p. 79	●					●	●	●		GUI	●	●	●	Add-on	Lease	
Eform Beach Tech Corporation, p. 72	●				●	●			●	Both	●	●		Yes	Either	
EFS Employee Globalpark Inc., p. 76					●		●			GUI			●		Lease	
EFS Leadership Globalpark Inc., p. 76					●		●			GUI			●		Lease	
EFS Panel Globalpark Inc., p. 76					●		●			Both			●		Lease	
EFS Survey Globalpark Inc., p. 76					●		●			GUI			●		Lease	

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
Empathica Customer Experience Mgmt. System Empathica Inc., p. 76					●				●					Yes	Buy	$$$$
Entryware (PDA and Laptop Solution) Techneos Systems Inc., p. 81	●				●	●	●	●		Both	●	●	●	No	Lease	
FACTS Optimum Solutions Corp., p. 79	●									GUI	●				Lease	
ForSurveys Forall Systems, Inc., p. 76					●		●			GUI		●		No	Lease	$$
Hosted Survey Hostedware, p. 77					●		●	●		Both	●	●	●	Add-on	Either	
IBM SPSS Data Collection Interviewer IBM SPSS software, p. 77	●				●	●	●	●		Both	●	●	●	Add-on		
Internet Survey Machine Marketing Masters, p. 78	●	●	●	●	●					GUI			●		Buy	$$$
iSURVEY - Mobile Survey Software iSURVEY, p. 77					●		●	●		GUI		●		No	Buy	$
IT CATI/CAPI/Web Interview Technology, p. 77	●				●					Both				Yes	Buy	$$$$
MarketTools CustomerSat MarketTools, Inc., p. 78					●	●	●		●	GUI					Either	
MaxDiff/Web Sawtooth Software, Inc., p. 80	●				●	●	●			GUI				Yes		$$$
Nearpod Nearpod, p. 78		●					●	●		GUI	●	●	●	Add-on	Either	
NIPO CAPI System NIPO Software, p. 79	●					●	●	●		Both	●	●	●	Add-on	Lease	
Opinionmeter's Survey Manager Opinionmeter International, p. 79	●						●	●		GUI	●	●	●	Yes	Either	$$
Panel Portal - Whole Solution Toluna, p. 82					●	●	●			GUI	●	●	●	Yes		$$$$$
PRO-T-S; GENESYS; ARCS IVR Marketing Systems Group, p. 78	●								●	GUI					Either	
QPSMR CATI QPSMR Ltd., p. 79	●					●	●			Both	●	●	●	Yes	Lease	$$$$
QPSMR Input QPSMR Ltd., p. 79	●					●				GUI		●	●	No		
QPSMR Insight QPSMR Ltd., p. 79	●					●	●			Both		●	●	Yes	Lease	$$
Raosoft EZSurvey Raosoft, Inc., p. 80	●				●	●	●	●		Both	●	●	●	Yes	Buy	$
Raosoft InterForm Raosoft, Inc., p. 80	●				●	●				GUI	●	●	●	Yes	Buy	
Raosoft SurveyWin Raosoft, Inc., p. 80	●					●		●		GUI		●		Add-on	Buy	$
ReForm XT Anyware Mobile Solutions, p. 72					●		●		●	GUI	●	●		Yes		
Results for Research 6.0 RONIN Corporation, p. 80	●				●	●	●	●		Both	●	●	●	Yes	Buy	

