

CHAPTER 1: INTRODUCTION

The Giftng Report 2015 Overview

The giftng market – defined as items or experiences purchased to give as a gift – represents roughly 10 percent of the total GAFO retail market. Making a gift purchase is an important motivator for retail shopping throughout the year, but most especially during the Christmas holiday gift buying season which officially kicks off the Friday after Thanksgiving. Called 'Black Friday,' this day is so named because it marks the period when retailers go from being in the red (i.e., posting a loss on the books) to being in the black (i.e., turning a profit).

Commenting on the importance of gift shopping to the U.S. economy, Lee Eisenberg in his book *Shoptimism: Why the American Consumer Will Keep on Buying No Matter What* writes: “The gifts we give, to others or to ourselves, add up to one enormous gift to the Sell Side. Each of us, on average, spends a couple of thousand dollars a year on gifts, roughly half of it during the ‘Hard Eight,’ that is, the eight-week holiday shopping season.”



Consumer research that focuses on giftng (i.e. “verb”), not the gift (i.e. “noun”)

Gift shopping is the ultimate in ‘emotional consumerism,’ since gift giving is all about emotionally connecting gift givers and gift recipients. Whenever consumer shopping behavior is driven by emotion, the overall goal of the shopping experience is for the customer to buy a thing in order to achieve a special feeling, enhance an experience or to deepen an emotional reaction. In other

words, the gift itself (i.e. “noun”) is the means to an end, and that end is to strengthen the emotional connection between individuals. The challenge for gift retailers and gift marketers, then, is how to enhance the “giftng” experience (i.e. “verb”). As a result, giftng is the topic under investigation in this research study.

This current report is a totally new look at the gift-giving practices and shopping behaviors of Americans. Building upon previous research conducted on the giftng market, this study presents an expanded view of consumers' gift buying and giving behavior based upon a survey of n=1,649 gift buyers in 2015.

Intended for marketers and retailers that tap the gift market, this report presents:

- **Giftng behavior by holiday and occasion:** Key characteristics of the giftng market, such as on what holidays and occasions consumers buy gifts, how many people they buy gifts for and their relationship with the gift recipient, such as spouse, child, close family member, etc. and how much they spend. This report also reveals what range of products people choose for gifts, what drives their selection of particular gifts and what drives their selection of stores to shop for gifts.
- **Demographics of the giftng market:** How many households buy gifts, how much they spend by key demographics, and the key different demographic segments within the gifts market (e.g. HHI, age, size, composition, education, etc.)
- **Gifts market buying behavior:** What are the primary characteristics of the consumers' buying behavior related to different gifts? What makes a good gift? What attributes and qualities make gifters want to buy? Where do they shop for these items; how do they decide to purchase one item over another? What is the role of brand in giftng buying behavior? What is the purchase incidence and spending on key categories of gifts?
- **Psychographic profile and segmentation of the giftng market:** The psychographic profile of gift consumers reveals their different drives and motivations in purchasing gifts. What factors are more or less

important in driving gift purchasing decisions? How can gifts marketers and retailers better understand the hearts and minds of their consumers and use that insight to capture a greater share of the consumers' gifting budget? In essence we reveal "why people buy gifts."

- **How gifters use the internet for gifting:** In addition, this study delves into how gifters use the internet in planning their gift selections, researching their gift purchases as well as places to shop, and actually making purchases. Overall, half of those surveyed (51%) rated the internet as one of their 'favorite' gift shopping destinations, making this by far the most popular gift shopping destination, with the second most popular destination being discount mass merchandisers, rated their favorite by 37% of gifters.

