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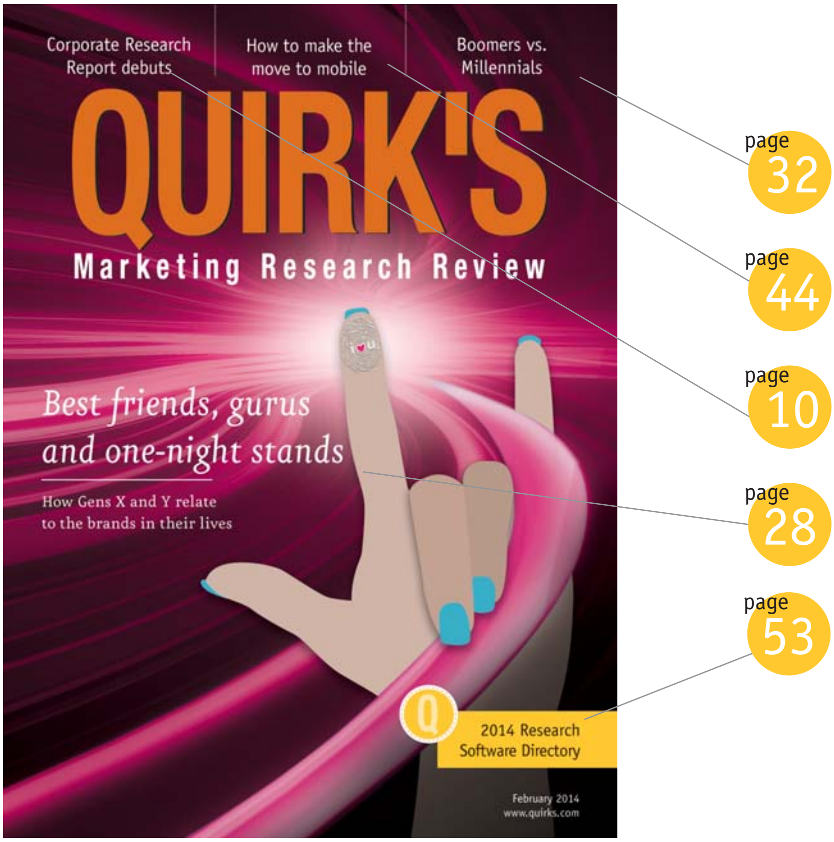
February 2014 • Vol. XXVIII No. 2



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CLICK WITH QUIRK'S ••• online, e-newsletter and blog highlights

••• research on research

Everything we know about corporate research, all in one place

Quirk's first-annual Corporate Research Report is the only industry study that is designed by and dedicated to the corporate researcher (our term for those whose job it is to gather, analyze and disseminate insights about their organizations' customers, products and services). The purpose of the report is to give corporate researchers an in-depth look into their world, helping them learn more about what their peers and colleagues are doing and also benchmark themselves and their departments.

- The report has three sections.
- The first presents data from 20 years of tracking the methodologies used by the corporate researchers who subscribe to Quirk's Marketing Research Review.
- The second is a recap of findings from our study on the views, opinions and pain points of corporate researchers in the context of the current state of the marketing research process.
- The third reports on the results of our annual survey of corporate researcher salaries.

What makes this compilation stand out from other trend studies in the research industry is that it is completely independent and noncommercial. The questions were formulated by corporate researchers, not research suppliers. There is no hidden agenda, no sale of questions or even sponsorship. In other words, the study is not about research suppliers or even Quirk's – it's about the corporate researcher!

To download a free copy of the report visit quirks.com/CorporateResearchReport.

// E-newsworthy

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It's your 'reputation,' stupid: the real 'r' in CRM
researchcareersblog.com/2013/11/13

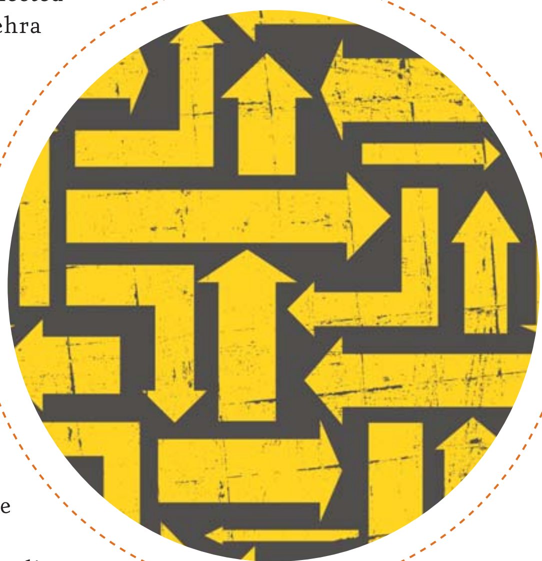
••• customer experience

4 customer experience trends for 2014

Did you know that consumers are only willing to wait an average of 76 seconds for customer service support when visiting a Web site? In the time it takes to toast a piece of bread, a customer – or potential customer – could be gone.

This figure comes from New York customer experience management company LivePerson's second-annual Connecting with Customers research study, which explores the online trends and consumer behaviors that are shaping today's digital experiences and driving consumer expectations.

On LivePerson's The Connected Customer Blog, Anurag Wadehra shares the four primary themes that emerged from the research.



1. Room for improvement

Brands today cannot afford to deliver only the basics when it comes to the online experience. Consumers are quick to look elsewhere when they feel their expectations are not being met. Forty-nine percent of consumers continue to find Web sites difficult to navigate, with 33 percent struggling to seek help or locate customer service.

2. Brand trust and loyalty

There's no substitute for the human touch. Seventy-eight percent of consumers agree that they are more likely to be loyal to a company that provides real-time, one-on-one support at critical moments during their digital journey.

3. Speed and efficiency

The window of expectation for timely assistance is growing narrower. Nearly three-quarters of consumers stated speed and efficiency were the most important factors in creating a great online experience.

4. High-impact moments

Identifying the key moments where consumers may require additional support during their digital journey is essential. The actual moment of purchase is one of these moments, as 35 percent say that they need help or support at this stage.

quirks.com/articles ID 20140201

••• social media research

Can Twitter predict virality?

There's been talk in the microblogosphere of a clandestine experiment being conducted by Twitter to predict which tweets have the potential to go viral.

The Twitter account @MagicStats is protected and the bio simply reads "I favorite the best tweets I see in real-time." According to TechCrunch writer Matthew Panzarino's November 26, 2013, article, this account is similar to and "followed by many members of Twitter's search and relevance team, just like Twitter's other experiments @MagicRecs and @eventparrot." Twitter uses @MagicRecs and @eventparrot to direct-message members with personalized recommendations for users/content and events, respectively.

Despite its magical moniker, Twitter's experiment suggests there's more science than sorcery involved in predicting virality. Although Twitter has declined to comment, Panzarino has observed that the account "appears to be working on several metrics including velocity of activity (like favs and retweets from other accounts)." In some cases, a Favorite from Magic Stats can result in 100+ retweets in a few hours.

Cracking the code to virality could create a huge advantage for Twitter advertisers and also allow now-publicly-traded Twitter to charge a premium for its targeted marketing services.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By Joseph Rydholm, Quirk's Editor

Quirk's debuts Corporate Research Report

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Joe Rydholm can be reached at joe@quirks.com

A great irony of the marketing research industry is that it's one of the most under-researched industries I know of. True, there are a host of ongoing studies of the business end of the biz, fielded by the likes of the AMA, the MRA, ESOMAR and other industry bodies, but there hasn't been a lot of work done to look at the corporate side of the equation.

That's one of the reasons we have been conducting our annual survey of marketing research salaries since 2009 (for both client-side and vendor-side researchers) and why we debuted our corporate researcher study last year.

Our aim with these various studies is to give corporate researchers a way to compare and measure themselves in relation to their peers. What are researchers struggling with? What are their pain points? How do they stack up against other insights professionals?

We publish the results of our studies in the magazine and in our e-newsletter (and house them in our searchable online article database) but we thought it might be worthwhile to compile them all into one comprehensive report. And thus was born what we have dubbed, with great creativity, the Corporate Research Report.

We'll have printed copies of the report with us at the various conferences and events we attend this year but you can also download a (free) copy at www.quirks.com/corporateresearchreport or access it through the same Apple and Android apps you use to read the e-version of the magazine.

The three-part report compiles data from our ongoing subscriber study of research methods in use and the aforementioned studies of the corporate researcher's work life and salary and compensation.

Research methods: Each year, new and existing Quirk's subscribers are asked about their roles in the research industry (i.e., job title); their involvement in different industries (i.e., consumer, non-durable; consumer, durable; services; business-to-business; and health care); and which research products and services they purchase – from full-service research, syndicated studies and personal interviewing to panels, focus group moderating and statistical analysis.

Work life: To develop the material for the work life section, our questions focused on the makeup and workings of their departments; their pain points and challenges; how they assess their own performance and how others assess theirs; their preferred ways of staying up to date on the industry and its methods; and their views on the value and staying power of newer research methods.

Salary and compensation: The 2013 edition of the annual salary survey of client-side researchers yielded the largest respondent pool yet, with a total of 1,290 full-time client-side researcher participants – and arguably the most optimistic data set so far. We debuted the salary study at the height of the Great Recession, so it's been interesting to follow how both salaries and outlooks have evolved along with the state of the national and global economy. While the research industry went through bouts of dissatisfaction in the workplace (2011, specifically) and rashes of wanting to change jobs (again, 2011), client-side researchers have largely toughed it out and now seem the better for it, as the 2013 data shows the highest level of job satisfaction to date, at 75 percent (19 percent somewhat satisfied; 37 percent satisfied; 19 percent very satisfied).

Ways to improve

If you check out the Corporate Research Report and you find there are topics you'd like us to address, please let me know. We sought the input of corporate researchers in developing the questionnaire but we are always looking for ways to improve and make more relevant the material we produce. If you're curious about something, chances are so are your research peers and colleagues, so don't hesitate to contact me at joe@quirks.com.

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ID 20140202

IN FOCUS

••• a digest of survey findings and new tools for researchers

// Survey Monitor

••• travel and leisure

Have money, will travel

Affluents traveling and spending more

The One Percent just got a little bigger – among active travelers, that is. Specifically, 6 percent of leisure travelers now have an annual household income of $250,000 or more, compared to 4 percent in 2010, and in an interesting demographic shift, women now make up the majority of these affluent travelers, up from 42 percent in 2010, according to the 2013 Portrait of American Travelers study from MMGY Global, a Kansas City, Mo., travel marketing agency, and the Harrison Group, a Waterbury, Conn., research company.

Affluent travelers are planning more trips in 2014 than travelers with more modest annual household incomes. Twenty-eight percent plan to take more trips, versus just 18 percent for the general population of all leisure travelers. They also intend to spend more on vacations in the year ahead. This group took an average of five leisure trips in 2013 and spent an average of $9,765 during that time period. They expect to spend $10,585 in 2014, which represents a spending increase of 8.4 percent on vacations.

The research also indicated a shift in the affluent traveler demographic. Affluent travelers are now more likely to be married (82 percent), compared with 77 percent in 2010. Affluent travelers are also older, with an average age of 49 in 2013, compared with 43 in 2010. Just 1 percent of this group was retired in 2010, compared with 14 percent in 2013.

More affluent travelers have no children at home in 2013 (59 percent), compared with 2010 (40 percent), and have taken fewer trips with a spouse/another adult and children (mean of 1.5 trips) than in 2010 (mean of 2.3 trips).

Seven in 10 affluent travelers took a vacation outside the continental U.S. during the past 12 months. The most popular destinations included Western Europe (52 percent), the Caribbean (41 percent), Mexico (22 percent) and Canada (18 percent).

Nine in 10 affluent travelers use the Internet to obtain information about travel services or suppliers, including availabilities and rates. The most popular travel Web sites among affluent travelers include specific airline-branded Web sites (53 percent), Expedia (46 percent), TripAdvisor (46 percent), specific hotel-branded Web sites (45 percent), Orbitz (42 percent), Travelocity (36 percent), Kayak (33 percent) and Priceline (26 percent). www.mmgyglobal.com/research

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••• millennials

American-made matters

Supporting the economy and quality drive Millennials to buy 'Made in the USA'

A shopper research survey conducted by Perception Research Services (PRS), Teaneck, N.J., indicates that


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shoppers are motivated by "Made in the USA" claims on packaging, as most say that they are more likely to purchase a product after noticing the "Made in the USA" claim on it. This claim has resonated with Baby Boomers in the past and is influencing Millenials more than ever.

According to Boston Consulting Group's (BCG) Center for Consumer and Customer Insight, U.S. Millennials are receptive to cause marketing and are more likely than non-Millennials to purchase items associated with a particular cause (37 percent vs. 30 percent). Consistent with 2012, the 2013 PRS study showed that the primary reason shoppers claim they are more likely to purchase "Made in the USA" products is to help the economy. Another reason is because American-made products are perceived to be higher quality and worth paying more for. According to BCG, "When considering similar products made in the U.S. vs. China, the average American is willing to pay up to 60 percent more for U.S.-made products."

However, this may vary greatly based on the specific product category. Recent sales data suggest that many apparel shoppers are willing to forgo some level of product quality in order to pay less. According Port Washington, N.Y., research company The NPD Group, many t-shirts that are bought today are lighter than they used to be since manufacturers had to take things out to keep the price the same.

But Walmart, for one, is pushing to have it both ways – maintain low costs while still providing American-made goods. Walmart asserts it is giving its suppliers added incentives that would increase sourcing of American-made products by $50 billion over the next 10 years and create more than 1,600 American jobs.

A wide range of companies such as Apple, General Electric and Brooks Brothers are also experimenting with making more products in the U.S. However, the shift to more American-made products may not be entirely patriotic. For many, manufacturing abroad no longer makes sense. Either it is becoming too costly or they feel they are lacking a competitive edge. In some cases they want to meet consumers' desire for American-made goods or they simply want to get merchandise from the design phase into stores within weeks rather than months to be of-the-moment.

Importantly, for the shoppers in the PRS study, the majority of products they say they would prefer to purchase if American-made are food, medicine and personal care items, suggesting that quality and safety may be the true motivating factors. This may be in part because for these lower-priced items, the cost-savings may not be substantial enough to sacrifice quality.
www.prsresearch.com

••• consumer research

In corporate America we distrust

Americans find 18 of 19 industries less honest and trustworthy

For the past decade, Rochester, N.Y., research company Harris Interactive's The Harris Poll has measured the percentage of Americans who perceive 19 large industries as generally honest and trustworthy. In 2013, this perception dropped for 18 of the 19 industries, as U.S. adults overall seem to have lost trust in most of corporate America. The only industry that did not drop is tobacco companies, as just 3 percent of Americans say they normally would believe a statement from someone in that industry – same as it's been for the past few years.