CAPI/CASI Software	Operating System					Platform				Design Tool	CAPI/CASI Features				Purchasing	
Software Title Company/Listing page #	Win	Mac	Unix	Linux	Web	Desktop	Handheld	Touchscreen	IVR	Graphic User Interface or Script	Audio	Still Images	Video	Tabulation & Analysis Tools	Buy or Lease	Price Range
Snap Mobile (PDA, Kiosk, Tablet PC) Snap Surveys, Ltd., p. 80	●					●	●	●		GUI	●	●	●	No	Buy	$$
Snap Professional Snap Surveys, Ltd., p. 80	●					●	●	●		GUI	●	●	●	Yes	Buy	$$$
SODA - Survey on Demand Application Techneos Systems Inc., p. 81	●				●	●	●	●		Both	●	●	●	No	Lease	
SSI Web Sawtooth Software, Inc., p. 80	●				●	●	●			Both	●	●	●	Yes		
Survent CfMC Solutions for Research, p. 74	●		●	●	●	●				Syntax	●			Yes	Lease	
Survent CfMC-U.K., p. 74			●	●		●	●			Syntax	●	●	●	Yes	Lease	
Survey Genie William Steinberg Consultants, Inc., p. 81	●					●				GUI				Yes	Buy	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 81	●					●				GUI				Yes	Buy	$
Survey Tools for Windows William Steinberg Consultants, Inc., p. 81	●					●				GUI				Yes	Buy	$$
SurveyPro Apian Software, p. 72	●					●		●		GUI		●		Yes	Buy	$$$
SurveyToGo Dooblo, Ltd., p. 76	●				●	●	●	●			●	●	●		Lease	$
The Survey System - CATI Creative Research Systems, p. 74	●					●	●			GUI	●	●	●	Yes		$$$
The Survey System - PDA Creative Research Systems, p. 74	●						●						●	No	Buy	$
The Survey System - Web Creative Research Systems, p. 74	●						●			GUI						$$
The Survey System (Version 10.0) Creative Research Systems, p. 74	●						●	●		GUI	●	●	●	Yes	Buy	$$
TPL Tables QQQ Software, Inc., p. 79	●		●	●						Both			●		Buy	$$
Voxco Command Center Voxco (Voxco Group), p. 82					●	●			●	GUI	●	●	●	Yes	Either	
webCATI CfMC-U.K., p. 74			●	●	●	●	●			Both	●	●	●	Yes	Lease	
WinQuery The Analytical Group, Inc., p. 72	●					●		●		Both	●	●	●	Yes	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
askiavoice ASKIA - Software for Surveys (New York), p. 72	●					Both	●	●	Yes		
Confirmit Confirmit, p. 74	●				●	GUI	●	●	Yes	Lease	
Converso CATI CONVERSOFT, p. 74	●					Both	●	●	Yes	Either	
Dub InterViewer Nebu, p. 78	●			●	●	GUI	●	●	Yes	Lease	
Dub InterViewer Nebu USA, p. 79	●					GUI	●	●	Yes	Lease	
Eform Beach Tech Corporation, p. 72	●				●	Both			Yes	Either	
ESRI Business Analyst Desktop ESRI, p. 76	●								Yes	Buy	$$$$
IBM SPSS Data Collection Dialer IBM SPSS software, p. 77	●						●	●	Add-on		
IBM SPSS Data Collection Interviewer IBM SPSS software, p. 77	●				●	Both	●	●	Add-on		
Ioxphere Xorbix Technologies, Inc., p. 82	●	●			●	GUI	●	●	Yes	Either	$$
IT CATI/CAPI/Web Interview Technology, p. 77	●				●	Both			Yes	Buy	$$$$

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
Itracks Online CATI Itracks, p. 77					●	Both	●	●	Yes		
MarketTools CustomerSat MarketTools, Inc., p. 78					●	GUI	●	●	Yes	Either	
NIPO Fieldwork System for CATI/Web Interviewing NIPO Software, p. 79	●					Both	●	●	Add-on	Lease	
Panel Portal - Only for Scripting Toluna, p. 82					●	GUI	●		Add-on		$$$$
Panel Portal - Whole Solution Toluna, p. 82					●	GUI	●		Yes		$$$$
Pronto Voxco (Voxco Group), p. 82					●	GUI		●		Either	
QPSMR CATI QPSMR Ltd., p. 79	●					Both	●	●	Yes	Lease	$$$$
Raosoft EZSurvey Raosoft, Inc., p. 80	●				●	Both	●		Add-on	Buy	$
Raosoft InterForm Raosoft, Inc., p. 80	●				●	GUI	●		Add-on	Buy	
Raosoft SurveyWin Raosoft, Inc., p. 80	●					GUI	●		Add-on	Buy	$
Results for Research 6.0 RONIN Corporation, p. 80	●				●	Both	●	●	Yes	Buy	
Snap Professional Snap Surveys, Ltd., p. 80	●					GUI			Yes	Buy	$$$
StatPac Survey Software StatPac, Inc., p. 81	●					Syntax			Yes	Buy	$$
Survent CfMC Solutions for Research, p. 74	●		●	●	●	Syntax	●	●	Yes	Lease	
Survent CfMC-U.K., p. 74			●	●		Syntax	●	●	Yes	Lease	
Survey Said Enterprise Edition Marketing Masters, p. 78	●				●	GUI			Yes	Buy	
SurveyPro Apian Software, p. 72	●					GUI			Yes	Buy	$$$
The Survey Cybernetic Solutions - The Survey Software, p. 75	●					GUI	●		Yes	Buy	$
The Survey System - CATI Creative Research Systems, p. 74	●					GUI	●		Yes		$$$
The Survey System - PDA Creative Research Systems, p. 74	●								No	Buy	$
The Survey System (Version 10.0) Creative Research Systems, p. 74	●					GUI	●		Yes	Buy	$$
Virtual Call Center Network Itracks, p. 77					●	GUI	●	●	Yes		
Voxco Command Center Voxco (Voxco Group), p. 82					●	GUI	●	●	Yes	Either	
webCATI CfMC Solutions for Research, p. 74	●			●	●	Both	●	●	Yes		
webCATI CfMC-U.K., p. 74			●	●	●	Both	●	●	Yes	Lease	
WinCATI Sawtooth Technologies, Inc., p. 80	●					Both	●	●	Yes	Buy	
WinQuery The Analytical Group, Inc., p. 72	●					Both	●	●	Yes	Buy	$