This report includes more gift data including:

- **Deep dive into Christmas gift and birthday gift buying behavior:** This year for the first time detail data is collected about each product gift bought for Christmas and birthday gift giving, plus where people shopped for each of those gifts. This data allows marketers to determine whether people's shopping behavior is different for these two most important gift shopping experiences and the other gift holidays and occasions throughout the year.
- **Gift choices ranked as 'favorite' gift category:** Data is collected about 10 different gift categories, such as personal care items, giftables, consumables, electronics and more and nearly 100 individual product and experience categories, such as candles, DVDs, women's fine jewelry, kitchenware and more. Further each of the ten categories is ranked as to whether it is one's favorite 'go to' gift category, good for most people and most occasions; appropriate for some people and some occasions only; or something consumers rarely or ever give as a gift.
- **Types of stores ranked as their 'favorite' source for gift shopping:** Nearly 40 different types of stores and other shopping venues are tracked in this report, broken into three major categories of shopping venues: General merchandise stores; non-store retailers, internet, catalogs, TV shopping, etc.; and specialty retailers, including book

stores, food stores, drug stores, electronics stores and many others. And each of the 38 stores included in this report are ranked by respondents as either their 'go to' destination for gift purchases; appropriate only for occasions and some people; and stores where one rarely shops for gifts.

- **Store brands where gifters shopped:** The survey includes a range of different types of stores where gifters may have shopped.

THE GIFTING SURVEY

Methodology

An in-depth quantitative survey was conducted in April 2015 among 1,649 gifters. The survey was conducted using an online panel.

Giftng Holidays

- Valentine's Day
- Easter/Passover
- Mother's Day
- Father's Day
- Halloween
- Thanksgiving
- Christmas
- Hanukah
- Kwanzaa (Note: while included in the survey, no gifts were purchased for this holiday in 2015)
- New Year's

Giftng Occasions

- Anniversaries
- Birthdays
- Friendship, Thank you and/or just because
- Graduations
- Hostess and/or Housewarming
- New Baby and/or Baby Showers
- Religious (e.g. first communion, bar mitzvah, etc.)
- Romance
- School Events and/or Teacher
- Travel Gifts & Souvenirs
- Wedding and/or Bridal Showers
- Work-related Events (such as retirements, going-away, etc.)

Trends Tracked from Giftng Survey Conducted in 2012 & 2010

The results of the 2015 survey are compared to a virtually identical quantitative survey conducted in January 2012 among n=1,511 gifters and one conducted in January 2010 among a total of 1,680 U.S. giftng consumers. All three surveys (2015, 2012, and 2010) were conducted using the same online research panel to support consistency and trend tracking across the study years.

Data Collected for Each Holiday and Occasion

The following data was collected about the respondents' giftng for each holiday and occasion (except Christmas and birthdays where more detail data was obtained):

- Number of people gifts were bought for
- Relationship of the gift recipient/s, specifically spouse/significant other; child(ren), close family member (mother, father, siblings, grandparents), other family member (aunt, uncle, niece, nephew, cousin), close personal friend, co-worker, child's friend, casual friend, child's teacher/sitter, or service provider (personal trainer, hair stylist, door man, maid/housekeeper). (Note: Data reported from the 2010 survey)
- Type of gifts bought
- Total amount spent on gifts for that holiday and/or occasion.

Data Collected for Christmas & Birthdays

In addition to the above data, all gifts bought for Christmas and birthday gift giving are also tracked as to place of purchase, for example, if a clothing and/or fashion accessories gift was bought for a birthday, where that purchase was made, either in a specialty store such as a clothing store or in a general merchandise store such as a department store.

Gift Categories and Items

The following ten gift categories and nearly 100 gift items are tracked by holiday and occasion and ranked as to its suitability or preference as a gift:

Consumable Gifts

- Gift Baskets, including cookies, snacks, fruit, candy, wine and other consumables
- Chocolates, Gift Boxed or Pick-Your Own
- Wine and/or Wine Tasting Gifts
- Liquors & Spirits
- Coffee & Tea Gifts
- Other consumables

Clothing and/or fashion accessories (such as handbags, shoes, wallets, etc.)

- Baby/Infant's Clothing, including booties, hats
- Children/Kids Fashion Accessories
- Children's Clothing
- Men's Clothing
- Men's Fashion Accessories (such as bags, belts, wallets, ties, etc.)
- Teen Fashion Accessories

- Teen's Clothing
- Women's Clothing
- Women's Fashion Accessories (such as handbags, belts, wallets, scarves, shawls, etc.)