At the other end of the spectrum, the most trusted industries are supermarkets, where 30 percent say this industry is generally honest and trustworthy, and hospitals, with 28 percent. However, trust in supermarkets and hospitals is down 8 percentage points each from 2012.

When asked which industries are generally honest and trustworthy so that you normally believe a statement by a company in that industry, 42 percent replied "none of these" – an increase from 2012, when 36 percent indicated the same. After tobacco companies, the industries that are least-trusted are oil companies (4 percent), social media (6 percent), managed care (6 percent), telecom (7 percent) and health insurance (7 percent). Just one in 10 say they think packaged food companies (11 percent), airlines (11 percent), car manufacturers (11 percent), pharma and drug companies (10 percent) and life insurance companies (10 percent) are generally honest and trustworthy.

The industries trusted by the highest percentages of Americans after supermarkets and hospitals are online search engines (18 percent), banks (18 percent), computer hardware companies (17 percent), online retailers (15 percent), electric and gas utilities (14 percent) and computer software companies (13 percent).

The biggest changes since 2012 on this question are the eight-point drops for supermarkets and hospitals, a seven-point drop for computer software companies and a six-point drop for electric and gas utilities. Over the past decade, the biggest drops are 17 points for banks and 12 points for packaged food companies.

This series also asks which of the 19 industries should be more regulated by government, and three in 10 Americans select "none of these." The industries that the largest percentages of U.S. adults would like to see more regulated are oil (41 percent), pharmaceuticals (39

percent), tobacco (35 percent), health insurance (34 percent), banks (31 percent), electric and gas utilities (24 percent), packaged food companies (24 percent) and managed care companies such as HMOs (24 percent). Few U.S. adults (less than 10 percent) want to see more regulation of computer hardware and software companies (6 percent each), online search engines (7 percent), online retailers (7 percent) or supermarkets (9 percent).
www.harrisinteractive.com

••• mobile research

Big Brother abroad

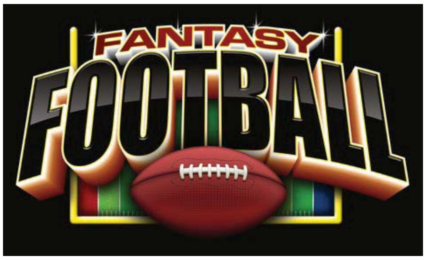
Conservative Americans most concerned about mobile data privacy

With the news that the National Security Agency tracks the locations of nearly five billion cell phones every day overseas, including those belonging to Americans abroad, now more than ever, Americans are worried about the privacy of their text messages and mobile phone calls. And that level of concern varies according to gender, age and whether respondents considered themselves liberal or conservative, according to a survey from CoverMe, a San Jose, Calif., messaging app, and SodaHead, an Encino, Calif., online research community.

Americans are very concerned about the privacy of their mobile communications, as 65 percent of respondents are not confident that their mobile phone comes with adequate security and privacy technology. One-third of respondents believe that the government is reading their text messages.

Only 7 percent of respondents that consider themselves to be liberal feel the government is reading their text messages, while 41 percent of conservatives think the government is taking a look. Sixteen percent of those ages 25-to-35 are worried that government is reading their texts, as are 37 percent of those ages 35-to-44. However, almost two-thirds of respondents said that they would not be willing to try a messaging service with military-grade encryption, which might indicate that their concerns are not severe enough to warrant taking action.

Mobile communications "snooping" is rampant, especially among women, teens and Millenials. Fifty-seven percent of respondents have caught someone reading their text messages or looking at their photos. When broken down by gender, the survey data reveals that for females, the number skyrockets to 78 percent who have caught someone. Eighty-one percent of both 13-to-17-year-olds and 18-to-24-year-olds have also caught people reading their texts and viewing their photos.
www.sodahead.com



••• sports and entertainment

Living the dream

A look at fantasy sports in the digital age

With the Super Bowl just behind us, the fantasy football season has wrapped up and fantasy baseball is right around the corner. As consumers – especially sports fans – become tech-savvier and more mobile-friendly, staying engaged with the fantasy sports experience is becoming easier and easier. New York researcher The Nielsen Company conducted a study to take a closer look at how fantasy sports are scoring with users.

Fantasy sports have become big business since sprouting from a Rotisserie, or owner simulation, game decades ago. The growth of this niche industry has also picked up momentum as technological advances in interfaces, devices and statistical data aggregation have allowed players a way to easily check scores, adjust rosters and trash-talk from anywhere and on any device – that's light years from having to hand-tabulate player stats in the years before the digital age.

During the second quarter of 2013, fantasy sports players were most likely to be male and aged 25-to-34 (49 percent and 72 percent more likely than the average U.S. Internet user, respectively). Compared with the average adult online, fantasy sports players were also 21 percent more likely to be Asian-American, 12 percent more likely to have children and 7 percent more likely to make between $50,000 and $75,000. Sixty-eight percent of adult fantasy sports players online are male and are 49 percent more likely to be male than the average U.S. adult online.

So which sports sites and apps do fans draft when they're looking to build their fantasy teams? Power rankings by Nielsen show that familiar names like ESPN and Yahoo! Sports are top picks among fantasy sports players. During second-quarter 2013, 1.3 million adult fantasy sports players visited Yahoo! Sports Web sites and adult fantasy sports players online were 43 percent more likely to visit Yahoo! Sports Web sites than the average U.S. adult Internet user.

Fantasy sports players are also taking their teams with them on the road, as more than 10 million Americans accessed fantasy football apps on their smartphones, up 15 percent from 2012. Looking at the top fantasy football apps, Yahoo! and ESPN each had five million unique users, respectively, during September 2013. Overall, fantasy football app users spent two hours and 14 minutes per person, on average, using these smartphone apps during September 2013 and they opened them 27 times per month on average.
www.nielsen.com

Q

IN FOCUS

Product and Service Update

••• tracking/mobile research

Tracking and fencing

Toluna debuts TolunaTracking; updates Diary

Wilton, Conn., research company Toluna has launched TolunaTracking, a research solution that combines TolunaAnalytics, the company's data reporting, analysis and visualization tool, with SmartSuite, the company's statistical matching methodologies that aim to enhance sample representativeness and ensure that brands do not mistake changes in sample composition for adjustments in the metrics they are tracking.

TolunaTracking clients can access data in real time and react to changes by delving into specific time slices, run custom data tables or conduct ad hoc analysis.

Additionally, Toluna has added geofencing to its TolunaMobile Diary. The TolunaMobile Diary app allows clients to present questions and responses to users in-store, including the ability to present and upload video and images and read UPC barcodes. The app can send automatic and customized reminders to prompt respondents to enter information based on location and event. In addition, the app can now push surveys to respondents as they enter a specific location. www.toluna-group.com

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••• project management

Get organized

Research Hub offers enterprise-wide view and management of projects

Fresno, Calif., research company Decipher Inc. has debuted Research Hub, a centralized research and data management portal designed to serve as the backbone of Beacon, Decipher's research and reporting software platform. The Hub's collaborative project management environment aims to increase data visibility and accessibility to give users a comprehensive understanding of the total health of their organization's research practice – regardless of the data source.

The Research Hub includes access to detailed project views with search and sorting capabilities; sharing of project details and data; a central location for storage of study-related documents; uploading of data from other survey and marketing platforms; the ability to analyze data across multiple surveys; and a refined and expanded online knowledge base, with added walk-though functionality, enabling a contextual overlay tutorial. www.decipherinc.com

••• eye tracking

Anywhere and everywhere

Cloud-based beta to take eye-tracking studies global

Stockholm, Sweden, research company Tobii Technology has launched a beta program for Tobii Track, a Web-based research solution that will run on Tobii Cloud to assist in conducting eye-tracking research in any environment and sharing data collaboratively.

Tobii Track is designed to allow researchers with any image, video or Web site to design and conduct large-scale, widely-distributed eye-tracking projects. All data is automatically uploaded to Tobii Cloud and directly merged and ready for analysis. www.tobii.com

••• reporting software

Skip past PowerPoint

Dapresy Pro 8.4 updates dashboard and reporting features

Norrköping, Sweden, research software company Dapresy has released Dapresy Pro 8.4, its research reporting solution. The latest version aims to allow users to create dashboards that, through Dapresy's filtering, generate thousands of views without PowerPoint decks or Excel tables.

Version 8.4 also has several new modules to improve performance on large data sets; a global brand feature designed to eliminate the need to create individual reports by country or region; customized dashboard views; and the ability to export slides to PowerPoint and the underlying data tables to Excel. www.dapresy.com

••• online research

Help #EndFakeReviews

Third-party management of online reviews aims to up credibility

Austin, Texas, research company Bazaarvoice Inc. has released the Bazaarvoice Authentic Reviews Trust Mark, a service designed to identify consumer reviews that comply with Bazaarvoice's Authenticity Policy to help ensure they are genuine, unbiased and transparent.

The inclusion of the "b:" logo is intended to indicate that reviews are managed by a third party, as opposed to the brand or retailer. A mouse-over text box informs the user that the reviews displayed on the page "comply with the Bazaarvoice Authenticity Policy, which is supported by anti-fraud technology and human analysis."

Together, the Authenticity Policy and the processes that support it are designed to prevent fraudulent content, such as commercial messages, automated submissions, degrading content from a competitor or self-promotion, as well as inauthentic behavior such as editing and cherry-picking reviews or posting reviews without proper disclosures when required.
www.bazaarvoice.com/trustmark

••• data analysis

More than directions

Mapping platform update boosts analytic capabilities

Map publisher SpatialTEQ Inc., Newburyport, Mass., has released Map Business Online (MBO) 4.1, a software platform that offers business maps for finance, health care, sales and marketing professionals in the U.S. and U.K. Version 4.1 includes drive-time analysis and on-map data editing. Maps include administrative district layers (county and postal layers) and Census demographic data.

With MBO 4.1, users can edit existing MBO business data layers and import business data, create map views and later amend imported data layers.

Drive-time estimates are based on the most direct vehicle routes across a road network considering speed limits, turn restrictions and one-way/two-way road statuses. MBO 4.1 also allows users to conduct concentric ring market analysis around location points. This feature creates circular areas of varying radii around a point. Both drive times and concentric ring analysis are used to estimate customer proximity to new store locations or to define multiple store operating areas.
www.mapbusinessonline.com

••• television research

Giving credit where credit is due

Comcast and Nielsen partner to improve on-demand commercial ratings

Comcast, Philadelphia, has partnered with New York researcher The Nielsen Company to implement an advertising product for time-shifted TV viewing. On Demand Commercial Ratings (ODCR) combines Comcast technology and Nielsen's C3 ratings model, which measures on-demand commercial viewing within three days of a show's live airing for the most-recent episode. ODCR aims to insert the full C3 ad load into every prior episode of a series' on-demand programming for three days after the live airing.
http://corporate.comcast.com

••• Briefly

■ Port Washington, N.Y., research company The NPD Group has launched ReceiptPal, a free mobile app for iPhones designed to reward participants for uploading photos of receipts. For every receipt uploaded, users earn points toward redeemable rewards and are entered into a drawing for a weekly cash prize.
www.receiptpalapp.com

■ Shelton, Conn., research company SSI's QuickThoughts mobile data collection platform has expanded to Austria, Belgium, Canada, Norway, Spain, Sweden and Switzerland. QuickThoughts is now available in 14 countries total. The app is also available for from the Apple App Store, Google Play Store and Kindle Fire Store.
www.surveysampling.com

■ The Federal Trade Commission (FTC), Washington, D.C., will host a series of two-hour seminars to examine the privacy implications of three new areas of technology: mobile device tracking, alternative scoring products and consumer-generated and controlled health data. The first seminar will be held at 10 a.m. on February 19th at the FTC Conference Center in Washington, D.C. Seminars are open to the public.
www.ftc.gov

■ Perspective Group, an Orlando, Fla., PR and multimedia company for the timeshare and vacation ownership industry, has added CustomerCount online surveys to its Intuition brand marketing service. CustomerCount is a survey system designed to offer real-time analytics from an enterprise-level social media monitoring platform.
www.intuitionbyperspective.com

■ Encino, Calif., research company uSamp has developed mobile technology designed to allow researchers to collect photo and video responses from survey participants using a mobile Web browser.
www.usamp.com

■ New York research company Ebony Marketing Systems has debuted a double-opt-in smartphone user database designed to cover hard-to-reach demographic segments.
www.ebonysystems.com

■ Ashburn, Va., research company Offerwise has launched two panels in Latin America. The QueOpinas.com panel is intended for Spanish-speaking Latin America and the VoceOpina.com.br panel is a Portuguese-language panel in Brazil. Offerwise has used TV advertising to recruit panelists.
www.offerwise.com

■ Wilmette, Ill., research company Insights in Marketing LLC has released an e-book, titled *Getting Women to Buy: Better Insights to Transform Your Marketing*. It is available for download at www.insightsinmarketing.com/resources/ebooks/2013/12/getting-women-to-buy.aspx.

SURVEY DESIGN | SURVEY PROGRAMMING | DATA CLEAN

Mobile, yes; ethnography, not so much

| By Lili Rodriguez

snapshot

Mobile ethnography certainly has its place in the researcher's toolbox, the author says, but it's no substitute for data-gathering by a trained observer.

quirks.com/articles ID 20140205

There's been a lot of hype lately about using mobile ethnography. So-called mobile ethnography uses technology (i.e., smartphones) to allow respondents to self-report "in the moment," sending video, pictures and text while they are going about their daily lives.

Ethnographic research is a methodology developed by anthropologists based on the premise that a trained researcher, using observational research methods, will see things that are important in explaining or describing respondent behavior, actions of which the respondent is unaware. Respondents can show you what they notice and what they think they're doing but they can't show you what they're not noticing or what they're not doing. Only a trained observer will see those things and be able to capture and make sense of that data. And what people don't notice or don't do – or what they do so unconsciously that they're not aware they're doing it – can sometimes be the most important data in an ethnographic study.

Mobile self-reporting is an exciting methodology that does have the ability to capture respondent thoughts and feelings in the moment and it can be an excellent way to obtain specific kinds of data. It's especially valuable for capturing respondent thoughts, feelings and reported behaviors in environments to which we, as researchers, don't usually have access (e.g., the respondent's workspace; private spaces like bathrooms and showers; family functions like weddings, birthday parties and funerals; private moments like just before bed or when they wake up in the middle of the night, etc.).