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

Web Interviewing Software Solutions

Software Title Company/Listing page #	Operating System: Win	Mac	Unix	Linux	Web	Design Tool: Graphic User Interface or Script	Web Interviewing Features: Data Collection (Web or E-mail)	Web Security	Quota Control	Tabulation & Analysis Tools	Real-Time Reports	Purchasing: Buy or Lease	Price Range
ACA System Sawtooth Software, Inc., p. 80	●				●	GUI	Web	●	●	Yes	●		
ACBC System Sawtooth Software, Inc., p. 80					●	GUI	Web	●	●	Yes	●		
AccessPoint for Market Research Global Bay Mobile Technologies, p. 76	●	●	●	●	●	Both	Web	●	●	Yes	●	Either	
activeGROUP ION Suite activeGROUP Ventures, Inc., p. 72	●	●					Web	●		No		Lease	
ARCS® ARCS®, p. 72	●					GUI	Web	●	●	No	●	Either	$$$$
askiaweb ASKIA - Software for Surveys (New York), p. 72	●					GUI	Both	●	●	Yes	●		
AttentionTracking MediaAnalyzer Software & Research, Inc., p. 78	●				●	GUI	Web	●	●	Yes	●	Lease	
Automated Tracker Cint USA Inc., p. 74					●	GUI	E-mail	●	●	No	●	Buy	$
BayaSoft Custom Development BayaSoft LLC, p. 72					●		Both	●	●	Yes		Lease	
BayaSoft RTD - Real Time Data BayaSoft LLC, p. 72					●		Both	●	●	Yes	●	Lease	
BayaSoft RTR - Real Time Reporting BayaSoft LLC, p. 72					●		Both	●	●	Yes	●	Lease	
Bulletin Board Focus Groups Itracks, p. 77					●	GUI	Web	●	●	Yes	●		
CBC System Sawtooth Software, Inc., p. 80	●				●	GUI	Web	●	●	Yes	●		
Checkbox Mobile Survey Checkbox Survey Solutions, Inc, p. 74	●					GUI	Web			Yes			
Checkbox Survey Checkbox Survey Solutions, Inc, p. 74	●					GUI	Both	●	●	Yes	●	Either	$$
Clipstream™ Video MR Clipstream™ Survey, p. 74	●	●	●	●	●	GUI	Web			No		Either	$
Confirmit Confirmit, p. 74	●				●	GUI	Both	●	●	Yes	●	Lease	
Converso CAWI CONVERSOFT, p. 74	●					Both	Web	●	●	Yes	●	Either	
Converso Enterprise CONVERSOFT, p. 74					●		Web						
Custom Panel Building Itracks, p. 77					●	GUI	Web	●	●	Yes	●		
CVA System Sawtooth Software, Inc., p. 80	●					GUI		●					
Digivey Survey Suite™ Creoso Corporation, p. 74	●					GUI	Both	●	●	Yes	●	Either	$$
Dub InterViewer Nebu, p. 78	●			●	●	GUI	Web	●	●	Add-on		Lease	
Dub InterViewer Nebu USA, p. 79	●					GUI	Web	●	●	Add-on		Lease	
Eform Beach Tech Corporation, p. 72	●				●	Both		●	●	Yes		Either	
EFS Employee Globalpark Inc., p. 76					●	GUI	Web	●	●	Yes	●	Lease	
EFS Leadership Globalpark Inc., p. 76					●	GUI	Web	●	●	Yes	●	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
EFS Panel Globalpark Inc., p. 76					●	Both	Web	●	●	Yes	●	Lease	
EFS Survey Globalpark Inc., p. 76					●	GUI	Web	●	●	Yes	●	Lease	
Empathica Customer Experience Mgmt. System Empathica Inc., p. 76					●		Web	●	●	Yes	●	Buy	$$$$
Eval Builder Your Perceptions, Inc., p. 82	●				●	Both	Both	●		Yes	●	Lease	
FindLocation.com Xionetic Technologies, Inc., p. 82					●	GUI	Web					Buy	
FocusVision Video Streaming FocusVision Worldwide, p. 76							Web						
Fusion Vision Critical, p. 82					●	GUI	Web	●		Yes	●	Lease	
Hosted Survey Hostedware, p. 77					●	Both	Both	●	●	Add-on	●	Either	
Hosted Survey Lite Hostedware, p. 77					●		Web						
IBM SPSS Data Collection Interviewer IBM SPSS software, p. 77	●				●	Both	Both	●	●	Add-on	●		
IdeaMap®.Net Moskowitz Jacobs Inc., p. 78					●	GUI	Web	●	●	Yes	●		
In-Depth Interviews VisionsLive Limited, p. 82													
Inquisite Survey Inquisite Inc., p. 77	●				●	GUI	Web	●	●	Yes	●	Either	$$$$
Intellisurvey Intellisurvey, Inc., p. 77					●	Both	Web	●	●	Yes	●		
Internet Research Manager Domestic Data, p. 76	●					GUI	Both	●	●	No	●	Lease	$$$$
Internet Survey Machine Marketing Masters, p. 78	●	●	●	●	●	GUI	Web	●		Yes	●	Buy	$$$
Ioxphere Xorbix Technologies, Inc., p. 82	●	●			●	GUI	Both	●	●	Yes	●	Either	$$
IT CATI/CAPI/Web Interview Technology, p. 77	●				●	Both				Yes		Buy	$$$$
Itracks Online Surveys Itracks, p. 77					●	Both	Web	●	●	Yes	●		
Kinesis Survey Kinesis Survey Technologies, LLC, p. 78				●	●	GUI	Web	●	●	Yes	●	Lease	$$$
MarketTools Community Manager MarketTools, Inc., p. 78					●	GUI	Both	●	●	Yes	●	Lease	
MarketTools CustomerSat MarketTools, Inc., p. 78					●	GUI	Both	●		Yes	●	Either	
MarketTools Survey Manager MarketTools, Inc., p. 78					●	GUI	Both	●	●	Yes	●	Lease	
MarketTools TrueSample MarketTools, Inc., p. 78					●	Both	Web				●	Lease	
MaxDiff/Web Sawtooth Software, Inc., p. 80	●				●	GUI	Web	●	●	Yes	●		$$$
Mobile Surveys Itracks, p. 77					●	Both	Both	●	●	Yes	●		
NetE-nable AutoData Systems, p. 72	●					GUI	Web			Yes		Lease	$$
NIPO Fieldwork System for CATI/Web Interviewing NIPO Software, p. 79	●					Both	Both			Add-on		Lease	
Online Focus Groups Itracks, p. 77					●	GUI	Web	●	●	Yes	●		