Jewelry and/or Watches

- Jewelry Boxes, Valets, Watch Cases, etc.
- Men's Costume Jewelry (made from base metals, wood and/or other non-precious metals and/or faux or man-made stones)
- Men's Costume/Casual Watch
- Men's Fine Jewelry (made from precious metals such as gold, platinum, sterling silver and/or precious or semi-precious stones, such as diamonds, rubies, topaz, turquoise)
- Men's Fine/Dress Watch

- Women's Costume Jewelry (made from base metals, wood and/or other non-precious metals and/or faux or man-made stones)
- Women's Costume/Casual Watch
- Women's Fine Jewelry (made from precious metals such as gold, platinum, sterling silver and/or precious or semi-precious stones, such as diamonds, rubies, topaz, turquoise)
- Women's Fine/Dress Watch
- Women's Watch accented with Crystal (i.e. watch accented specifically with crystals)

Personal Care Products (such as cosmetics, perfumes, bath products, personal care accessories, etc.)

- Aromatherapy
- Bath & Body Soaps and Lotions
- Cosmetics
- Feet Care Products
- Fragrance/Perfume
- Hand Care Products
- Personal Care Electric Appliances, such as massagers, shavers, foot baths, nail polishers, dermabrasion appliances, etc.

- Personal Care Gift Sets or Preassembled Personal Care Gift Packs, for bath, body, aromatherapy, face, feet and hands, etc.
- Personal Care Travel Sets
- Skin Care Products

Home furnishings and household operations products (such as home furnishings, decorative accents, housewares, home textiles; china, glass and tableware, small household appliances, home fragrances, BUT not including entertainment, video/audio goods or equipment)

- Decorative tabletop items made from china, glass, crystal, sterling silver, porcelain, etc. (such as candlesticks, vases, candleholders, sculpture, vases, and/or other decorative items)
- Decorative tabletop items made from stone, ceramic, metal (such as candlesticks, vases, candleholders, sculpture, vases, and/or other decorative items)
- Other Decorative tabletop items such as picture frames, mirrors, lamps, baskets, etc. */or other decorative items made from china, glass, crystals, sterling silver)*

- Dinnerware and/or Dinnerware place settings
- Dinnerware serving pieces (such as serving bowls and trays, platters, etc.)
- Flatware and/or Flatware place settings or serving pieces
- Glassware and/or Crystal stemware or bar ware
- Home Textiles, including bedding, table linens, kitchen linens, pillows, throws, etc.
- Kitchenware, Housewares, Cook's Tools
- Outdoor Garden Decoratives or Accents, including planters, outdoor lighting/candles, poolside, yard and patio accessories, etc.
- Pictures and Art, including custom framed art
- Small Household Appliances, such as toasters, blenders, mixers, food processors, etc.
- Wall Decor, Shelves, Wall Accents and Wall Hangings

- Home Fragrance, such as room sprays, oils, diffusers, etc.

Giftables (such as flowers, candles, figurines, collectibles, greeting cards, stationery, crafting kits and supplies, seasonal decorations, gifts for pets and/or other popular gift-type items)

- Baby Giftables, such as baby keepsakes, nursery decor gifts, baby-care accessories such as diaper bags, etc.
- Candles and/or candle accessories
- Figurines and/or sculpture
- Flowers, plants and/or garden accessories, including cut flowers and bouquets
- Gifts for Pets including toys and other pet accessories
- Inspirational and/or religious-themed gifts
- Personal Leather Accessories, such as business card holders, money clips, glass cases, etc.
- Personalized, customized, etched, engraved, monogrammed and/or initialized giftware items

- Scrapbooks and Memory Albums, Scrapbook Kits, Scrapbooking Supplies
- Seasonal ornaments, decorations, figurines, etc.
- Villages and/or Lighted Decorative Buildings for collecting, decorating, display
- Picture Frames and/or Albums
- Memorabilia
- Jewelry Boxes, Trinket Boxes

Books, Recreation Goods and other Non-digital/Electronic Entertainment Goods (*such as books, sporting goods, games, puzzles, etc. Not electronics.*)

