

Study on the use of software and other productivity tools in marketing research centres in North America

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http://www.izusoft.com

METHODOLOGY

As part of its research activities, Info Zero Un (the producer of the Interviewer software) asked **Circum Network** to measure the use of software and other productivity enhancement tools in marketing research companies in North America. The study is based on a telephone survey of firms owning a CATI system, and involved in market research or policy research. The sampling base included all members of Canadian and American professional associations. A total of 226 interviews were completed, with a response rate of 26% and a refusal rate of 9% (48% of potential participants could not be reached during the study period). Data collection started on May 14 and was completed by June 12, 1998. The average duration of an interview was 20.8 minutes. The sample was weighted to represent CATI market shares.

CATI INSTALLATIONS

- Sawtooth products (Ci2 et Ci3) are the most popular (24%); 60% of Sawtooth systems are installed on computer networks and

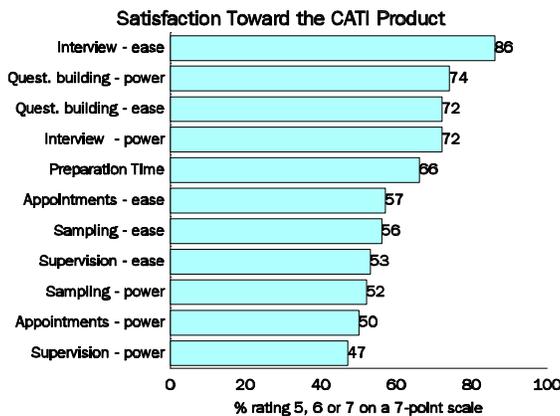
40% on individual stations. Custom and unclassified products account for a large part of the market (31%). In terms of stations, however, Quantum and "other" products win a quarter of the market each.

Market Shares

CATI	Share of installations	Share of stations
Sawtooth Products	24%	14%
ACS Query	14%	15%
CfMC	12%	12%
Quantime	9%	26%
Interviewer	6%	3%
Dash	4%	4%
Others and custom	31%	26%

- Between 1981 and 1995, there was a rapid increase in new CATI installations, followed by a drastic drop between 1996 and 1998.

- The average size of installations is 69 stations but half of all installations comprise between 1 and 30 stations; another third consist of between 31 and 75 stations.
- 29% of existing installations have switched CATI software at some point in the past.



- There is room for improvement in the CATI client satisfaction levels. While ease of use during the interview does not pose problems, various aspects of field management are less than satisfactory.

- Clients are less satisfied with the CATI producer than with the product. Availability of technical support is considered adequate but the correction of bugs and the clients' influence over software modifications are not satisfactory.

CAPI AND WEB

- Only 17% of the firms currently use computer assisted personal interviewing, and another 11% are seriously considering this market.
- Web surveying is still a low-use curiosity activity (which means nothing about the state of this market in 12 or 24 months). Some 22% of data collection firms have tested web surveying and 26% have plans to do it. Only 14% have no plans to investigate web interviewing.

PREDICTIVE DIALERS

- More than nine companies out of ten have heard of predictive dialling technology but usage rates are much lower: only 11% of installations use a predictive dialler. Another 12% seriously consider acquiring this technology.
- Globally, predictive dialler clients are satisfied with the level of integration between the dialler

and their CATI. They are significantly more satisfied with the power of their dialler than with its ease of use. Generally speaking, predictive dialler clients have reservations about the service offered by their supplier.

- Good news: expectations about productivity improvements related to predictive dialling are below reality. On average, companies without a predictive dialler expect a 28% productivity increase whereas users of predictive diallers report a 37% increase in productivity.

TABLES AND STATISTICS

- Nine data collection companies out of ten use a cross-tabulation software product.
- SPSS is clearly the most popular product but this software is heavily criticized in terms of integration with their CATI software and ease of use.
- Globally, firms are satisfied with their cross-tabulation software and few (17%) intend to change within 24 months.
- Close to six companies out of ten use some multivariate analysis software. SPSS dominates this market with a 68% market share.