Nothing like ethnography

It's also a great way to supplement other methodologies like focus groups and ethnographic research. But it's not ethnography. In fact, it's nothing like ethnography. And it's not a substitute for ethnographic research.

A trained observer can see habitual or unconscious behaviors that have important implications for product development, product improvement and marketing. Those unconscious behaviors will never be seen or identified using only self-reported data from respondents. As an example, in a study we conducted to help a food manufacturer optimize (and potentially reduce the costs of) packaging, we observed respondents repeatedly (but not consciously) vigorously shake a package of product before finally opening and using it. In fact the behavior was so habitual and unconscious that they even vigorously shook the product before putting it back in the refrigerator. Our client's packaging folks had no idea that their package had to withstand that amount of ritual abuse and it saved them from making a potentially very costly mistake. The research showed that while making the package less durable would save money, doing so would have disastrous consequences in-market.

A trained observer will see behaviors that respondents will rarely choose to report on or show. For example, respondents won't document the myriad casual social interactions that occur throughout a day and have no particular conscious importance to the respondent but that reveal how they handle

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peer interactions, how peer groups influence decision-making, how the decisions about what to do and when or where to do it get made.

Ethnographers see behaviors (and incidents and environments) which respondents will be inevitably reluctant to show or report because they're embarrassed – a dirty or messy home, a silly mistake they make using a product, a misbehaving child, an "oops" moment they'd rather not remember. And it's difficult for respondents to report on the smells and sounds that surround them and that vary from environment to environment, which might be relevant to a particular marketing challenge or opportunity.

The things they don't see

And, perhaps most importantly, respondents can't report on the things they simply don't see, don't notice or think they don't care about – some of which might be your products. As part of an ethnographic study we did for a snack-food company, we went grocery shopping with a relatively large number of moms (large by qualitative research standards, anyway) during a time period when the client had a very large freestanding display positioned prominently in supermarkets but outside of and away from the snack-food aisle. Our respondents were specifically asked to shop for the things they pack in their children's lunchboxes for snacks as a part of their regular weekly shopping trip.

Astoundingly, none of the respondents we shopped with noticed the large (and very expensive) freestanding display. We were able to document how automatic and habitual their shopping trips were and how difficult it is to interrupt that behavior and sell products in parts of the store they don't normally shop when looking for products in that category. That data would never have been revealed if we'd relied on self-reporting (regardless of the technology employed). And because we were with our respondents and observing the behavior, we were able to bring them back into the store at the conclusion of the shopping trip to point out the display and probe the behaviors that caused them to ignore it.

Exciting and useful

Mobile qualitative research using smartphone technology is a very exciting and useful new methodology. It's a technology we have used at our firm because we believe it allows us to address some learning objectives that would have been very difficult to address otherwise. But it's not ethnography and it cannot (and should not) be used in place of ethnographic research.

Mobile qual is a tool – and a great one to add to our qualitative research toolboxes – but it is not the solution to all research problems and cannot replace true observational research methods. Let's call it what it is rather than sell it as something it's not.

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A choice in the matter

| By Matthijs Visser

snapshot

What happens when you let respondents choose their feedback method?

Twenty-five years ago, every survey respondent's primary real-time communication method was a landline phone. These days, respondents' preferred communication methods vary enormously due to the plethora of devices and applications available to them. To list a few statistics: 91 percent of U.S. adults own a cell phone[1]; 55 percent of those own a smartphone[2]; 82 percent of U.S. adults use e-mail[3]; 81 percent of adult U.S. cell phone owners use text messaging[4]; 64 percent of U.S. households have a landline phone[5].

With such a multitude of communication methods available, respondents have developed communication preferences that are unique to each individual. Even though a survey respondent may have access to e-mail, mobile and landline voice and text messaging, it doesn't mean that they prefer to use each method equally. What if our research efforts could respect those preferences as opposed to dictating a single data collection methodology?

We hypothesize that providing respondents with different options for providing feedback results in the following benefits: an improved survey experience; an increase in the survey response rate compared to using a single survey methodology; sample that is more representative of the population.

But is that in fact the case? To gauge the effectiveness of providing respondents with multiple options to complete the survey, Advanis, in partnership with our client, conducted a pilot on a large customer-experience study. Three methodologies were tested: IVR-only, SMS-only and letting respondents choose between SMS, Web and IVR, as demonstrated in Figure 1.

So, do respondents actually make use of each of the different feedback options, when offered? When we allowed survey respondents to choose their preferred feedback method, we see that all of the options provided to customers are being leveraged (Figure 2). No single methodology dominates, which demonstrates that respondents clearly appreciate the different options being provided to them.

Did we see higher response rates when offering multiple options? Letting respondents choose resulted in substantially higher response rates[6] compared to the IVR-only (+32

Figure 1

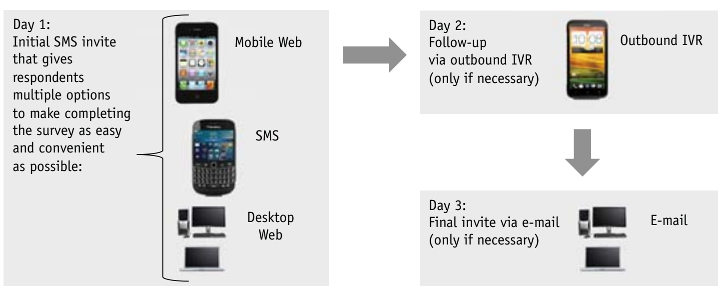

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Figure 2

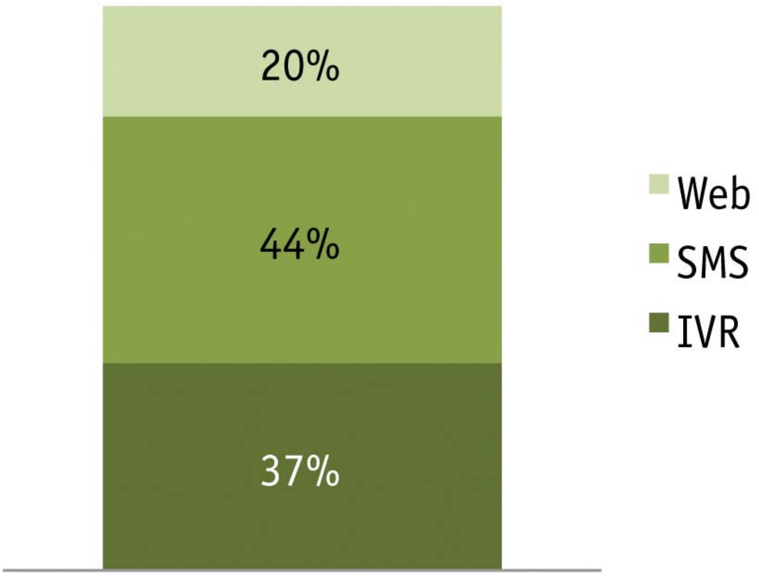

Figure 3

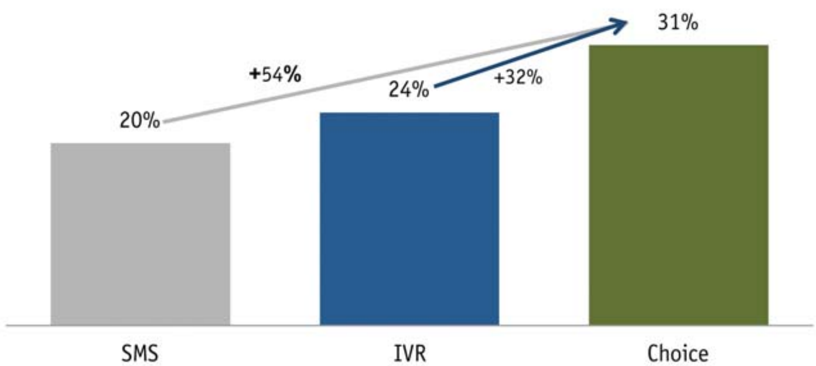

Figure 4

	IVR	SMS	Choice	Population
% Own Smartphone	55%	61%	57%	
Age: Less than 35	37%	47%	44%	
Age: 35 to 64	53%	51%	51%	
Age: 65 or older	10%	2%	6%	
Transaction type 1	67%	70%	64%	61%
Transaction type 2	26%	20%	27%	30%
Transaction type 3	8%	10%	9%	9%

percent) and SMS-only (+54 percent) methodologies (Figure 3).

Are respondents representative of the overall population? Although population characteristics weren't available for respondent characteristics, we were able to compare certain respondent characteristics across the three methodologies tested (Figure 4). Also, for transaction type, a proxy of the population distribution was available, allowing us to compare that distribution to the three methodologies.

When respondents were able to select their preferred methodology, phone type and age characteristics reflect a balance between the IVR-only and SMS-only characteristics. This is perhaps not surprising, since this methodology offers respondents both options (as well as to complete the survey online).

The transaction type distribution for respondents who were able to choose their feedback method most closely reflects the population distribution.

Result is positive

Our case study clearly demonstrates that when providing survey respondents with the ability to choose their feedback method, the result is positive. There is a substantial increase in response rates, while ensuring that sample remains representative. On top of that (and arguably even more importantly), the survey experience is made much more convenient and enjoyable for respondents.

The application of this approach extends beyond the methodologies used as part of the case study. Any combination of feedback options (CATI, IVR, e-mail-to-Web, SMS, etc.) can be presented to respondents based on the available contact information and the unique requirements of each individual study. For example, when applying this multimodal approach in partnership with another client, we attained a response rate[7] of over 50 percent by using a combination of CATI and e-mail-to-Web.

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[7] Again, calculated as completed surveys divided by all records contacted.

••• millennials

Best friends, gurus and one-night stands

How Gens X and Y relate to the brands in their lives

| By Jo-Ann Osipow and Kathy Sheehan

snapshot

The authors draw from ongoing research to show marketers targeting Millennials what they can learn by comparing and contrasting them to their Gen X predecessors.

quirks.com/articles • ID 20140207

Just like siblings who define themselves through comparison to the models set by their elders, generations do not emerge in a vacuum or a solitary petri dish. Looking sideways, often with a mix of horror and grudging admiration, the emerging generation says to itself, "I'm not going there!"

It has been said that today's younger generations have not rebelled against their parents' tastes and values like the Boomers did in the heady 1960s and '70s but this does not mean that Generations X and Y are followers by nature. Generation Y (covering roughly ages 20 to 33) in particular – often referred to as Millennials – possesses a mixture of confidence, savvy and latent narcissism that seems almost out of left field, like a sculptor born into a family of accountants.

And there is perhaps no better way to know and appreciate the stark difference of Gen Y than through comparisons to their timeline neighbors, Gen X (roughly ages 34 to 48). Where Boomers are idealists at heart, Gen X are street-smart, skeptical and pragmatic and Gen Y "I can" optimists. Again and again, we see these generational archetypes resurface – in Gen Y's view of their futures, the economy and what constitutes "the good life."

These patterns of thinking and acting can also give marketers a clear sense of how to create and nurture brands that Gen Y will embrace as trusted "best friends" – not just "acquaintances," "one-night stands" or "complete strangers." After all, earning the Gen Y's love can be the key to billions – some say trillions – of dollars in buying power.

Clues to their tastes

Information from GfK's Roper Reports research sketches a portrait of the values that define Gens X and Y and, at the same time, offers clues to their tastes in brands. Gen Y ranks "enjoying life" and "having fun" significantly higher among its core values than the general population, while scoring "close friends" and "tradition" lower than the U.S. average. Even when today's Gen Xers were 12 years younger, they did not

even prestige (see Table 1). A bit of buzz around a brand is hugely attractive to Gen Y; hearing about it from friends, social media connections and even media personalities makes a brand seem like something Millennials "need to have."

Of course, customization is also big deal for Gen Y; they grew up at a time when it could actually be expected in many circumstances – and customizing makes any product "all about me." (You might say that every Gen Yer is his or her own favorite brand.)

But Millennials' tastes and purchasing power have been tempered by tough times. The exuberance of the 1990s – Gen Y's formative years – was shattered by 9/11, the tech and real estate meltdowns and the financial collapse. The percentages of Gen Yers who have taken on major life events – marriage, having kids and homeownership – are vastly lower than those for Gen X or the total population. To some degree, their lives as consumers are on hold but their purchasing power and influence continue to grow and will likely accelerate in the near future.

So how can brands earn the precious dollars of this fickle, super-savvy, tech-infused generation? The task is even harder than it sounds, because Gen Y is highly attuned to cynical ploys and overt marketing. Though they are more focused on style and design than Gen X, Millennials also prize authenticity; after all, if their purchases are stand-ins for themselves, then those brands should not be phony.

prize fun and life enjoyment the way Gen Yers do.

Not surprisingly, Gen Y's idea of the good life is highly focused on experiences rather than possessions. While "a home you own" remains the top goal for Gen Y (as it did for Gen X at a similar age), "a job that pays more than average" ranks only No. 6 for today's Gen Y (compared to No. 3 for young Gen X), and "a lot of money" barely made the top 10 (versus No. 4 for young Gen X).

Gen Y is also much more likely to exude confidence – so much confidence that they are OK with putting fun before work. That would never fly with pragmatic, "no-drama" Gen X, which is big into planning and considers hard work just part of being human.

Gen Y wants to "do it all" but never loses sight of "what's in it for me?" Over half (53 percent) think multitasking is unavoidable – much higher than the national average (38 percent); and less than one-quarter of Gen Y/Millennials say they "dislike" the multitasking experience. But to them, doing two things at once is a part of every aspect of life – not just something you do to get ahead and be productive. In fact, their No. 1 indulgence is "taking time for yourself" – more than buying clothes (No. 6), going to a concert (No. 2) or sleeping late (No. 5).