$ = $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
Online Focus Groups 2.0 VisionsLive Limited, p. 82													
Opinio ObjectPlanet AS, p. 79	●	●	●	●	●		Both	●		Yes	●	Either	$
Opinionmeter's Survey Manager Opinionmeter International, p. 79	●					GUI	Both			Yes	●	Either	$$
Panel Manager Cint USA Inc., p. 74					●	GUI	E-mail	●		No	●	Buy	$
Panel Portal - Only for Scripting Toluna, p. 82					●	GUI	Both	●	●	Add-on	●		$$$$
Panel Portal - Whole Solution Toluna, p. 82					●	GUI	Both	●	●	Yes	●		$$$$
PRO-T-S; GENESYS; ARCS IVR Marketing Systems Group, p. 78	●					GUI	Web	●	●		●	Either	
QualAnywhere™ 20|20 Technology, p. 82					●	GUI						Lease	
QualBoard™ 20|20 Technology, p. 82					●	GUI	Web			Yes		Either	
QualJournal™ 20|20 Technology, p. 82					●	GUI	Web	●		Yes	●	Either	
QualLink™ 20|20 Technology, p. 82					●	GUI	Web			Yes		Lease	
QualMeeting™ 20|20 Technology, p. 82					●	GUI	Web	●		Yes	●	Lease	
Qualtrics Qualtrics, p. 79					●	Both	Both	●	●	Yes	●	Buy	
QueryWeb The Analytical Group, Inc., p. 72	●					Both	Web	●	●	Yes	●	Buy	$$$$
QuestionPro Survey Analytics, p. 81					●	GUI	Web	●	●	Yes	●	Either	$$
QuestionPro MicroPoll Survey Analytics, p. 81					●	GUI	Both						
QuestServer QuestMetrics, p. 80					●	GUI	Web			No		Lease	$$$
QuickQual™ 20|20 Technology, p. 82					●	GUI	Web			Yes		Lease	
Raosoft EZReport Raosoft, Inc., p. 80	●					Both	Both			Yes	●	Buy	$
Raosoft EZSurvey Raosoft, Inc., p. 80	●				●	Both	Both	●		Add-on	●	Buy	$
Raosoft InterForm Raosoft, Inc., p. 80	●				●	GUI	Web	●		Add-on		Buy	
Remark Web Survey Professional Gravic, Inc. - Remark Products Group, p. 76						Both	Both			Yes		Buy	$$
Remark Web Survey Standard Gravic, Inc. - Remark Products Group, p. 76						Both	Both			Yes		Buy	$
Research Reporter Research Reporter, p. 80					●			●	●	Add-on	●	Either	$$$$
Results for Research 6.0 RONIN Corporation, p. 80	●				●	Both	Web	●	●	Yes	●	Buy	
Revelation Revelation, p. 80							Web	●			●		
Sample Access Cint USA Inc., p. 74					●	GUI	E-mail	●	●	No	●	Buy	$
Sensus Web Sawtooth Technologies, Inc., p. 80	●					Both	Web	●	●	Yes		Buy	
Snap Professional Snap Surveys, Ltd., p. 80	●					GUI	Both	●	●	Yes	●	Buy	$$$