- Books
- Plush and/or stuffed animals, including stuff-your-own bears and other animals
- Sporting Goods
- Toys, including action figures, building sets, sports toys, vehicles
- Games/Puzzles
- Dolls
- Infant/Preschool Toys
- Sports Team Logo Gifts

- Automobile and/or Racing-related Gifts

Electronics and Other Entertainment/Sporting Goods Electronics (**personal electronics, such as cell phones, PDA's, MP3 players, cameras and photographic equipment, personal computers, as well as home electronics, such as video/audio, DVD's and entertainment equipment, home computer systems, Wii and electronic games, etc.**)

- Audio Equipment
- Desktop or Home Computers and/or computer equipment and accessories
- DVD/Video Players
- Home Entertainment Systems
- Television Sets
- Electronic Games, such as Wii
- Cameras and/or camera equipment and supplies
- Cellular Phones/Smartphones
- Laptop or Personal Computers and/or computer equipment and accessories
- Notepad or Book Reading Devices, such iPad, Nook, Kindle

- MP3 Players, iPods and other personal audio devices
- GPS Devices
- Audio/CD's
- Electronic Games
- Video/DVD's
- USB Sticks/Drives
- Other Electronics

Store Gift Cards/Mall and Store Gift Certificates *by type of store*

General Merchandise Stores

- Department stores or department store websites (such as JC Penney, Sears, Dillard's, Macy's, etc.)
- Deep discounters/Close-out retailers (such as Big Lots, TJ Maxx, Marshall's)
- Discount department stores and discount mass merchants or discounters websites(such as Wal-Mart, Kmart, Target, Sam's Club, Kohl's, and other discount department stores)
- Dollar stores (such as Family Dollar, Dollar General)
- Luxury department stores or websites (such as Nordstrom, Neiman Marcus, Bloomingdale's, Saks 5th Avenue, Lord & Taylor, etc.)
- Warehouse clubs (such as Costco, Sam's Club, BJ's)

Non-Store Retailers

- Internet or Online websites (such as Amazon.com, eBay.com, etc.)
- Direct mail catalogs (such as Frontgate, Grandin Road, Skymall, etc.)
- TV Shopping (QVC, HSN, Shop NBC)

Specialty Stores

- Art Gallery, Custom Framing Shop, Arts & Crafts Store
- Book, Record, Video Stores (such as Barnes & Noble, FYE, etc.)
- Home Improvement retailers and/or hardware stores (such as Home Depot, Lowe's, Ace Hardware, Menards)
- Candle & Home Fragrance Specialty Store (such as Yankee Candle, Wicks 'n Sticks, etc.)
- Clothing and clothing accessories stores (such as Gap, The Limited, Talbots, Old Navy, Ann Taylor, or other local clothing, shoe and/or fashion accessories store)

- Craft & hobby stores (such as Michael's, Hobby Lobby, Jo-Ann)
- Drug Stores and/or Pharmacies (such as Walgreens, CVS, Rite Aid, etc.)
- Electronics and/or Computer Specialty Store (*such as Best Buy, Apple, Magnolia, etc.*)
- Florists shops
- Food & Grocery Stores (such as Kroger, Albertsons, Safeway, Trader Joe's, Whole Foods, Publix, Giant, etc.)
- Garden centers and/or pool supply stores
- Gift specialty stores and boutiques (such as Hallmark, Carlton Cards, museum gift shops, etc.)
- Gourmet Cooking, Cook's Tools, Kitchenware, Specialty Tabletop store (*such as Williams Sonoma, Sur La Table, etc.*)
- Home specialty stores including furniture and home furnishings stores (such as Pier 1, Bed, Bath & Beyond, Pottery Barn, Williams Sonoma, Crate and Barrel,

Kirkland's, Ethan Allen or local furniture stores)

- Jewelry Stores (such as Tiffany, Zales, Kay, Swarovski, etc.)
- Personal Care, Beauty, Cosmetics or Fragrance Specialty Store (*such as Bath & Body Works, Sephora, Body Shop, Ulta, etc.*)
- Pet stores (such as PetSmart, Petco)
- Sporting goods stores (such as Modells, Cabela's, Nike, Dick's, Academy)
- Toy Stores (such as Toys 'R Us or local independent toy stores)

Gifts of Experience (usually presented as a gift card or gift certificate

- Dining/Restaurant experience
- Entertainment experience (*such as theater tickets*)
- Spa and/or beauty experience gifts
- Sporting events experience
- Travel & adventure experience

Type of Retailers

These were the types of stores and shopping venues where people bought gifts.