Vastly different expectations

Not surprisingly, Millennials and Gen X have vastly different expectations of products and brands. The desire for self-expression is strong in Gen Y – so products are, to them, tokens of identity and

Model of relationships

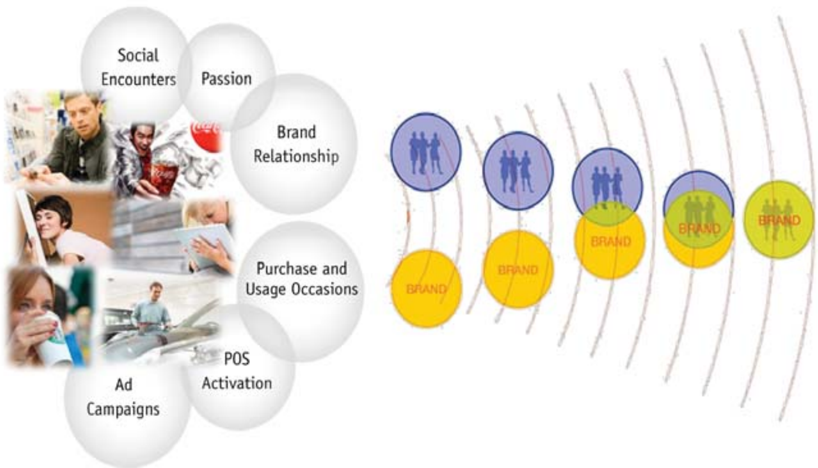
One way that we approach the task of analyzing consumers and their brands is through the model of relationships (Figure 1). As humans, everything we understand inevitably has a human quality to it; that is the lens through which we

Table 1: Gen Y and the Meaning of Brands

	Gen Y	Diff. from Total Adults
Like to buy prestige brands	34%	+12 pts
Agree brands they buy say a lot about who they are	32%	+5
Prefer lots of choices of product features and options, even if it sometimes makes decisions difficult to make	82%	+6
Willing to spend the extra money and time it takes to design and buy customized products	52%	+13
Want to be able to customize their vehicle	42%	+19

Source: GfK, Roper Reports US

Figure 1: Consumers' Emotional and Social Connections Drive Brand Success



see the world. It stands to reason, then, that how we spend our money is driven in part by the ways we respond to brands in almost-human relationships. Based on their actions, statements and ideals (or lack thereof), brands tell us "who" they are – and we use this information to categorize them. It is essentially the same shorthand we apply to celebrities, coworkers, family members – even pets.

GfK recently conducted an in-depth study of how today's consumers relate to brands, using a menu of 27 relationship archetypes and an analytical approach refined over many similar studies. The types range from Complete Strangers to Dealer-Addict to A Secret Affair, with each telling us a great deal about both the brand and the consumer. We interviewed over 17,000 people, covering 48 product categories in nine sectors; and our results for both Gens X and Y provide useful guidance for brands seeking to win over the "Me"-est Generation.

One striking thing we learned is that Gen Y have much more complex and activated relationships with brands than Gen X or the general population. They overindexed for an incredible 24 out of 27 categories of relationship and scored 120+ for fully half (14). In stark contrast, practical and skeptical Gen X never scored above 107 or below 94; and Boomers – perhaps displaying traces of their '60s-era distrust of corporations – underindexed in 22 of 27 categories.

One of the most desirable relationships for any brand, with Gen X or Y, is Best Friends. Here, trust is natural and deeply earned, having been proven over a long series of interactions. Gen Y indexed extraordinarily high for Best Friend relationships (139), while Gen X was slightly below average (95). One brand that has achieved this status with Gen Y (and Gen X) is Nissan, which Gen Y considers a familiar stand-by. "I just feel like it's been around as long as I can remember," one of our respondents said of Nissan. But Boomers, who may remember a day when Nissans were not sold in the U.S., consider it more of an Acquaintance – and even a Fling.

Gen Y is also highly predisposed to Guru/Disciple brand relationships. Although voluntary and harmonious, these connections put the brand in a position of authority – as a tastemaker, teacher or focus of aspiration. In some ways, it is a more powerful relationship than even Best Friend; but the potential for disillusionment (as with a flesh-and-blood guru) is always in the background. For Gen Y, a Guru brand would be Old Spice – its tongue-in-cheek "the man your man could smell like" ad campaign created a huge social media presence that made a 75-year-old brand relevant to today's buzz-hungry Gen Y. For Gen X, Monster energy drink is a Guru; our respondents cited Monster's "high quality," appealing taste and youthful look as reasons for loving it.

Why do brand relationships matter? Because they can lead directly to sales growth or decline. We have found that brands considered Best Friends by 20 percent of category users have an average of five times the share-of-wallet of brands with less than 10 percent Best Friends. And high-ranking Best Friend brands have three times more positive word of mouth and 2.5 times the recommendations, compared to those with low Best Friend rankings.

Brands that are seen as Gurus by at least 3 percent of category users achieve almost twice the share-of-wallet of other brands. They also receive 70 percent more recommendations from customers and have three times as many consumers calling them "favorite brands."

Intense brand connections

It is essential to understand and manage your brand's relationship with Gen Y because, as we said earlier, they are more likely to have intense, potentially volatile brand connections. In our study, only four brands rose to the status of Guru with 6 percent or more of Gen X – as compared to a remarkable 30 brands for Gen Y. Interestingly, both Gen X and Gen Y were inclined to label brands as Villains, with 21 brands earning that unhappy title from 6 percent or more of Gen X, and 29 brands for Gen Y.(This may reflect the often-skeptical attitude Gen X consumers have toward brands and advertising.)

In addition, Gen Y is much more likely than Gen X or Boomers to share their feelings (good or bad) about your brand with others – in social media and offline. For example, 60 percent more Gen Y consumers share their positive opinions about "Best Friend" brands and negative opinions of "Enemy" brands, compared to older consumers.

An important influence on Gen Y brand preferences is their Boomer parents, whom they consider friends as well as mentors. Our study shows a strong alignment between Boomers and Gen Y on brand relationships, in categories ranging from credit cards to big-box retailers to toothpaste. Brands can develop new ways to influence Gen Y by marketing to their Boomer parents – and the other way around – and by using the Gen Y-Boomer relationship as an emotionally compelling context in which to embed the brand.

Understand the categories

To be sure your brand is making the most of its relationship with Millennials, it is essential to first understand the categories (there may be more than one) into which your brand primarily falls. Then assess if this is the best status for your brand's goals and anticipated evolution; even a relationship like Star/Fan, for example, may need to be reengineered if you are hoping to stick with Gen Y as they have kids and grow into new life stages.

Being talked about is essential for Gen Y saliency; while Gen Y may like to discover your brand for themselves, it is more likely that they will gravitate to you if they sense others are doing the same. But as you try to generate buzz, do not forget the authenticity factor; transparently phony marketing could turn you into a Villain instead of a Best Friend with Gen Y – and they will be quick to let their distaste be known to friends and strangers alike.

Finally, be sure to leverage the Boomer/Gen Y synchronicity, as a way of appealing to and winning over both groups. By respecting the power of brand relationships and the intensity of those connections for Gen Y more than others, you can go beyond today's sales to create a bond that will result in strong growth and word of mouth for years to come.

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••• millennials

Are they really that different?

Strategies for reaching Millennial and Boomer shoppers

| By Lesley Brooks

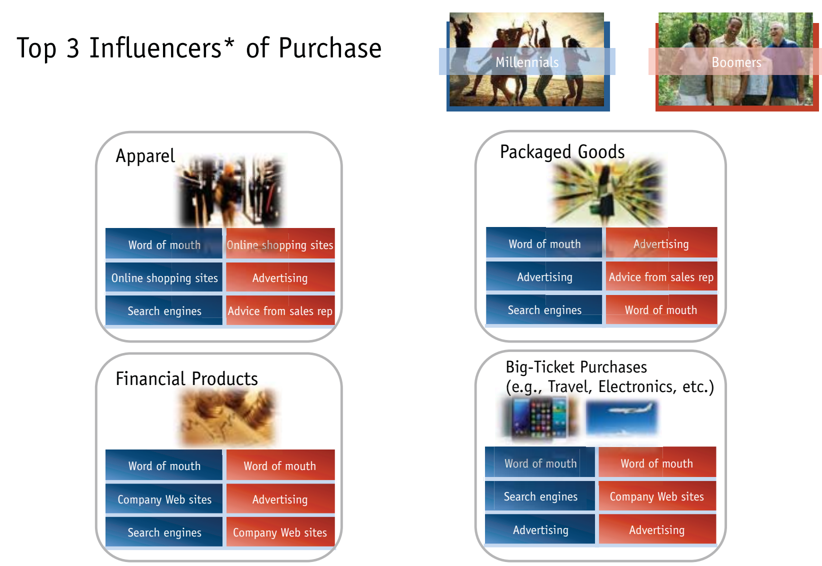
snapshot

The author explores why marketers targeting Millennials and Boomers need to consider factors beyond just the usual broad, age-based categorizations.

Much has been made of the generation gap between Millennials (18-32-year-olds) and Boomers (49-67-year-olds). Conventional wisdom and countless lifestyle surveys verify that the two groups indeed have differences in attitudes and outlooks on life. This has fueled a movement of marketers looking closely at how to harness the buying power of each group and to adjust plans accordingly.

But before launching segmented strategies, perhaps marketers should take a closer look at these consumer sets – specifically how they shop – to see how wide the generation gap actually is. Are spending behaviors different enough between Millennials and Boomers to represent an opportunity to increase profits via a segmented approach? Are differences today likely to be there tomorrow? Are the purchase requirements and influencers distinct enough in every category to merit separate marketing messag-

Figure 1 Word of mouth is the key source of information influencing purchase among Millennials. Boomers tend to rely on advertising and advice from sales reps.



*Top 2 box score – extremely/slightly influential.

ing and media plans?

A recent study of Millennial and Boomer buying behaviors including channel usage and key influencers conducted by our firm explored how Millennials and Boomers compare when it comes to spending on goods and services across a number of categories. The study set out to provide a deeper assessment of buying behaviors, requirements and priorities. The online study surveyed a nationally representative sample of U.S. consumers – all members of the Millennial or Baby Boomer generations.

Findings indicate there are indeed notable differences between Millennial and Boomer shoppers as they navigate purchases – in general and across key product and service categories. But there are also important similarities that should also be considered as marketers plan.

Relatively optimistic

When it comes to the U.S. economy, a majority of both Boomers and Millennials are relatively optimistic about the outlook. But Millennial shoppers are more optimistic, with 71 percent indicating confidence in the future state of the country's financial affairs. Boomers are less likely to be optimistic about the nation's financial outlook. It's also interesting to note that while Boomer men are optimistic (66 percent), fewer Boomer women (53 percent) are confident that economic conditions will improve.

When asked about spending patterns (compared to usual) during the recession, both groups were generally conservative. As further evidence of their optimistic edge, Millennials were more apt to maintain or increase their spending (55 percent) during tough economic times. Boomers, on the other hand, tended to pull back on spending, with 60 percent making cuts. Twice as many Millennials boosted spending compared to Boomers.

Millennials and Boomers have a similar set of concerns that drive purchases. Both groups tend to focus primarily on quality, price and value, depending on the category. Millennials as a group are relatively more price-conscious than Boomers.

Taking a look at anticipated spending habits, when Millennials and Boomers were asked to identify the categories in which they are likely to increase spending in the year ahead, the category sets are essentially the same: apparel, packaged foods, travel and financial products/insurance.

Where the two groups differ is in their priorities. Millennials place travel and apparel as their top two priorities for increased spending in 2014. Boomers are more focused on "necessities," ranking packaged foods and insurance products higher. Interestingly, while both groups spent more on electronics (including smartphones, tablets and home entertainment systems) in the past year, neither anticipates increasing spending in this category during 2014.

Millennials and Boomers also share the same habits when it comes to where they shop. Retail is by-and-large the prominent channel for buying most everyday packaged goods, apparel and electronics. Online is the preferred channel when it comes to purchasing travel for Millennials (70 percent) and for Boomers (90 percent). Of all respondents, female Boomers are least likely to order products online. Also, female Millennials are not shopping online for PCs, insurance or banking accounts at the same rate as their counterparts.

Millennials and Boomers differ when it comes to what they say is the most influential source of information during the purchase process (Figure 1). Word-of-mouth is the most important source influencing Millennials across all key categories. Search engines are also a factor in all categories but they hold slightly less influence than word-of-mouth.

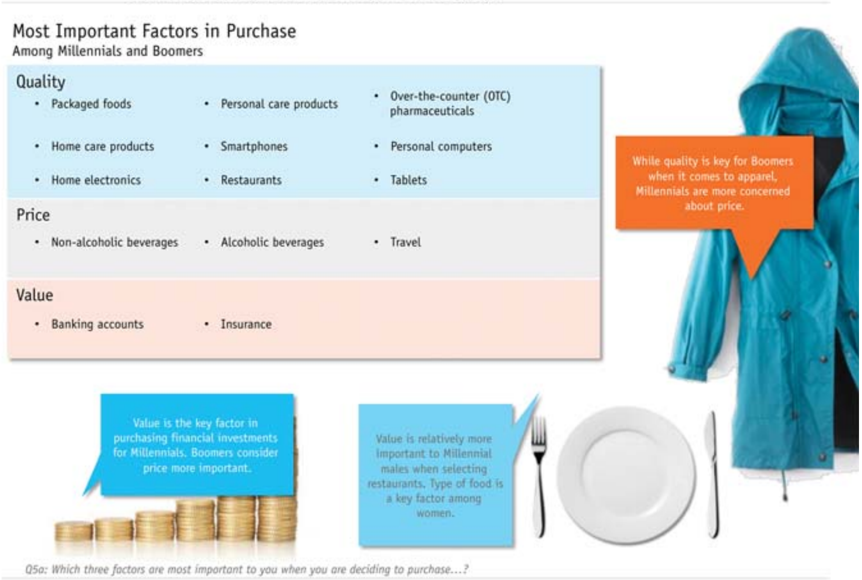
Boomers tend to be influenced by traditional advertising and advice from sales reps. An exception to this is travel purchases, where Boomers are swayed primarily by word-of-mouth sources and, incidentally, do a very high percentage of purchasing online.

Shopping trends indicate that while marketers should expect to see both Millennials and Boomers using the same purchase channels, they should be prepared to leverage different influencers and different product features, depending on the group they are looking to engage.

Active product researchers

Boomers and Millennials are active product researchers. PCs are the primary means for accessing product information, with 90 percent Millennials and nearly that many Boomers (86 percent) using a computer to conduct research. As expected, product research via smartphone is higher among Millennials, with 60 percent saying that they've used the device for this purpose. And a full 20 percent of Millennials indicate that smartphones are their primary device

Figure 2 While Millennials are relatively more price-conscious overall than Boomers, the two groups generally have similar concerns when making purchasing decisions. Both tend to focus primarily on quality or price/value, depending on the category.



for conducting product research.