Web Interviewing Software Solutions	Operating System					Design Tool	Web Interviewing Features					Purchasing	
Software Title Company/Listing page #	Win	Mac	Unix	Linux	Web	Graphic User Interface or Script	Data Collection (Web or E-mail)	Web Security	Quota Control	Tabulation & Analysis Tools	Real-Time Reports	Buy or Lease	Price Range
Snap Webhost Snap Surveys, Ltd., p. 80	●					GUI	Both	●	●	Yes	●	Either	$$$$
Software G3 plus Rogator AG, p. 80	●		●	●		GUI	Both	●	●	Yes	●	Either	
Sparq Vision Critical, p. 82					●	GUI	Web	●	●	Yes	●	Lease	
SpeakSurveys VisionsLive Limited, p. 82													
SSI Web Sawtooth Software, Inc., p. 80	●				●	Both	Web	●	●	Yes	●		
StatPac Survey Software StatPac, Inc., p. 81	●					Syntax	Both	●		Add-on		Buy	$$
StyleMap®.Net Moskowitz Jacobs Inc., p. 78					●	GUI	Web	●	●	Yes	●		
Survey Console Survey Analytics, p. 81					●	GUI	Both	●	●	Yes	●	Lease	$
Survey Genie - Gold William Steinberg Consultants, Inc., p. 81	●					GUI	Both			Yes		Buy	$
Survey Said Enterprise Edition Marketing Masters, p. 78	●				●	GUI	Web			Yes		Buy	
Survey Select Expert SurveyConnect, Inc., p. 81	●					GUI	Both	●		Yes		Buy	$$
Survey Tools for Windows William Steinberg Consultants, Inc., p. 81	●					GUI	Both			Yes		Buy	$$
SurveyPro Apian Software, p. 72	●					GUI	Both	●	●	Yes	●	Buy	$$$
SurveySquare.com www.SurveySquare.com, p. 81	●					Both	Both	●	●	Yes	●	Lease	$$
SurveyWriter SurveyWriter, p. 81					●	GUI	Both	●	●	Yes	●	Either	$
TestKit Hexworx Computer Services P/L, p. 76	●		●	●	●	Both	Web			Yes		Buy	$
The Survey Cybernetic Solutions - The Survey Software, p. 75	●					GUI	Both	●		Yes		Buy	$
The Survey System - CATI Creative Research Systems, p. 74	●					GUI	Both	●	●	Yes	●		$$$
The Survey System - PDA Creative Research Systems, p. 74	●						Both	●	●	Add-on	●	Buy	$
The Survey System - Web Creative Research Systems, p. 74	●					GUI	Both	●	●	Yes	●		$$
The Survey System (Version 10.0) Creative Research Systems, p. 74	●					GUI	Both	●	●	Yes	●	Buy	$$
Think Virtual Fieldwork Think Virtual Fieldwork, p. 81					●		Both						
Vovici 6 Vovici Corporation, p. 82					●	GUI	Both	●		Yes	●	Either	$$$$
Vovici Online Survey Solutions Vovici Corporation, p. 82						GUI	Both			Yes		Either	$$$$
Voxco Command Center Voxco (Voxco Group), p. 82					●	GUI	Web	●	●	Yes	●	Either	
webCATI CfMC-U.K., p. 74			●	●	●	Both	Web	●	●	Yes	●	Lease	
webSurvent CfMC Solutions for Research, p. 74	●		●	●	●	Both	Web	●	●	Add-on	●	Lease	
webSurvent CfMC-U.K., p. 74			●	●	●	Both	Web	●	●	Yes	●	Lease	
Zoomerang Online Survey And Polls MarketTools, Inc., p. 78					●	GUI	Both	●	●	Yes	●	Lease	$

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

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. 80	●																
3D VOG SensoMotoric Instruments, p. 80	●																
AccessPoint for Market Research Global Bay Mobile Technologies, p. 76	●							●	●								
activeGROUP ION Suite activeGROUP Ventures, Inc., p. 72											●						●
Address Coder ESRI, p. 76		●					●										
ARCS® ARCS®, p. 72												●					
ASDE Survey Sampler - Canada ASDE Survey Sampler, p. 72															●		
ASDE Survey Sampler - USA ASDE Survey Sampler, p. 72															●		
Automated Tracker Cint USA Inc., p. 74								●							●		
Beacon Decipher, p. 75												●					
Brand Profiler WRC Research Systems, Inc., p. 82					●												
BrandMap WRC Research Systems, Inc., p. 82					●												
BrandTrend WRC Research Systems, Inc., p. 82				●													
Bulletin Board Focus Groups Itracks, p. 77											●						
E-Tabs Professional Reader E-Tabs, p. 76				●													
E-Tabs Verify E-Tabs, p. 76		●		●													
E-Tabs Writer E-Tabs, p. 76				●													
Eval Builder Your Perceptions, Inc., p. 82	●																
EzTab New Age Media Systems, Inc., p. 79				●	●												
FACTS Optimum Solutions Corp., p. 79		●		●													
FindLocation.com Xionetic Technologies, Inc., p. 82						●	●										
FocusVision InterVu FocusVision Worldwide, p. 76											●						
FocusVision Video Streaming FocusVision Worldwide, p. 76									●								●
Forecast Pro Business Forecast Systems, p. 72						●											
Forecast Pro Unlimited Business Forecast Systems, p. 72						●											