General Merchandise Stores

- Department stores or department store websites (such as JC Penney, Sears, Dillard's, Macy's, etc.)
- Deep discounters/Close-out retailers (such as TJ Maxx, Marshall's)
- Discount department stores and discount mass merchants or discounters websites (such as Wal-Mart, Kmart, Target, Sam's Club, Kohl's, and other discount department stores)
- Dollar stores (such as Family Dollar, Dollar General)
- Luxury department stores or websites (such as Nordstrom, Neiman Marcus, Bloomingdale's, Saks 5th Avenue, Lord & Taylor, etc.)

- Luxury discount department stores or websites (such as Nordstrom Rack, Saks Off 5th Avenue, Neiman Marcus Last Call)
- Warehouse clubs (such as Costco, Sam's Club, BJ's)

Non-Store Retailers

- Internet or Online websites (such as Amazon.com, eBay.com, etc.)
- Direct mail catalogs (such as Frontgate, Grandin Road, Skymall, etc.)
- TV Shopping (QVC, HSN, Shop NBC)

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- Pet stores (such as PetSmart, Petco)
- Sporting goods stores (such as Modells, Cabela's, Nike, Dick's, Academy)
- Toy Stores (such as Toys 'R Us or local independent toy stores)

Retailer/Store Brands Rated Good for Brands

These retail store brands were included in the survey as a place where gifters shopped in the past year.

Department and Luxury Department Stores or Website

- Bloomingdale's or Bloomingdales.com
- Dillard's or Dillards.com
- J.C. Penney or JCP.com
- Macy's or Macys.com
- Neiman Marcus Last Call or Lastcall.com
- Neiman Marcus or Neimanmarcus.com
- Nordstrom or Nordstrom.com
- Nordstrom Rack or Nordstromrack.com
- Saks Fifth Avenue or Saksfifthavenue.com
- Saks Off 5th or Saksoff5th.com
- Sears or Sears.com

Discount/Mass Stores

- Costco
- Kmart
- Kohl's
- Sam's Club
- Steinmart

- Target
- TJ Maxx
- Wal-Mart

Specialty Personal Care Stores

- Art of Shaving or Artofshaving.com
- Bath & Body Works or
Bathandbodyworks.com
- Body Shop or Bodyshop-usa.com
- Sephora or Sephora.com
- Ulta or Ulta.com

Jewelry Stores

- Bailey Banks & Biddle or
Baileybanksandbiddle.com
- Ben Bridge or Benbridge.com
- Bulgari or Bulgari.com
- Cartier or Cartier.com
- DeBeers or Debeers.com
- Harry Winston or Harrywinston.com
- Helzberg Diamonds or Helzberg.com
- James Avery or Jamesavery.com
- Jared Galleria of Jewelry or Jarad.com

- Kay Jewelers or Kay.com
- Mayors or Mayors.com
- PANDORA or Pandora.com
- Reeds Jewelers or Reeds.com
- Rogers Jewelers or Rogers-jewelers.com
- Ross-Simons or Ross-simons.com
- Swarovski Boutique or Swarovski.com
- Tiffany or Tiffany.com
- Zales or Zales.com

Specialty Home Stores

- Bed, Bath & Beyond or
Bedbathandbeyond.com
- Crate & Barrel or Crateandbarrel.com
- Pier 1 or Pier1.com
- Pottery Barn or Potterybarn.com
- Restoration Hardware or
Restorationhardware.com
- Sur la Table or Surlatable.com
- West Elm or Westelm.com
- Williams-Sonoma or Williams-sonoma.com