By contrast, only 14 percent of Boomers say they use a smartphone to access product information. And there is still a role for more traditional media, as 38 percent of Boomers will consult newspapers and magazines for information, twice the rate of Millennials.

But, as it turns out, new media and technology are not just for the younger set. While still below the usage rates of Millennials, Boomers are embracing new communication platforms. More than 70 percent of Boomers say they text. Virtually all Millennials do. Both are engaging via social media at healthy rates. For example, female Boomers and Millennials use Facebook at a nearly identical rate (90 percent). And streaming movies and television programming is a reality for both Millennials (77 percent) and Boomers (40 percent).

Boomers' usage rates of the newer media still lag behind Millennials. A third of Boomers use Twitter but two-thirds of Millennials do. Half of Millennials, but only 10 percent of Boomers, use Instagram.

While Millennials are using newer technology at a higher rate, marketers should realize that the pattern of adopting new technology among Boomers is similar to that of their counterparts. Millennial use appears to be a good predictor, as Boomers are gravitating toward the same devices and platforms. They are just one or two steps behind.

Key findings in categories

The degree to which the similarities among and differences between Millennial and Boomer shoppers show up in market varies by category (Figure 2). Here are some key findings in categories where both groups are actively spending.

Apparel

While both Millennials (81 percent) and Boomers (76 percent) bought apparel in the past six months, a larger number of Millennials spent more this year than in the previous year. More Boomers scaled back their apparel purchases in the same period.

Both Millennials and Boomers say that price and quality are the top two factors impacting purchases of apparel. Millennials tend to pay attention to price first. Boomers look at quality first. Most Millennials and Boomers shop for apparel in a physical retail store. Millennials are more likely to do so online.

Online sources like search results, retail sites and social media, coupled with word-of-mouth, are influencing Millennials' apparel purchases. Boomers were significantly less influenced by these sources.

Dining

In dining, both Millennials and Boomers frequent restaurants at nearly the same rate: six-to-seven times each month on average. Specifically, in the previous three months, Millennials visited restaurants an average of 21.7 times and Boomers made 18.8 visits in the same period of time. The number of visits, however declines markedly with age among Boomers. Boomers under 55 years of age visited an average of 22.2 (on par with Millennials) but average visits

5 ways to engage Millennial shoppers

There are 79 million Millennials. That's a massive amount of buying power. Marketers across all categories are looking for strategies to help capture this spending. Here are five things marketers can do to boost engagement with Millennials.

1. Play to the positive with Millennials. They have a more optimistic view on the economy and are more likely to maintain or even grow their spending during tough times.

2. Optimize digital media for smartphones. The majority of Millennials use smartphones to access product information. And for 20 percent of them the device is their primary way of researching prior to purchase.

3. Have a shopper marketing strategy. Millennials may have a rich digital life but retail stores are still the preferred venue for making most of their purchases.

4. Provide blogs, reviews and chats as part of your digital offering. Word of mouth has the most influence on Millennials. Engage them by creating ways for them to share information with each other.

5. Recognize that Millennials are a diverse group. Nuances like gender require at least as much attention as do generational distinctions when it comes to engaging Millennials.

from Boomers over 60 dropped to 15.6.

One-third of Millennials are spending more in restaurants compared to a year ago. Less than one-quarter of Boomers are. Next year, fewer Millennials and Boomers anticipate spending more when they dine out.

Quality is the leading factor impacting restaurant selections for both Millennials and Boomers. Price is next for everyone except Millennial females, who look at type of food before price when making their decision.

Travel

In the travel category, the purchase behavior of Millennials and Boomers is strikingly similar. They are traveling at the same rate, with roughly one-quarter making a purchase in the past six months. Both are also similar in what factors impact purchase: price, value and quality, in that order. Millennials and Boomers also anticipate the same rates of change in spending, with roughly 40 percent indicating they'll spend more next year and 13 percent saying they will spend less. Finally, word-of-mouth is the top source of influence when it comes to travel.

Surprisingly, more Boomers (90 percent) made their travel purchases online. And the number of Millennials purchasing travel at a retail stores was three times the number of Boomers.

Packaged foods

Purchases of packaged foods among Millennials and Boomers occurred overwhelmingly at a retail store. Only 10 percent of Millennials and 4 percent of Boomers bought items online. Quality and price are leading factors influencing purchase. While percentages both groups making packaged foods purchases in the past six months were similar, nearly half of Boomers anticipate increasing spending in the category, vs. 39 percent of Millennials. Advertising plays an important role in influencing both, but word-of-mouth is most important to Millennial shoppers.

Look beyond the categories

While it is beneficial to understand the similarities and differences between generational groups, it is also important for marketers to look beyond these overarching categories. For example, study results point to several instances where the gender gap may play as great a role in purchasing behavior as the generation gap.

The gender gap in Millennial consumer purchasing, for example, is most apparent in the financial services category. Millennial females are significantly less likely than Millennial males to have obtained a bank account (26 percent among Millennial males vs. 17 percent among females) or insurance (23 percent to 14 percent) in the past six months. In addition, Millennial males are three times as likely as females to have made a personal financial investment in the past six months (15 percent vs. 5 percent).

In consumer electronics, the purchase levels of Millennial females are also comparatively lower. While Millennials overall are key buyers of electronics/computing devices, Millennial females significantly trail Millennial males in the purchasing of tablets (36 percent vs. 25 percent), smartphones (52 percent vs. 39 percent), PCs (44 percent vs. 34 percent) and TVs/home entertainment systems (54 percent vs. 40 percent).

And, as touched on previously, when selecting restaurants, type of food is a key factor for Millennial females while Millennial males say that value is relatively more important to them.

Nuances such as gender require at least as much attention when it comes to engaging both Boomers and Millennials. If a marketer is focused on Boomers or Millennials as a single group, they may be missing opportunities to optimize engagement, especially when, as the study suggests, the generation gap in terms of purchasing trends may not be as wide as anticipated in any given category.

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financial services

Not charging forward

Why the credit card industry will never be the same again

| By Roy Persson

snapshot

An overview of the forces and events that have changed the credit card industry and clouded the future of paying with plastic.

The world in which credit card issuers live has changed greatly since the Great Recession. Economic pressures have decreased consumer consumption levels, reducing card-based revenues. The U.S. government has levied regulations to protect American consumers and merchants; this has decreased debit business revenues and limited the fee policies of credit cards, increasing pressure on card issuers to cut costs and services. Consumer attitudes, in the face of a slowed economy and deteriorating savings rates, generated more conservative credit card debt management perspectives, particularly amongst Millennials.

The impact of these changes is a decline in revolving credit card balances, leading to a continued decline in interest revenue. Lastly, trends in prepaid cards, loyalty programs, social media and mobile technology have combined to change the face of consumer payments.

Organizational adaptation to social media and mobile technology is not just an opportunity; it is a mandatory requirement for survival in the evolving payments world. Consumers are changing how they think about their banking and payments methods and this has changed the way financial companies are coming to market to meet a variety of consumer needs.

Dramatic shift

The Great Recession triggered a dramatic shift in household spending behavior: real personal consumption expenditures trended down for six quarters, the personal saving rate more than tripled from around 2 percent to over 6 percent and households began a sustained deleveraging of debt process that is ongoing. Beyond consumer consumption woes, the downturn profoundly damaged the labor market, as non-farm payroll employment declined by about 8.5 million jobs from peak to trough. As a result, the U.S. unemployment rate increased from 4.7 percent in November 2007 to a peak of 10.1 percent in October 2009.[1]

The result was particularly troublesome for credit card issuers; credit card default rates doubled, hitting 8 percent by 2010.[2] But behind the obvious economic impacts of limiting a consumer's ability to both spend and make credit card payments was a tidal wave of shifting

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attitudes from both consumers and the government. Together these forces would continue to clamp down on credit card profit margins. The U.S. government and American people energetically assigned blame, and big banks were set up to be punished for the Great Recession.

In January 2011, the U.S. Financial Crisis Inquiry Commission concluded that the U.S. financial crisis was indeed avoidable. The Commission's report also found that key policy makers were ill-prepared for the crisis – slow to respond and lacking a full understanding of the financial system they oversaw.[3]

In response, Capitol Hill worked to pass a series of financial industry regulatory bills. These laws would bring about the most significant changes to financial regulation in the United States since the regulatory reform that followed the Great Depression. The regulations that greatly impacted the credit and debit card industry fell under the CARD (Card Accountability Responsibility and Disclosure) Act, later leading to additional regulatory controls by the passing of the Dodd–Frank Wall Street Reform and Consumer Protection Act (signed into federal law by President Obama on July 21, 2010)[4].

The CARD Act was meant to curb unscrupulous credit card issuer behavior; now, millions of credit card users are protected from retroactive interest rate increases on existing card balances, have more time to pay their monthly bills, receive greater advance notice of changes in credit card terms and have the right to opt out of significant changes in terms on their accounts. Fee and interest revenue generated on credit cards are now more tightly controlled. These revenues were tightened by a few key changes such as credit card payments always reducing highest interest balances first, over-limit fees must now be "opted in," the removal of double-cycle billing (finance charges must be associated with purchases made in the current cycle rather than going back to the previous billing cycle to calculate interest charges) and one-time late fees being capped at $25.[5] The CARD act also makes marketing of credit cards much more transparent, thanks to the use of the Schumer box, which displays all the card terms much like FDA nutrition labeling.

Unfortunately, the result of the CARD Act may not be as rosy as it first seems; restricted revenue sources and increased costs for conducting marketing initiatives leave credit industry analysts to conclude that the credit card reform law has made credit cards somewhat more costly for all users and less accessible for people with low income and bad credit[5]. Data from Mintel Comperemedia supports these conclusions, revealing increased average annual fees and relatively high APRs, particularly for consumers with less than stellar credit.

First blow

But the CARD Act was just the first regulatory blow delivered in 2009. The Durbin Amendment, part of the Dodd–Frank Wall Street Reform Bill, continued to put pressure on larger U.S. banks. Debit cards surged in popularity, primarily as a check-writing alternative as well as substitute for credit cards among consumers with poor credit. Not surprisingly, when banks started earning significant revenues from debit card swipe fees (interchange fees), the pressures of competition forced them to return much of their gains to consumers in the form of lower fees and better service[6].

Over the course of the decade, the value merchants paid for swipe fees increased – not due to interchange fee hikes but instead because of the increase in consumers using debit cards for payments[6].

In response to the increased burden to merchants, the Durbin Amendment was passed to regulate debit card swipe fees. The Fed instated a maximum interchange fee of 21 cents plus 5 basis points multiplied by the amount of the transaction per debit card transaction, which CardHub.com estimated would cost large banks $9.4 billion annually[7].

The belief that merchants have used these savings to pay back consumers with discounted product pricing still remains hotly contested by industry experts; however, it is widely agreed that the Durbin amendment has pushed banks to make up for lost swipe-fee revenues. In response, banks are finding new ways to monetize checking accounts (only 40 percent of checking accounts were free in 2012), such as maintenance fees, higher out-of-network ATM fees and selling data to retailers. Unfortunately, those who cannot qualify for or want to avoid credit cards will be forced to pay more for checking accounts or resort to high-fee prepaid debit cards[8]. Yet again, we have another losing proposition for the under-banked consumer.

Consumers also responsible

While American banks' failure to govern themselves ultimately led to economic turmoil, research shows that consumers were also responsible. Americans have long failed at being financially capable, lacking skills in future planning, choosing financial products and financial decision making. People do not make provisions for unexpected events and emergencies, leaving themselves and the economy exposed to shocks of the sort witnessed in the Great Recession. In terms of debt management, Americans engage in behaviors that can generate large expenses, such as sizable interest payments and fees. The most worrisome finding is that many people do not seem well informed and knowledgeable about their terms of borrowing[9].

In a twist of irony, the recession may have proved to be the learning experience Americans needed to change their financial attitudes. As a result of "tough times" and reduced savings rates (nearly 0 percent) consumers have turned not to foolish spending but to better debt-management behavior. More Americans in 2011 were debt-free than in comparison to the year 2000. The percentage of U.S. households carrying any debt dropped to 69 percent in 2011 from 74 percent in 2000[10]. In addition a growing share of a consumer's disposable income is being diverted to service credit card debt[11].

As if current social viewpoints towards credit card debt weren't troubling enough for the credit card industry, the future consumers appear to be even more skeptical. Millennials are making their debut as young adult consumers in today's marketplace. This generation, which ranges in age from 18 to 34, has been raised during two of the most tumultuous economic events in American history: the early 2000 stock market crash and the Great Recession. As a result their views on money management are a bit more conservative than those of most Americans. Two-thirds of them save the cash left over from their paychecks and 18 percent use excess cash to pay off debt. Also the topic of debt among Millennials is a sensitive one as most of their debt stems from credit cards issued prior to the CARD Act and student loans.

About half of them have student loan debt which averages $37,100 and 45 percent of them have credit card debt that on average totals $5,448. Also, according to a public affairs study at Ipsos, a growing number of young adults say they are reluctant to apply for and use credit cards. Given these statistics and their exposure to economic turmoil in their adult life it's no surprise that they are skeptical about traditional bank offerings – another social trend which will stymie credit card revenue growth in years to come[12].

Loyalty programs another threat

Another threat to the credit card industry can be found in loyalty programs. Although loyalty programs have been around for quite some time, consumer enthusiasm to embrace them has not receded but rather has rapidly grown over recent years. Doubling in size since 2000, the number of U.S. loyalty programs reached two billion in 2011. Retailers continue to pour on the investment, spending $50 billion a year on loyalty programs. And the return, according to consultant company McKinsey, is well worth it, boosting profits by 20 percent when executed properly[13].

This proliferation of loyalty programs reflects a changing market environment that is increasingly characterized by intense competition and consumers demanding compensation for their loyalty[14]. What is daunting about these loyalty programs is how they can eventually cut credit card interaction directly out of the equation. For example retailer Target issues its Red Card, which is either a debit or credit card (per customer choice) loyalty program hybrid. This card provides consumers with both a form of payment as well as a loyalty scheme generating up to 5 percent in discounts and free shipping on Target.com.

Placed enormous pressure

Economic, political and social changes have placed enormous pressure on credit card organizations to think strategically about how to generate a profitable payments service business. Interestingly, technological advances which have been ramping up, especially in the mobile space, have provided the credit card industry with equal amounts of opportunity and threat. For example many businesses are discovering that social media campaigns, commonly accessed via mobile devices, are essential components of their digital strategy; and credit card companies are especially motivated to execute on social platforms.