Miscellaneous Software

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
Forecast Pro XE Business Forecast Systems, p. 72						•											
GENESYS Sampling Systems GENESYS Sampling Systems, p. 76															•		
GOLDMineR® Statistical Innovations Inc., p. 81					•												
Infotools ESPRI Infotools, p. 77					•	•											
Infotools HARMONI Infotools, p. 77					•	•											
InterQue Online Focus Group and BBS Software Crusader Services, p. 75											•						
Ioxphere Xorbix Technologies, Inc., p. 82	•																•
iViewX SensoMotoric Instruments, p. 80	•																
Kinesis Survey Kinesis Survey Technologies, LLC, p. 78												•					
KMRQuest KMR Group, p. 78					•	•	•										
Latent GOLD® Statistical Innovations Inc., p. 81					•												
LogXact Cytel Inc., p. 75						•											
MAIA Market Attitude & Intent Analysis Hamilton-Locke, Inc. - Verbatim Analysis, p. 76						•											•
MapInfo Tetrad Computer Applications, Inc., p. 81						•	•										
MapInfo Professional/MapX Pitney Bowes MapInfo, p. 79							•										
MapPoint Tetrad Computer Applications, Inc., p. 81						•											
Maptitude Caliper Corporation, p. 72							•										
Maptitude for Redistricting Caliper Corporation, p. 72							•										
Maptitude for the Web Caliper Corporation, p. 72																	•
Market-i Competitive INtelligence Software Line of Sight, p. 78						•											
MarketSight® MarketSight LLC, p. 78		•		•	•	•											
MarketTools CustomerSat MarketTools, Inc., p. 78									•		•	•			•		
MarketTools Panel Manager MarketTools, Inc., p. 78												•					
MarketTools TrueSample MarketTools, Inc., p. 78		•										•					
MARS Salford Systems, p. 80						•											

Miscellaneous Software

Software Title Company/Listing page #	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/ Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tagline Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling System	Translation	Web Usability
Mentor CfMC Solutions for Research, p. 74		●			●												
Mentor CfMC-U.K., p. 74		●															
Microtab Version 7 - Prof with SPSS Add-on Module Microtab, Inc., p. 78		●														●	
Microtab Version 7 - Professional Edition Microtab, Inc., p. 78		●															
Microtab Version 7 - Standard Edition Microtab, Inc., p. 78		●															
MiningSolv Decision Support Sciences, p. 75					●												
M-Link The Analytical Group, Inc., p. 72			●														
MM4XL 7.2 MarketingStat, p. 78					●	●									●		
Morae TechSmith Corporation, p. 81									●								●
MPE Data Entry & Editing DATAN, Inc., p. 75					●	●											
MRCC™ - Market Research Cost Calculator MR Solutions Worldwide Ltd., p. 78						●											
MRDCL Marketing and Research Data Consultants, p. 78		●															
mTAB Research Analysis System PAI-Productive Access, Inc., p. 79					●	●											
My Virtual Focus Facility InsideHeads, LLC, p. 77								●	●	●	●						●
Nearpod Nearpod, p. 78	●				●												
Nvision Script NIPO Software, p. 79		●															
NVivo QSR International (Americas) Ltd., p. 79						●											
Online Focus Groups Itracks, p. 77									●								
Online Focus Groups 2.0 VisionsLive Limited, p. 82											●						
OnTraq Marketing and Research Data Consultants, p. 78		●															
Panel Manager Cint USA Inc., p. 74												●					
Panel Manager Voxco (Voxco Group), p. 82												●			●		
PCensus Tetrad Computer Applications, Inc., p. 81							●										
PEER Forecaster Delphus, Inc., p. 76						●											
PEER Planner for Windows Delphus, Inc., p. 76						●											

Miscellaneous Software

Software Title Company/Listing page #	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/ Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tagline Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling System	Translation	Web Usability
Perception Analyzer Dialsmith - Perception Analyzer, p. 76	●																
PositionSolve Decision Support Sciences, p. 75					●												
Postal Carrier Route Polygons Sammamish Data Systems, Inc., p. 80							●										
PrefSolv Decision Support Sciences, p. 75					●												
Progression™ Lidlow Worldwide, p. 78											●						
Pronto Voxco (Voxco Group), p. 82														●			
PRO-T-S® Telephony Systems PRO-T-S® Telephony Systems, p. 79														●			
P-STAT P-STAT, Inc., p. 79		●				●									●		
Q Basic Q Market Research Software, p. 79		●															
QBAL Jan Werner Data Processing, p. 82															●		
QGEN Jan Werner Data Processing, p. 82		●															
Q-Leap The Analytical Group, Inc., p. 72			●														
QPSMR CATI QPSMR Ltd., p. 79						●											
QPSMR Reflect QPSMR Ltd., p. 79						●											
QualAnywhere™ 20|20 Technology, p. 82											●						
QualBoard™ 20|20 Technology, p. 82										●	●						●
QualJournal™ 20|20 Technology, p. 82											●	●					
QualLink™ 20|20 Technology, p. 82										●	●						●
QualMeeting™ 20|20 Technology, p. 82											●						●
Qualtrics Qualtrics, p. 79												●			●		
QuestionPro Survey Analytics, p. 81						●					●						
Quick Tally Quick Tally Audience Response Systems, Inc., p. 80	●																
QuickQual™ 20|20 Technology, p. 82										●	●						●
Raosoft EZReport Raosoft, Inc., p. 80					●	●											
Raosoft EZSurvey Raosoft, Inc., p. 80						●											