Internet Websites

- Amazon.com
- Ashford.com
- Blue Nile.com
- Buy.com
- eBay.com
- Etsy.com
- Fab.com
- Gifts.com
- Gilt.com
- Groupon.com
- Hautelook.com
- HSN.com
- Ice.com
- Ideel.com
- MyHabit.com
- Net-a-Porter.com
- OneKingsLane.com
- Overstock.com
- QVC.com
- RedEnvelope.com
- RueLaLa.com
- Shopittome.com
- Shopstyle.com
- SmartBargains.com
- ThingsRemembered.com
- ThinkGeek.com
- Woot.com
- Zappos.com

Deep Dive into Internet as Gifting Resource

In addition to questions about use of various internet websites, questions were asked about each holiday and occasion gift purchase, including Christmas and birthdays about the use of the internet:

- To get inspiration or ideas on what types of gifts to give
- To research prices, brands, places to shop for specific gift items
- To purchase gifts online

For those who reported making an online gift purchase for the holiday and/or occasion, they were also asked to estimate what percentage of their spending was made online. Further, they were asked to rate their overall satisfaction with the internet in support of their gift shopping to provide a perspective on where the internet succeeds or fails as a gifting shopping resource.

Added-Value Focus Group Research

Findings from focus groups are included in relevant sections throughout this report to provide additional color and commentary on the motivations and attitudes of gift shoppers. A total of four focus groups were conducted to provide perspective on the motivations and drives of gift consumers. Respondents were recruited based upon high involvement with gift giving and recent purchase history buying products in the major giftware product categories.

Among the four focus groups, a total of 35 consumers were interviewed (18 in Columbus, OH and 17 in LA/Orange County, CA). The respondents were mixed gender, roughly 70 percent female and 30 percent male. Respondents aged 45-to-54 years were the most widely represented age range in the focus groups (37 percent), with the next most widely represented age range those 35-to-44 years (34 percent). About 17 percent of focus group respondents were 55-to-64 years and 11 percent were 25-to 34 years, with no one under 25 years of age included in the groups. All respondents had household income in excess of \$50,000. Coinciding with their higher income level, the focus group respondents were highly educated with about 70 percent or more being college graduates.

Screening criteria was used to identify people who were passionate about gift giving. The following percentage of focus group respondents strongly agreed to each of these attitudinal statements:

When shopping for a gift, I spend lots of time thinking about picking the right gift for the recipient — 83 percent

I enjoy shopping for gifts — 60 percent

I spend more money buying gifts for my friends and family than other people do — 51 percent

I am more involved in gift giving than are most of the other people I know — 37 percent (additional 26 percent agreed with statement)

Gift Marketers: Take Action>>

Pam Danziger & Unity Marketing can help you probe deeper into the gifting market

The *Giftng Report 2015* is a first step for marketers to understand the potential of the gifting market: who they are, what they want, and where they shop; their needs, desires, and aspirations as gift consumers. This is a syndicated report that takes a broad look at the gifting consumer market overall and is designed for the widest audience.

But your business is unique and special. You may want to dig deeper into one segment of the gifting market or slice and dice the general survey data into smaller chunks specific to your business' unique needs. If you want to take the next step in finding opportunities in the gifting market and developing marketing strategies unique to your business, Pam Danziger and Unity Marketing can help. Unity has not only an extensive library of research-based information on the gifting market, including previous surveys to help you track trends and identify shifts, but also research into other markets that might intersect or overlap yours, most notably the affluent consumer segment, which is the economy's 'heavy-lifter' when it comes to any consumer spending. In the past Pam has helped numerous clients maximize the insights available for the asking in Unity Marketing's research library. For example, Unity Marketing offers:

- Customized presentation for your sales meetings, strategic planning initiatives, new product or service ideation and innovation efforts;
- Custom cross tabs and reports to highlight your special segments in the survey database;
- Follow up surveys and focus groups or other qualitative research to test new concepts and initiatives; and
- Surveys of your customer database to find specific opportunities to maximize sales to key segments.

Let Unity Marketing help your business tackle its unique challenges and get to the next level of success by harnessing the power of data-driven, custom-tailored analysis and actionable advice. Call us today!