Over the last three years, increased regulation on direct marketing has forced U.S. credit card companies to reconfigure their marketing tactics. These companies are now growing increasingly prevalent in the social and mobile communication sphere, where reward and loyalty programs are catching on, particularly with social gaming venues[15]. While social media has provided cheaper marketing alternatives (versus traditional direct marketing) other forms of technology advances may have opened a Pandora's Box of credit card industry change.

Your mobile wallet

The next battleground where credit card giants will scuffle will still be found in your pocket; interestingly it's not your physical wallet but rather your mobile one. The mobile payments market is set to explode, according to Juniper Research, which predicts it will reach $670 billion by 2015. The most popular method of mobile payment is the point-of-sale technology such as Google Wallet and Isis, used to collect various modes of payment to a consolidated mobile application.

Another critical development is in near-field communications (NFC) technology, allowing electronic devices to establish radio communications, which is just one of many ways mobile devices (and even credit cards) can take advantage of mobile payment technology[16]. While some mobile phone technologies provide a mixture of opportunity and threat, some technology advances bring nothing but dilemma for the credit card industry. Two forms of mobile technology meet this definition; peer-to-peer mobile payments such as PayPal mobile and direct-carrier mobile payments like Boku. Both peer-to-peer and direct-carrier technologies will completely remove credit card interaction from the equation[16].

It's worth noting that even while point-of-sale and NFC technologies can be combined to bring digital interaction and remove the age-old physical swipe (further entrenching credit cards into our daily lives), they can also be used to proliferate the use of the ever more popular loyalty programs. The result brings loyalty programs, debit cards, credit cards and prepaid debit cards into the same mobile phone, creating a competitive landscape with a variety of new players. An example of a new mobile competitor, which is already executing successfully on its closed-loop mobile strategy, is Starbucks, which has nine million mobile application users, who are generating 10 percent of its transaction volume (which is now free of swipe fees!)[17].

Looking forward, a variety of factors will change the way that consumers pay for their purchases. One factor is the availability of NFC-enabled mobile phones; it is believed that one in five smartphones already have NFC-enabled technology[18]. The availability of these types of smartphones is said to trigger a 4,800 percent rise in mobile commerce by 2015, up to $119 billion. Eventually mobile payments will overtake traditional credit card payments by 2020 and NFC-enabled phones alone are predicted to displace cash transactions by 2016[19].

Another driving force is how both the under-banked and the Millennials come together with mobile payment technology. It is estimated that 15 percent of the U.S. population is under-banked, displaced by a turbulent economy and financial regulations, and reportedly they are much more likely to use their mobile devices and/or prepaid debit cards for payments[19]. In addition, younger generations of Americans are quickly embracing prepaid cards and mobile payment technologies; 39 percent of Millennials already claim to have used their mobile phone to make a payment[20]. As a result, the growth of mobile commerce means that mobile payments will eventually go mainstream. It's widely understood that it has the full potential to replace cash, check and/or credit card transactions[21].

Think carefully

It's clear that credit card issuers must think about their business in tiered levels – affluent, mass-market and under-banked – each of which requires a specific product offering. This strategy is not only more profitable but mitigates unnecessary credit risks. In addition, credit card issuers will need to think carefully about how to bring credit cards to the mobile wallet with innovation that can rival loyalty rewards programs.

The future is not a dark one; the data which will be received by the use of mobile wallets and apps will be far more rich than previous consumer transaction data. From this information credit card issuers will be positioned to think about manners of bringing customized and tailored services to new segments of their business, especially the Millennial generation.

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••• mobile research

Making the move to mobile research

A primer for client and supplier-side research professionals

| By Patricia Graham and Sean Conry

snapshot

The authors outline the internal processes behind their decision to use mobile methods for CPG and pharmaceutical research projects.

It is no secret that mobile is a tremendous opportunity for market researchers. The most recent version of the annual Confirmit Market Research Software Survey by Tim Macer and Sheila Wilson of meaning ltd. reported that participation in normal online surveys via mobile devices nearly doubled in just one year. In contrast, just a year earlier, the mobile opportunity seemed to be passing us by, when Macer and Wilson's study found that a full 62 percent of research firms had no policy whatsoever for engaging mobile respondents.

When it comes to companies not in the business of providing research services, the Temkin Group found that 68 percent of firms planned to focus more on their mobile experience in 2013 (Customer Experience Plans and Expectations for 2013). While we wait to see how 2013 actually finished with respect to this goal, the hype and hope are there. Yet uncertainty lingers about how to execute a mobile research strategy – via apps, Web, SMS and more – and business leaders are still uncertain about what the impact of a successful campaign looks and feels like.

Now that companies are aware that mobile can be a crucial component to market research programs, the next step is for companies to focus on how they can effectively execute their mobile plans. In this article, we aim to demystify the mobile research process by spending less time talking about the future of mobile and more time talking about two mobile programs we recently planned, executed and analyzed for a major consumer packaged goods (CPG) company and a pharmaceutical provider within a health care setting. For both, the core ingredients for success were:

The players: determining who within an organization to involve in the campaign strategy, decision and execution.

The platforms: evaluating the pros and cons of SMS, mobile Web and mobile applications as engagement platforms.

The path to getting started: build vs. buy decisions and how to evaluate vendors to find the best fit.

The process and performance: getting started, what to expect and analyzing business impact.

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For any new technology, mobile or not, it's necessary to create a roadmap that outlines the adoption process and introduces a robust framework for business transformation.

Both the CPG and pharmaceutical company sought to solve a business problem for which none of the traditional approaches seemed to quite fit. Each needed to get closer to its customers and influencers and there was a realization that context was key. The CPG company wanted better visibility into how people used its baking products, under what circumstances they used them and with whom. This information would help fine-tune audience segmentation and uncover add-on or cross-marketing opportunities.

The pharmaceutical company wanted real-time insight from oncologists about how a drug was performing, why and when a doctor prescribed it, concerns or questions from patients and specific reasons why a doctor might switch medication treatment options.

A mobile research campaign – with its benefits of immediacy, portability and audience ease of use – would transform what was historically a projective exercise ("What do you think you will do?") to an in-the-moment exercise ("Take us along with you the next time you…").

The players

How many cooks should you invite to the kitchen? For any new process to be implemented or organizational change to take place, leaders from all affected business units must take part. If this is your organization's first foray into mobile research, it is best to get the right people excited and collaborating as soon as possible. After all, the results will become assets across the company, not just in one division. These people will be your early adopters and will bring the rest of the organization with them through telling others about the value and experience.

Thus, leaders from operations, panel relations, client service, VOC and IT should be brought together. It is also our experience that initiatives directed top-down from the chief strategy officer (or equivalent) carry a greater deal of weight and therefore, a shared commitment for success.

Once our core teams were in place, we reviewed the mobile strategy in light of the potential benefits to end-users of research, not only for one direct line of business but also as a means of delivering very current attitudinal and behavioral information across the enterprise.

The platforms

The three main modes of mobile research data collection platforms are SMS, mobile Web and mobile applications. We evaluated the pros and cons of each.

SMS – or text-message – data collection has a unique benefit of being able to reach just about every phone in use today. However, the mode suffers from a few key limitations:

- text-only data collection limits question types available to research designers;
- SMS communications have a limit of 140 characters per message; although some users have access to MMS (the more highly capable multimedia messaging service), many do not and thus branding and visual appeal are limited;
- text messages can be delayed in delivery and thus a "ping-pong" approach to asking questions increases the burden on the respondent;
- text message surveys can become costly for respondents without an unlimited text plan.

Because of these factors, the maximum length of a text-message survey is about five questions. This mode is extremely useful for quick polls but not for interactive research which will enable new insights.

The mobile Web is a compelling offering relative to SMS in terms of enhancing question types and visual appeal of a mobile survey and is very well-suited to one-off surveys delivered by e-mail or text. The mobile Web is a preferred mode for an organization that wants to offer simple Internet studies on a wide variety of devices, whether feature-rich or not.

In contrast to the mobile Web, **mobile apps** can more easily take advantage of the native capabilities of a device, such as the camera, microphone and other sensors. While this is changing with the ever growing adoption of HTML5 and there are now mechanisms to collect Web-submitted photos, an app provides a dedicated experience on a consumer's phone and therefore provides a destination to which they can return for ongoing participation. There is also less waiting with apps, as they rely on device processing power as opposed to the strength of the device's Internet connection at the time of capture and upload. In our experience, these are the unique capabilities most likely to open new research and thus revenue opportunities.

Mobile apps lend themselves to many scenarios, including young-adult research, longitudinal diaries of behaviors and attitudes, mobile ethnography and in-the-moment insights.

Furthermore, although apps need Internet access at some point for communications, they do not require a continual connection in order to make participation viable. They can therefore be used on transit underground, deep within a concrete building or even on an airplane.

After evaluating all three mobile research platforms in light of the research objectives, we chose mobile apps for both the CPG and pharmaceutical company initiatives. The ability to incorporate elements like location, videos and pictures helped formulate apps that were fun and engaging and, most importantly, widely used and successful.

In fact, we are increasingly seeing hybrid approaches across the various platforms to benefit from the best of both worlds. For example, methods that combine apps for in-the-moment quick, multimedia-rich feedback, with Web-based surveys to follow-up and dig more deeply into the respondent experience and resulting activities are proving extremely useful. However, at the time of these projects we opted to keep it simple and begin with a single-platform initiative.

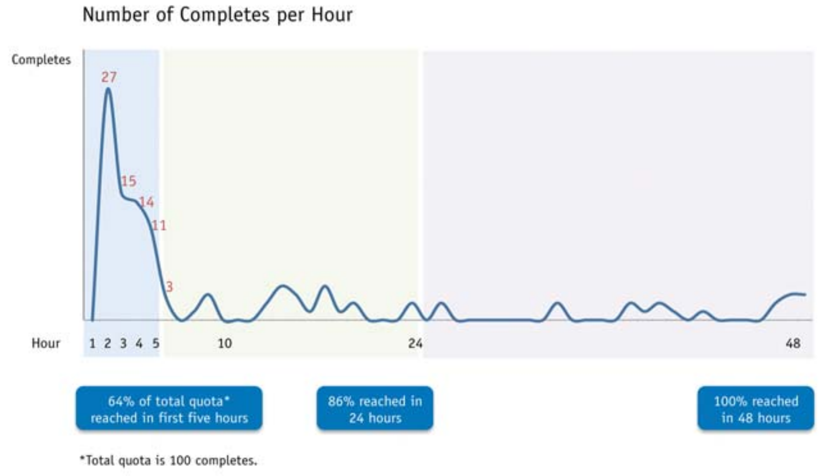
The path to getting started

In both cases, our team was faced with the decision of choosing to adapt current in-house survey systems to offer the mobile app capability or select a new system that specialized in the task. Given the speed at which mobile technology is advancing, coupled with the availability of existing technology to meet the research need described above, a decision was quickly made by GfK to leverage a market solution provided by Confirmit rather than to build it on a proprietary basis.

GfK's IT team was heavily involved in the decision and during the vendor search it focused on the operational requirements that would enable us to deploy the mobile app to online panels efficiently and cost-effectively.

The evaluation of the marketplace and potential partner selection process

Figure 1



took place over a 12-week period to fully understand the available and future technology landscape.

Vendor selection criteria included the requirements delineated below.

Primary considerations: multilingual support; picture and video support; devices supported (platform-agnostic); licensing model; staff needed for programming; survey logic allowed (piping, conditional, etc.); data exports; offline data capture; types of questions able to deploy; future plans – strategic direction; vendor experience, vendor development plans; user satisfaction feedback; ability to white-label the respondent experience.

Secondary considerations: real-time reporting; other multimedia (photo capture, etc.); GPS support; browser-based vs. app; emulator; program language supported; ability to add survey functions; quotas possible; redirect to URL; hosted vs. on-premise server.

The process and performance

CPG mobile app

For the CPG mobile app, a panel of 10,000 customers was screened for smartphone qualification as well as providing mobile contact information. The screener had a completion rate of 47.6 percent and of those who completed the screener, 33.8 percent fully qualified and opted-in for mobile app research.

For this initiative, we wanted to know what the customer was currently baking (including recipe), who the baked item was intended for, how baking the item made the respondent feel and how the ingredients were chosen. We also requested pictures of the baking process and the final product.

While we had expected to be in field for seven-to-10 days, the quota was filled within two days, with 64 percent filled within the first five hours of launch (Figure 1). Keeping in mind that this was a task- or activity-based exercise, the results exceeded expectations.

What was also eye-opening was the level of intimacy and the holistic views we achieved from our respondents through the combination of qualitative and quantitative elements. We received photos and videos of people baking and a complete willingness and excitement to share personal experiences and stories with the brand.

The pharmaceutical mobile app

Typically, obtaining physician feedback for marketing research purposes can take several weeks. Surveys are completed hours, if not days, after seeing a patient and the time delay can impact a physician's recollection of the patient's emotions and specific questions asked. Pharmaceutical companies rely on this important information to help determine ways to better develop, adapt and market therapies to improve patient outcomes.

According to a Mobile KN study of 363 oncologists, 87 percent own smartphones. With this knowledge, we incorporated video, photos and audio capabilities into a mobile application survey to give oncologists options for immediately communicating feedback to the pharmaceutical company.

Following a screening process, 180 oncologists participated in the program and were instructed to complete a five-minute mobile survey after meeting with a patient moving into a second line of treatment.

The program had tremendous success, including:

- 242 patients profiled by oncologists;
- pictures, voice and video that brought emotion to the statistics (80 percent of the oncologists provided a video, picture or voice recording with their feedback);
- real-time insight into specific treatment decisions including factors such as efficacy, safety, economics, patients' influence over the treatment decisions, etc.;

Oncologists raved about the mobile survey application and said it was "exciting, interesting and convenient to use." Other oncologists asked for "more surveys like this" and noted that it was "nice to be able to complete a survey on my device wherever I am and at my own convenience."

Personal, portable, available

We attribute the success of both mobile initiatives to having converted the research into a conversation with the respondent that was personal, completely portable and available, contextual and relevant. These are aspects that, when deployed appropriately via mobile apps, can achieve a holistic view of the consumer experience.

Through our approach we: found novel and unexpected ways to grow lines of business; uncovered opportunities to emotionally connect with audiences; gathered valuable and unique content from key customers and patients; provided evidence of target markets using a product in real time; and determined the impact of customer/patient emotions and attitudes.

These results, coupled with our experiences to date, confirm that mobile research can indeed help us learn something we did not know before, something that leads to new actions large and small.