Miscellaneous Software

Software Title Company/Listing page #	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/ Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tagline Development	Online Focus Group	Panel Management	Phone Number Screening	Predictive Dialing	Sampling System	Translation	Web Usability
Raosoft InterForm Raosoft, Inc., p. 80						●											
Raosoft SurveyWin Raosoft, Inc., p. 80						●											
Reply Fleetwood Group, Inc., p. 76	●					●											
Report Direct Marketing and Research Data Consultants, p. 78				●													
Research Reporter Research Reporter, p. 80				●	●	●		●									
Research Tracker II MDSS, Inc., p. 78							●	●	●			●			●		
Research Tracker II for Medical Respondents MDSS, Inc., p. 78							●	●	●			●			●		
Revelation Revelation, p. 80											●						
Rosetta Studio ATP Canada Software and Services Ltd., p. 72						●											
Ruby COM Red Centre Software Pty Ltd, p. 80						●											
Ruby LASER Red Centre Software Pty Ltd, p. 80						●											
Sample Access Cint USA Inc., p. 74								●							●		
SampleMarket uSamp™ (United Sample, Inc.), p. 82												●			●		
SegmentSolv Decision Support Sciences, p. 75					●												
SI-CHAID® Statistical Innovations Inc., p. 81					●												
SmartForecasts® Smart Software, Inc., p. 80		●				●											
Snap Survey Software Snap Surveys, Ltd., p. 80																	
Software G3 plus Rogator AG, p. 80				●	●		●	●			●	●					
Sparq Vision Critical, p. 82												●					
Sp-Link The Analytical Group, Inc., p. 72			●														
SSI - SNAP Survey Sampling International, p. 81							●						●		●		
Statbeans StatPoint Technologies, Inc., p. 81					●	●											
Statgraphics Centurion XVI.I Bilingual StatPoint Technologies, Inc., p. 81					●	●											
Statgraphics Centurion XVI.I Multilingual StatPoint Technologies, Inc., p. 81					●	●											
Statgraphics Centurion XVI.I Professional StatPoint Technologies, Inc., p. 81					●	●											

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
Statgraphics Online StatPoint Technologies, Inc., p. 81					•	•											
Statgraphics.Net StatPoint Technologies, Inc., p. 81					•	•											
STATISTICA StatSoft, Inc., p. 81		•			•												
Statistics Calculator StatPac, Inc., p. 81						•											
StatXact Procs for SAS Users Cytel Inc., p. 75						•											
Surview Sales Media Research Edition Bruce Bell & Associates, Inc., p. 72						•											
The Rite Site Easy Analytic Software, Inc., p. 76							•										
The Survey System - CATI Creative Research Systems, p. 74												•					
The Survey System - Web Creative Research Systems, p. 74												•					
The Survey System (Version 10.0) Creative Research Systems, p. 74					•	•						•					
TransCAD Caliper Corporation, p. 72							•										
Usort The Uncle Group, Inc., p. 82		•															
U-Tab™ Weeks Computing Services, p. 82				•	•												
Vertical Mapper Tetrad Computer Applications, Inc., p. 81						•											
Virtual Call Center Network Itracks, p. 77								•									
Vovici 6 Vovici Corporation, p. 82															•		
Voxco Command Center Voxco (Voxco Group), p. 82		•						•						•		•	
Voxco Insight Publisher (V.I.P.) Voxco (Voxco Group), p. 82		•		•													
WinLink The Analytical Group, Inc., p. 72			•														
XSight QSR International (Americas) Ltd., p. 79											•						
Zip + 2 Polygons Sammamish Data Systems, Inc., p. 80							•										
Zip + 4 Centroids Sammamish Data Systems, Inc., p. 80							•										
Zip Code Polygons Sammamish Data Systems, Inc., p. 80							•										
Zipfind Deluxe Xionetic Technologies, Inc., p. 82		•					•	•									

index of advertisers

trade talk

By Joseph Rydholm
Quirk's editor

Two books deliver complementary takes on qualitative

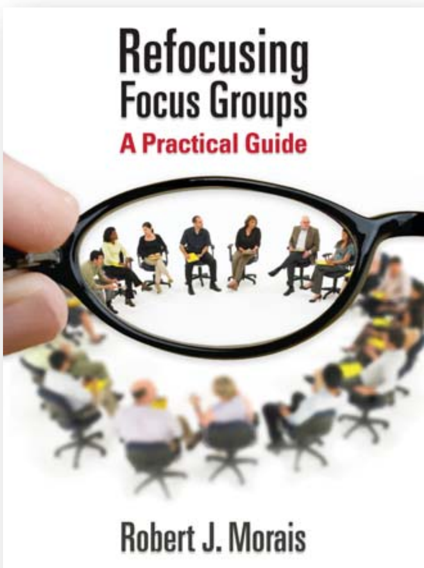
Anecdotal evidence - and some distressing tales from facility owners - would attest that 2010 was a bad year for the focus group. True, the picture brightened a bit as the year went along but of all the types of research that marketers cut back on during the recession's darkest days, the venerable focus group seemed to be at the top of many budget-cutting lists.

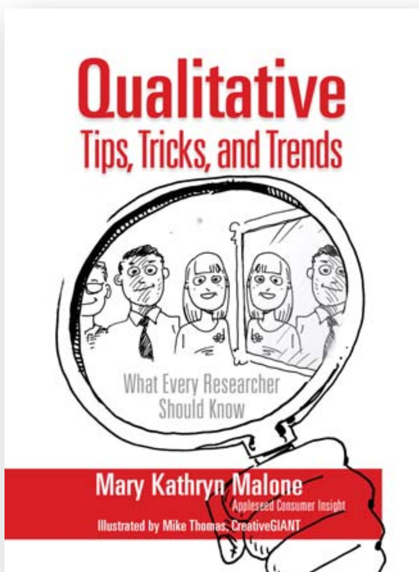
Things seem to be picking up for 2011 at the time of this writing (January) and if you're planning to wade back into the qualitative waters, I have two books you might want to take along with you. They're both short, easy reads but despite their slim page-counts they have a lot to offer and complement each other nicely, combining to give an informed picture of some of the theoretical and practical aspects of in-person qualitative.