Are you convinced that the "mobilesphere" is the place to access and engage with customers, physicians and patients? If so, how will you get started making the move to mobile-based research?

Patricia Graham is chief solution strategist, consumer experiences at GfK Custom Research, Chicago. She can be reached at 312-416-3660 or at patricia.graham@gfk.com. Sean Conry is vice president business development, mobile solutions in the Vancouver, British Columbia office of research company Confirmit. He can be reached at 604-435-6007 ext. 103 or at sean.conry@confirmit.com.

Names of Note

■ *Hall & Partners Health*, a specialist division of London researcher Hall & Partners, has hired **Marc DeCongelio** as director, qualitative research, and **Frank Harrison** as research director, health. Additionally, Hall & Partners Health has promoted **David Spears** to partner, U.S. health. All three will be based in New York.


Harrison


Spears

■ London research company *YouGov* has named **Timothy Kane** CMO. Kane will be based in New York.

■ *20|20 Research*, Nashville, Tenn., has named **Angela Williams** vice president, sales and business development, 20|20 Technology.


Williams

■ **Laurie Kaman** has joined *iTVX/Rentrak Corp.*, a Portland, Ore., research company, as senior vice president, branded entertainment.

■ *Ipsos Healthcare*, a New York research company, has hired **Sue Wild** as head of the qualitative health care team; **Eric Blouin** as senior vice president, custom oncology; **Mary Tou** as senior vice president; **Tom Nolte** as global head of innovation; and **Kris Klein** as vice president, commercial strategy and forecasting. Tou will be based in Seattle, Nolte in Princeton, N.J., and Klein in Parsippany. N.J.

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■ *On Device Research*, London, has appointed **Martin Tomlinson** as managing director of its Singapore office.


Tomlinson

■ **Karen Kornbluh** has joined New York researcher *The Nielsen Company* as executive vice president, external affairs. She will be based in Washington, D.C., and split her time in New York.

■ *Lightspeed Research*, Warren, N.J., has appointed **David Shanker** as CEO, the Americas, and promoted **Daniel S. Fitzgerald** to the global chief client and marketing officer.

■ **Laura Perkins** has joined *Smarty Pants LLC*, a Johnson City, Tenn., research company, as insights guru. She will be based in Boston.


Perkins

■ *Nielsen NeuroFocus*, a Berkeley, Calif., research company, has named **David Brandt**, executive vice president, advertising effectiveness strategy.

■ *The Direct Marketing Association*, New York, has appointed **Christopher J.W. Oswald** as vice president, state affairs. He will be based in Washington, D.C.

■ **Ben Leet** has been promoted to managing director, Europe, of Encino, Calif., research company *uSamp*.

Separately, uSamp's co-founders **Matt Dusig** and **Gregg Lavin** have left the company.

■ *Schlesinger Interactive*, a division of Iselin, N.J., research company Schlesinger Associates, has hired **Kristen Tripphahn** as vice president, global panels.


Tripphahn

■ *Market Strategies International*, a Livonia, Mich., research company, has promoted **Tish Hasting** to vice president, analytics, and **Sue Nicol** to vice president, research management. Additionally, the company has hired **Janice Anderson** as vice president, technology; **Rob Delghiaccio** as vice president, health care; **Paul Hartley** and **Dawn**


Hasting


Nicol


Anderson


Delghiaccio


Hartley


Palace


Oberle

Palace as vice president, communications; and **Chris Oberle** as senior vice president, energy.

■ *M3 Global Research*, Washington, D.C., has appointed **Alan Mavretish** as vice president, market research, and promoted **Brooke Allen-Watson** to U.S. qualitative manager.

■ **Judith Passingham** has been named global CEO of *Ipsos Interactive Services*, the online research division of Paris research company Ipsos.

■ *MedPanel LLC*, a Cambridge, Mass., research company, has hired **Jason LaBonte** as president, insights.

■ **Neil Berg** has joined *MarketVision Research*, Blue Ash, Ohio, as research manager, marketing sciences.

■ **Richard Waring** has joined *Catalyst Marketing Research*, Dublin, Ireland, as partner and director.

■ *FleishmanHillard*, a St. Louis division of Diversified Agency Services, has hired **Christina Liao** as senior vice president and senior partner, director of applied data.

■ **Rahul Jerome** has joined *Brightlines*, a Wiltshire, U.K., translation company, as head of innovation and strategy.

■ **Susan Feinberg** has been hired as senior consultant at *Graber Associates*, a Burlington, Mass., research and communications company.

■ London research company *Verve* has hired **Luca Antilli** as partner.

■ **Andy Weiss** has been promoted to chief business officer of New York research company *Abt SRBI*.

■ **Rick Kelly** has been named associate vice president, sales, at *Borderless Access*, a Bangalore, India, research company. He will be based in Salt Lake City.

■ **Gemma Stephenson** has been named research manager at *Facts International*, an Ashford, U.K., research company.

■ **Josephine Hansom** has been appointed to lead London research company *YouthSight*'s brands, policy and professional team. YouthSight has also hired **Katie-Rose Gilmore** as project executive; hired **Esme Mathieson** as account manager; and promoted **Tatenda Musesengwa** to director, client services.

■ *Razor Research*, London, has promoted **Yasmin Scott** to senior research executive.

■ Palo Alto, Calif., survey software company *SurveyMonkey* has hired **Jon Cohen** as vice president, survey research.

■ *Kinesis Survey Technologies LLC*, Austin, Texas, has appointed **Daniele Pizzocchero** to lead the European customer support team.

■ London research company *TNS* has promoted **Chhavi Bhargava** to managing director, India and Sri Lanka.

■ New York research company *GfK* has hired **Pat Pellegrini** as executive vice president, media and entertainment and digital market intelligence.

■ **Helen Burt** has been named manager, customer experience operations, of *eDigitalResearch*, Hampshire, U.K.

■ Marion, Iowa, research company *Frank N. Magid Associates* has hired **Mike Bloxham** and **Debby Ruth** to head the company's national television and video practice.

■ *Majestic MRSS*, a Mumbai, India, research company, has appointed **Bhawana Sinha** as senior director, client servicing, MRSS India; **Majid Dasurkar** as regional manager, MENA; and **Ashutosh Jathar** as director, project management, MRSS India.

Research Industry News

News notes

■ Los Angeles media subscription service **Hulu** has been sued for violating federal law for illegally sharing users' viewing history with **Facebook**, San Francisco, and **comScore Inc.**, a Reston, Va., research company. The lawsuit seeks class-action status on behalf of Hulu users nationwide and was brought by several people in California, Illinois and New York seeking damages of at least $2,500 per violation, plus punitive damages and other sums.

In San Francisco, U.S. Magistrate Judge Laurel Beeler rejected Hulu's argument that viewers needed to show actual injury to recover damages, even if they qualified as "aggrieved" persons under a 1988 federal law protecting the privacy of video renters. Beeler concluded that "the statute requires only injury in the form of a wrongful disclosure" before damages might be available. She did not rule on the merits of the case.

■ Nashville, Tenn., research company **Dataium** has reached a $400,000 settlement agreement for a lawsuit brought by the **State of New Jersey**, alleging that Dataium tracked Web users without consent, also known as history sniffing, and selling personally-identifiable information on to **Acxiom**, a Little Rock, Ark., information company, again without notice or permission.

■ Several law firms have launched investigations into potential claims against the board of directors of Rochester, N.Y., research company **Harris Interactive** related to the proposed acquisition of the company by New York researcher **The Nielsen Company**.

This investigation concerns whether Harris Interactive's board of directors breached its fiduciary duties to stockholders by failing to adequately shop the company before agreeing to enter into the proposed transaction and whether the company disclosed all material information to shareholders about the transaction.

Among the firms investigating are the Law Offices of Howard G. Smith; Faruqi & Faruqi LLP; The Young Law Firm; Levi & Korsinsky LLP; Wohl & Fruchter LLP; Rigrodsky & Long P.A.; and Former SEC Attorney Willie Briscoe and Powers Taylor LLP.

■ Following an almost-three-year investigation, Indian authorities have arrested the masterminds behind the **Speak Asia** survey fraud. In 2011, **ESOMAR**, Amsterdam, the Netherlands, along with **MRSI** (now ORC International), a Cincinnati research company, actively advocated strict action against Speak Asia, which had been allegedly running pyramid fraud multilevel marketing schemes that encouraged participants to pay large sums of money to become members of Speak Asia, where they would receive rewards for completing research questionnaires/surveys.

On November 25, 2013, the Delhi police crime branch arrested one of the senior Speak Asia executives accused of defrauding gullible participants of an estimated Rs 2,200 crores ($350,000).

■ **Food Perspectives Inc.**, a Plymouth, Minn., research company, has been certified as a Women's Business Enterprise by the Women's Business Development Center – Chicago. The certification confirms the business is at least 51 percent owned, operated and controlled by a woman or women.

Acquisitions/transactions

■ London research company **BDRC Group** has acquired **Viewpoint Field and Studios**, London. Viewpoint will continue to operate as a standalone qualitative field and studio business, complementing the work carried out by **Perspective Research Services**, London, which is also part of the BDRC Group.

■ U.S. audit, tax and advisory firm **KPMG LLP** has acquired **Link Analytics LLC**, an Atlanta research company.

■ St. Louis customer experience company **Answers Corporation** has acquired Ann Arbor, Mich., research company **ForeSee Results Inc.**

■ San Francisco research software company **Splunk Inc.** has acquired Mountain View, Calif., big data analytics company **Cloudmeter Inc.**

■ Westport, Conn., research company **IMS Health** has acquired **Pygargus**, a Stockholm, Sweden, analytics firm.

■ **Yahoo!**, Sunnyvale, Calif., has acquired New York natural language processing company **SkyPhrase**. SkyPhrase's team of four will join the Yahoo! Labs team in New York.

■ **Apple**, Cupertino, Calif., has acquired San Francisco research company **Topsy Labs** to help with social media analytics.

■ Montreal research company **Seevibes** has acquired **TvTweet**, a Bordeaux, France, social TV measurement firm.

■ New York researcher **The Nielsen Company** has agreed to acquire Rochester, N.Y., research company **Harris Interactive** for $2 per share for a total of $116.6 million.

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■ U.K. research company **RealityMine** has acquired New York research company **USA TouchPoints**.

■ **Target Research Group Inc.**, Nanuet, N.Y., has purchased **A&G Research Inc.**, Montvale, N.J.

Alliances/strategic partnerships

■ **Stagnito Media**'s **Retail Leader Group**, Chicago, has formed a strategic partnership with the **Food Marketing Institute** (FMI), an Arlington, Va., research company. FMI will be featured in every issue of *Research Leader*, sharing content in the areas of food safety, public affairs, education, research, industry relations programs, etc.

■ Research companies **Ipsos MediaCT**, New York, and **I-Behavior Inc.**, Louisville, Colo., have partnered allow I-Behavior to onboard and distribute digital audience segments based on the Ipsos Affluent Survey USA.

■ Research companies **IRI**, Chicago, and **Intage**, Tokyo, have partnered to give IRI clients access to Japanese retail point-of-sale data via the IRI Global Executive Market Reviews service. In turn, Intage will provide CPG and retail information and insights to their clients from all markets IRI serves.

Association/organization news

■ **The Council for Research Excellence** (CRE), New York, has approved the following members: **Judy Vogel** of Gannett Company Inc.; **Michael Nathanson** of MoffettNathanson LLC; and **Bryon Schafer** of Warner Bros. Television. All three were prior CRE members while with other companies and were readmitted.

Awards/rankings

■ **Jamin Brazil** of Fresno, Calif., research company Decipher Inc. has been named a winner in the Executive of the Year category for the 2013 Best in Biz Awards. The award recognizes services and products that reflect the most current trends in technology.

■ **Coyne Research**, Dublin, Ireland, won the Grand Prix award from the **Marketing Society**, Middlesex, U.K., for work it carried out for retailer Lidl Ireland.

New accounts/projects

■ **Watermelon Research**, London, has chosen Oslo, Norway, research software company **Confirmit** to provide interactive voice response and online market research for its clients.

Additionally, Farmington Hills, Mich., research company **Morpace Inc.** has selected Confirmit's Confirmit SODA app to power its mobile research initiatives.

■ **Tenthwave Digital**, a New York marketing agency, has adopted Boston research company **Crimson Hexagon**'s ForSight social media monitoring and analytics platform.

■ **Acxiom**, a Little Rock, Ark., information company, has signed a multi-year agreement with **Starcom MediaVest Group** (SMG), Chicago, to provide SMG clients access to Acxiom's Audience Operating System.

■ Portland, Ore., research company **Rentrak Corp.** has signed a multi-year contract with **Mad Men Marketing Inc.**, Jacksonville, Fla., for Rentrak's StationView Essentials TV ratings service. Rentrak has also signed a multi-year local TV ratings contract with **West Virginia Media** for eight stations.

■ **Spotlight Research**, Poland, has adopted the Beacon research and reporting platform from **Decrypt**, the London branch of Fresno, Calif., research company Decipher Inc.

■ **The GfK Group,** a Nuremberg, Germany, research company, has been chosen by four of Brazil's broadcasters, **Band TV, Record**, **RedeTV!** and **SBT**, to provide TV audience measurement, effective 2015.

New companies/new divisions/relocations/expansions

■ London research company **Kantar** has merged its Kantar Retail division with London research company **TNS**' Retailer & Shopper practice to form a new organization that will operate under the **Kantar Retail** name.

■ New York research company **Millward Brown** has opened an office in Jeddah, Saudi Arabia. Piotr Chodakowski will lead the operation.

■ Palo Alto, Calif., research software company **SurveyMonkey** has announced plans to open an office in London in first-quarter 2014.

■ London research company **YouthSight** has moved its offices to Crystal Gate, 6th floor, 28/30 Worship Street. All other contact information will remain the same.

■ Communications agency **Asda'a Burson-Marsteller** has launched **Penn Schoen Berland**, the company's first Middle East office in Dubai, United Arab Emirates.

■ Researcher Naim ul Qadar, formerly of uSamp India, has launched **NextON Services Private Limited**, a New Delhi, India, research company. The company is online at www.nextonservices.com.

■ Berlin research company **SensoMotoric Instruments** has opened an office in San Francisco.

■ **Polaris Marketing Research Inc.** has relocated its Atlanta headquarters to 11175 Cicero Drive, Suite 100, Alpharetta, Ga. All other contact information will remain the same.

■ **Harmon Research Group Inc.**, Anaheim, Calif., has completed construction of its call center in San Jose, Costa Rica.