First up is *Refocusing Focus Groups* by Robert J. Morais, a principal at New York research firm Weinman Schnee Morais and a frequent *Quirk's* author. Morais offers 60 brief chapters, grouped by the various aspects of the focus group process (planning, observing, analyzing) and bearing titles such as "Know who you're inviting," "The customer is not always right" and "Make the warm-up warmer."

Morais gives us the benefit of his experiences, in the hopes that we can avoid some of the situations he has encountered. Like the time when a group of women recruited for an observational research project on floor cleaners turned out not to be users of the product in question but instead used a lookalike store brand. The packaging was similar enough that the respondents referred to the product as the national brand, even though it was a generic equivalent. The lesson: For future projects, have potential respondents read and describe the label of the brand in their cupboard during the phone recruiting phase.

Other stories come from a more positive





place, such as the insights that arose during some qualitative research on breakfast cereal when the interviewers stripped the questioning down to one basic topic: What is breakfast? Morais reports that by going naïve, the researchers uncovered some valuable, emotion-based insights for their brand.

In one of my favorite passages, Morais likens the process of backroom observation to the film *Rashomon*, the Akira Kurosawa classic that explores the shifting definition of truth via multiple recountings of the rape of a woman and the murder of her samurai husband. While focus groups nominally deal with topics of much less gravity (though try telling that to some brand managers or ad creative types), the reminder that each focus group viewer in the back room brings his or her own perspectives, opinions and biases to the process should be required reading for every participant observer. Only by acknowledging that their viewpoints may be colored by their own needs can marketers hope to fully use the truths uncovered during the research.

In-the-trenches level

Mary Kathryn Malone of Appleseed Consumer Insight also goes in-depth on the qualitative process in her book *Qualitative Tips, Tricks and Trends*, though on a bit more operational, in-the-trenches level than Morais, whose approach leans more toward the philosophical.

Along with discussions of homework assignments, scheduling and incentives, there are informative and, dare I say, entertaining chapters on recruiting (including a look at some of the potential horrors of recruiting by Craigslist) and working with facilities, field agencies and hostesses.

While many readers may not have direct involvement in all of the facets she writes about - at various points, she could be addressing a moderator, a client or a facility manager - all of the actors in the qualitative process can benefit from learning more about the issues facing their colleagues. And when it's delivered with this kind of commitment and sincerity, the education is downright enjoyable. | Q

Refocusing Focus Groups (140 pages; $19.95), by Robert J. Morais, and *Qualitative Tips, Tricks and Trends* (120 pages; $19.95), by Mary Kathryn Malone, are published by Paramount Market Publishing (www.paramountbooks.com).

Coming in the March issue...

Condé Nast offers tips on researching iPad owners

Based on a multifaceted exploration of iPad usage among early adopters, researchers from Condé Nast recommend a five-point checklist when studying consumers within this environment.

One ad, three views of emotion

Sandeep Patnaik and Scott Purvis of Gallup & Robinson look at how three testing methods assessed a Heineken TV ad.

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With the MyQuirks market research dashboard (quirks.com/MyQuirks) we created a module for viewing the recent posts of all research blogs in one place. We also wanted to give MyQuirks users additional flexibility, so we compiled a list of all the blogs with direct links to each blog as well as to the RSS feed. This way users can quickly and easily link to their favorite blogs to see previous posts as well as add them to personalized RSS feeds. If you would like your own blog added to Quirk's compilation, send the link, title and a short description to dan@quirks.com.

Quirk's wants your multimedia!

Quirk's multimedia directory is alive and well with recorded Webinars, product demos, tutorials and more, but Quirk's has also introduced multimedia functionality to its company directories and events calendar. If you would like to add video to your directory listing, contact Alice Davies at alice@quirks.com. To add video to your upcoming event, contact Emily Goon at emily@quirks.com.

cover-to-cover

Facts, figures and insights from this month's issue

> Sometimes the objective, second-sight researcher can pull together the disparate threads of various interviews into an overriding theme that the primary researcher, immersed in the detail of each interview, may not have been able to step back and see. *(page 18)*

> While it is easy to jump to conclusions regarding stereotypical Hispanic gender roles (machismo and marianismo), we find that these terms are too often misunderstood. In fact, we find that understanding of these terms relies more on caricatures than on the nuanced reality of culture-based gender roles among Hispanics. *(page 24)*

> There's buzz surrounding the exponential increase of older generations getting online, but there's a huge difference between a 65-year-old and an 80-year-old. *(page 28)*

> Kids find choices empowering (think Subway), and moms and dads find that variety offers greater peace of mind. Knowing that everyone in the home will be happy with at least one of the brand's offerings is why brands like Doritos and M&M'S achieve Family Delighter status. *(page 44)*