Research company earnings/ financial news

■ **Confirmit**, Oslo, Norway, announced financial results for third-quarter 2013. Confirmit doubled its mobile app responses over third-quarter 2012 to 5.2 million. Confirmit also achieved 130 percent growth in multi-year contracts for the year to date, with a 50-percent increase for the third quarter alone.

■ **MARSC Limited,** Surrey, U.K., reported 2013 revenues up over 20 percent compared to 2012.

CALENDAR OF EVENTS

can't-miss activities

The Southwest Chapter of the Marketing Research Association will hold its annual Las Vegas conference on February 12-14 at the Mirage Hotel and Casino in Las Vegas. Visit www.swmra.org/events/vegas2014.

The Pharma CI Europe Conference and Exhibition will be held on February 18-19 at the Renaissance Barcelona Fira Hotel in Barcelona, Spain. Visit www.pharmaciconference.com.

The Merlien Institute will host a conference, themed "Qualitative 360 Europe," on February 19-20 at the Novotel Istanbul in Istanbul, Turkey. Visit http://qual360.com/europe.

American Leaders will host a conference, themed "Customer Experience Management in Utilities: The Era of Empowered Customers," on February 24-25 in Baltimore. Visit http://bit.ly/1acx9dU.

Marcus Evans will host a conference, themed "Consumer Insights in New Product Design and Delivery," on February 26-27 in Miami. Visit www.marcusevans-conferences-northamerican.com/events.asp.

NewMR will hold a virtual event, themed "Explode-a-Myth," on February 25 at 9 a.m. CST. Presenters will each have five minutes and one slide to put forward an MR myth to bust, a bubble to burst or a hyperbole to deflate. The audience will then have 10 minutes for Q&A and rebuttal. Visit http://newmr.org/events/2014-2/explode-a-myth.

Unicom will hold its DevOps Summit on February 27 in London. Visit http://devopssummit.com.

Unicom will hold its Application Lifestyle Managment conference on February 27 in London. Visit http://conferences.unicom.co.uk/application-lifecycle-management.

Unicom will hold a conference, themed "Business Efficiency Through Process Improvement," on February 27 in London. Visit http://conferences.unicom.co.uk/process-improvement.

The American Marketing Association will hold a conference, themed "Analytics with Purpose: Behavioral Insight to Advantage," on March 2-4 at the Hotel del Coronado in Coronado, Calif. Register by February 2 for an early- bird discount. Visit www.marketingpower.com/Calendar/Pages/analytics-with-purpose-II.aspx.

Worldwide Business Research will hold its flagship conference, "eTail West," on March 3-6 at the JW Marriott San Antonio Hill Country Resort and Spa in San Antonio. Visit www.etailwest.com.

The Merlien Institute will hold a conference, themed "Market Research in the Mobile World Asia," on March 4-7 in Singapore. Visit www.mrmw.net.

The Neuromarketing Science and Business Association will hold its annual world forum on March 5-7 in New York. Visit www.neuromarketingworldforum.com.

Alta Plana will hold an event, themed "Sentiment Analysis Symposium," on March 5-6 at The New York Academy of Sciences in New York. Visit www.sentimentsymposium.com.

The Pharmaceutical Marketing Research Group will hold its annual national conference on March 9-11 at the Gaylord Palms in Orlando, Fla. Visit www.pmrg.org.

IRI will hold its annual summit on March 10-12 at the Gaylord Palms Resort in Orlando, Fla. Visit www.iriworldwide.com.

The Council of American Survey Research Organizations will hold its digital research conference (formerly the CASRO online research conference) , themed "Online + Mobile + Big Data," on March 11-12 at the Westin Riverwalk in San Antonio. Visit www.casro.org/?14drcvenue.

The American Marketing Association will hold a program, titled, "Marketing Research Academy for Business Professionals," on March 18-21 at the University of Georgia Terry College of Business Executive Education Center in Atlanta. Visit www.marketingpower.com/Calendar/Pages/2014-Marketing-Research-Academy-for-Business-Professionals.aspx.

Worldwide Business Research will hold a conference, themed "Next Generation Customer Experience," on March 18-20 at the Omni San Diego in San Diego. Visit www.the-customer.com.

Liveweek Business will hold a conference, themed "Market Research Week 2014: Research to Strategic Insight," on March 20-21 at the Guragon Exhibition and Convention Center in Gruagon, Delhi, India. Visit www.marketresearchweek.com.

ESOMAR will hold its annual Central and Eastern European research forum, themed "Research Remix," on March 23-24 at the Novotel Bucharest City Centre Hotel in Bucharest, Romania. Visit www.esomar.org.

The International Quality and Productivity Center will hold a conference, themed "Big Data Retail Forum," on March 24-26 in Chicago. Visit www.bigdataretailforum.com.

Strategy Institute will hold a conference, titled "Customer Experience Strategies Summit," on March 25-26 at The Ritz-Carlton in Toronto. Visit www.customerexperiencecanada.com.

The Conference Board will hold its customer experience conference, themed "The Transformative Customer Experience," on March 27-28 at the Ritz-Carlton New York, Battery Park. Visit www.conference-board.org.

Worldwide Business Research will hold its digital travel summit on April 1-3 in Las Vegas. Visit www.digitaltravelsummit.com.

The Merlien Institute will host a conference, themed "Qualitative 360 North America," on April 2-3 in Toronto. Visit http://qual360.com/north-america.

ESOMAR will hold its annual Latin America conference, themed "Accelerating Growth," on April 2-4 in Buenos Aires, Argentina. Visit www.esomar.org/latam.

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.

2014 Research Software Directory

The 2014 Directory of Marketing Research Software was compiled by sending listing forms to companies we identified as producers/vendors of marketing research-related software. This year's directory lists over 150 firms and over 360 software titles. The software firms are arranged alphabetically. Along with the company's vital information, we've also included the title(s) of the software they sell.

To make finding software easier, we have added a section of cross-references in which providers are grouped by solution capability.

A searchable version of this directory is available on our Web site at www.quirks.com

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(See advertisement on p. 54)

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fforkin@rdagroup.com
www.rdagroup.com
Frank Forkin
Software:
TabRight

ReadSoft, Inc.
Metairie, LA
Ph. 504-841-0100 or 888-READSOF(T)
support-us@readsoft.com
www.readsoft.net
Software:
ReadSoft Documents for Forms

Red Centre Software Pty Ltd
Upper Ferntree Gully, VIC, Australia
Ph. 61-4-1930-9158
sales@redcentresoftware.com
www.redcentresoftware.com
John Gwyther
Software:
Ruby COM
Ruby DESKTOP
Ruby LASER

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Research Metrics LLC
Toledo, OH
Ph. 800-600-0699 or 419-469-5535
sales@researchmetrics.com
www.researchmetrics.com
Todd Carnahan, Market Development Manager
Software:
MobiAudit
Shopmetrics
Surveo

Research Metrics offers technology platform solutions to mystery shopping and market research providers worldwide. With data centers worldwide and offices in North America and Europe staffed with over 70 full-time employees, we are committed to providing the industry benchmark in technology for mystery shopping and market research. Our products such as the Shopmetrics mystery shopping platform; MobiAudit mobile scheduling and data-collection app; and Surveo survey collection and reporting suite provide a fully-integrated suite for online and offline data collection, delivery and analysis.

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

Revelation Global
Portland, OR
Ph. 503-808-1492
info@revelationglobal.com
www.revelationglobal.com
Megan Thye-Walker
Software:
Revelation Next

Revelation Global creates technology which enables digital qualitative research. Our mobile app, Revelation Next, is used by the world's top marketing and research agencies and consumer-goods companies to get unprecedented access to the behaviors, responses and motivations of their consumers in the moment. With headquarters in Portland, Ore., our fast-growing company of 20+ people supports online qualitative research studies across the globe. To find out more vist www.revelationglobal.com. Follow us on Twitter @RevelationInc.

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Ph. 49-911-81-005-50
info@rogator.de
www.rogator.de
Christine Roth
Software:
Software G3 plus

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Princeton, NJ
Ph. 609-452-0060
info@ronin.com
www.ronin.com/dc
Software:
Results for Research®

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A Division of ATP Canada Software and Services Ltd.
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Dave Homer, President
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www.roymorgan.com
Portia Morgan, VP-Business Development
Software:
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ASTEROIDSearch

run-e GmbH & Co KG
Dortmund, Germany
Ph. 49-231-56-483-00 or 49-89-6425-6984
oliver.bischof@run-e.com
www.run-e.com
Oliver Bischof
Software:
MR Orga Suite (MROS)
ProjectSuite (PS)
SampleMaker SM

Salford Systems
San Diego, CA
Ph. 619-543-8880
info@salford-systems.com
www.salford-systems.com
Software:
CART
MARS
RandomForests
SPM Salford Predictive Modeler
TreeNet

Sammamish Data Systems, Inc.
Bellevue, WA
Ph. 425-867-1485 x1 or 800-689-6848
sales@sammdata.com
www.sammdata.com
Bob Schweitzer
Software:
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Postal Carrier Route Polygons
Zip + 2 Polygons
Zip + 4 Centroids
Zip Code Polygons

Sawtooth Software, Inc.
Orem, UT
Ph. 801-477-4700
support@sawtoothsoftware.com
www.sawtoothsoftware.com
Brian McEwan, Director of Client Services
Software:
ACA System
ACBC System
CBC System
CCEA System
CVA System
MaxDiff/Web
Menu-based Choice
SSI Web

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Northbrook, IL
Ph. 847-239-7300
joe@sawtooth.com
www.sawtooth.com
Joseph Curry
Software:
Sensus Web
WinCATI
WinCATI Mixed Mode

Smart Software, Inc.
Belmont, MA
Ph. 617-489-2743 or 800-SMART-99
info@smartcorp.com
www.smartcorp.com
Software:
SmartForecasts®

SMI
SensoMotoric Instruments
Boston, MA
Ph. 617-557-0010
info@smivision.com
www.smivision.com
Software:
SMI Begaze
SMI Experiment Center
SMI Experiment Suite 360

SMP Research Software
Sydney, NSW, Australia
Ph. 61-2-9299-4666
jhughes@smpsurveys.com
www.smpsurveys.com
John Hughes, Managing Director
Software:
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www.snapsurveys.com
Marianne Witts
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Snap Survey Software

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Portsmouth, NH
Ph. 603-610-8700 or 800-997-SNAP (7627)
sales@snapsurveys.com
www.snapsurveys.com
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Snap Surveys offers the complete survey solution - both survey software and research services for all your survey needs. Snap Survey Software is a powerful, intuitive survey solution for questionnaire design, publishing, data collection and analysis. Snap Survey Software supports all survey modes (online, mobile, e-mail, paper, scanning, kiosk, phone, PDA, tablet PC), and offers robust analysis capabilities (tables, charts, reports, descriptive and multivariate statistics) and is very extensible - MS Access or SQL database connectivity and seamless integration with MS Office (Word, Excel, PowerPoint, Access) and SPSS.

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Hispanic Spot TV Plus
NetCosts
Spot Radio
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WebCosts
WRAP

SSI
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info@surveysampling.com
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Software:
QuickTake
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SSI offers two 24/7 sample ordering tools; SSI QuickTake™ for online sample and SSI-SNAP for telephone sample - both indispensable for survey researchers. SSI-SNAP is an easy-to-use telephone sample ordering application. The menu-driven software offers access to telephone sample - including wireless/mobile numbers - and gives users the option for sample screening, business number removal and more. SSI QuickTake online sample interface allows clients to pose questions in a meeting and receive results before it's over! It's the only DIY tool backed by SSI's gold-standard SSI Blend.
(See advertisement on p. 33)

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www.stata.com
Software:
Stata

StatGeneral
Encino, CA
Ph. 1-818-574-6887
info@statgeneral.com
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Software:
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David Walonick, President
Software:
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info@statpoint.com
www.statgraphics.com/
Software:
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Statgraphics Centurion XVI.I Bilingual
Statgraphics Centurion XVI.I Multilingual
Statgraphics Centurion XVI.I Professional
Statgraphics Online
Statgraphics Sigma Express
Statgraphics Web Services

StatSoft, Inc.
Tulsa, OK
Ph. 918-749-1119
info@statsoft.com
www.statsoft.com
Kyra Matzdorf
Software:
STATISTICA

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

Survey Analytics
QuestionPro.com
Seattle, WA
Ph. 206-686-7070 or 800-326-5570
gina.yeagley@surveyanalytics.com
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Software:
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SecondPrism
Survey Analytics Enterprise Research Platform
SurveyPocket
SurveySwipe

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Ph. 303-449-2969
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www.surveyconnect.com
Marcie Levine, President
Software:
ActiveView 360
ActiveView Express

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Jay Farr, Owner
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SurveySquare.com

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Joe Williams
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SurveyWriter

SurveyWriter is a global leader in the technology of Web-based survey research. We are an application service provider (ASP), supplying professional research organizations of all sizes the tools to collect, manage, analyze and report data. We provide free training and free support to ensure that our clients are empowered to carry out the most robust, cost-effective research in the industry. With no upfront costs, no network administration and the best feature-to-price ratio in the industry, SurveyWriter is the survey tool for online research.

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info@tactician.com
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TacticianMarketManager
TacticianMarketOptimization
TacticianMedia
TacticianOne
TacticianOnline
TacticianStrategy

Techneos Systems Inc.
a Confirmit Company
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sales@techneos.com
www.techneos.com
Sean Conry
Software:
SODA - Survey on Demand Application

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Ph. 517-381-2300 or 800-517-3001
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www.techsmith.com
Software:
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Raymond Benack, President
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(See advertisement on p. 31)

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Panel Profile Builder
Vovici 6
Vovici Mobile
Vovici Social

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info@weekscomputing.com
www.weekscomputing.com
Tony Weeks, Partner
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U-Tab™

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www.jwdp.com
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marketing@westat.com
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BrandTrend XL
WRC Explorer

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Audience Response Software

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Reply, Fleetwood Group, Inc., p. 57

CAPI/CASI Survey Solutions

(Personal and self-service survey software)

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(Telephone Interviewing Software)

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Data Mining/Perceptual Mapping Software

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••• advertising research

Charles Young looks at the impact of the iPad on advertising.

••• advertising research

Kathryn Winland presents a case study involving PayPal's use of bulletin board focus groups to test marketing and advertising campaigns.

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To increase respondent engagement, forget gamification, says author Annie Pettit, and try humanizing your surveys instead.