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Understanding The Changing Needs Of The US Online Consumer, 2010

by Jacqueline Anderson
for Market Research Professionals

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An *Empowered* Report: How Online And Mobile Behaviors Are Changing

by Jacqueline Anderson
with Reineke Reitsma, Erica Sorensen, and Michael Munsell

EXECUTIVE SUMMARY

For the first time ever, the average US online consumer spends as much time online as he or she does watching TV offline. Trending data from 2007 shows that while consumers are continuing to expand their online behaviors, they are more selective about what they're doing online. Many behaviors are limited to a select group of users. But as consumers are streamlining their behaviors on the "traditional" Net, they are also increasingly expanding their activities to the mobile Internet. The Technographics® data presented in this report will help market research professionals understand the existing online landscape as well as prepare for where online consumer behavior is headed.

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NOTES & RESOURCES

Forrester surveyed 30,064 US individuals in January and February 2010 about a variety of topics including online behaviors and media consumption.

Related Research Documents

"A Deep Dive Into Asia Pacific Consumers' Online Behavior"
November 18, 2009

"A Deep Dive Into European Consumers' Online Behavior, 2009"
August 13, 2009

"Consumer Behavior Online: A 2009 Deep Dive"
July 29, 2009

FORRESTER®

CONSUMERS REVEAL THEIR ONLINE BEHAVIORS

With our Technographics data, we've been examining consumers' uses of technology for more than 12 years.[1] In 2010, we asked North American consumers to tell us about their participation (or lack thereof) in more than 100 different online behaviors (see Figure 1).[2] The activities we tracked vary from basic things like checking email to more advanced behaviors like engaging with social media. The variety of activities allows us to create a holistic view of online consumers, understanding where and how they're using the online channel.[3]

Figure 1 Technographics® Tracks More Than 100 Online Consumer Behaviors

"Which of the following activities do you do regularly online?"

Media and entertainment	Communication
• Watch full-length TV shows on Internet sites • Pay to rent or download TV shows/movies online • Listen to any kind of audio/radio on the Internet • Download music for free • Pay to download music • Listen to podcasts • Watch any kind of video on the Internet • Play online games alone • Play online games with others • Upload video to the Internet • Upload music to the Internet	• Use email • Use instant messaging (IM) • Talk to someone using voice IM • Contribute to online forums or discussion groups • Send electronic greeting cards
Social Computing	**Shopping and retail**
• Publish, maintain, or update a blog • Publish or update your own Web pages • Write articles, stories, etc., and post them online • Comment on someone else's blog • Contribute to or edit articles in a wiki • Add labels or "tags" to Web pages, online photos, etc. • "Vote" for Web sites online • Visit social networking sites • Update/maintain a profile on a social networking site • Read online forums or discussion groups • Use peer-to-peer file sharing applications • Watch videos from other users • Participate in an online world • Use Really Simple Syndication (RSS) feeds • View photo-sharing sites • Post to photo-sharing sites	• Research products or services for purchase • Purchase products or services • Use comparison shopping sites • Sign up for free products or coupons • Bid or sell in online auctions • Track the status of orders or packages • Read customer ratings and reviews • Post ratings or reviews of products or services

57861 Source: Forrester Research, Inc.

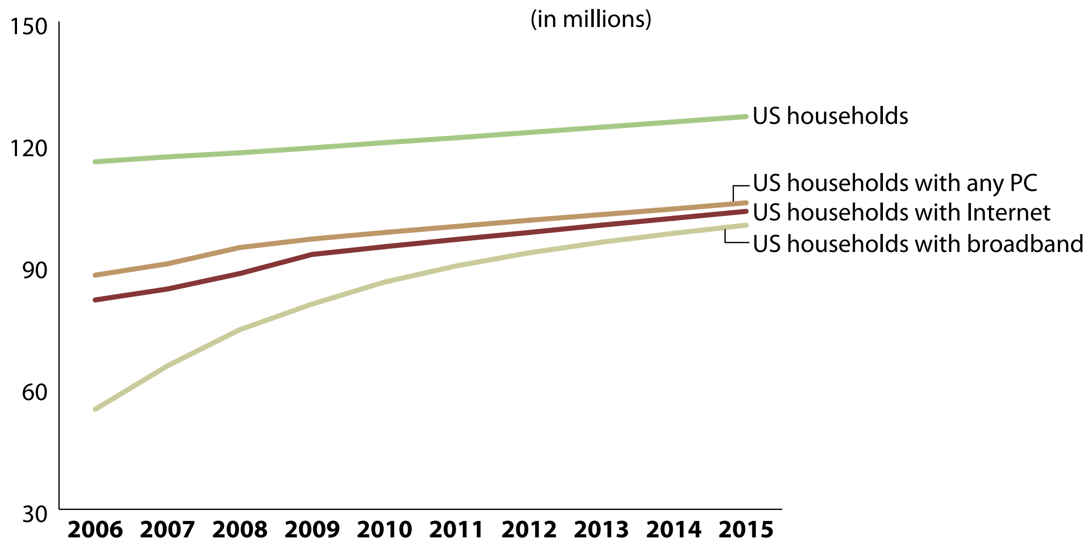
BROADBAND BECOMES THE NORM

Almost 2 million new households will connect to the Internet by the end of 2010 (see Figure 2). While this adoption marks slower growth than the 5 million households that connected last year, we expect this growth rate to continue over the next few years, bringing the Internet to 82% of households by 2015. Broadband will add almost 5.5 million new households this year, meaning that more than 90% of connected households will have access to high-speed connections. When it comes to connecting, we've found that:

- **High-speed connections are the norm.** Ninety-one percent of online households will connect through broadband by the end of 2010. While there is still a technology gap for the 21% of households that don't have home access, the gap is disappearing among the connected. Worries about the user experience of dial-up versus high-speed are gone.[4]

- **Time spent with TV and Internet is now equal.** For the first year ever, the amount of time US households report watching TV offline in an average week (13 hours) equals the amount of time they're spending online (see Figure 3). We've watched over the past few years as Gen Yers' (ages 18 to 30) time with the Internet not only equaled their TV time but also surpassed it, but this year marks the first that Gen Xers (ages 31 to 44) joined that trend. Younger Boomers (ages 45 to 54) also now spend an equal amount of time with both media.[5] This equalization is not fueled by a drastic decrease in the number of hours that consumers are spending with offline TV, which has remained relatively stable over the past five years. Instead, the leveling is driven by the huge growth in time spent with the Internet, up 121% since 2005.

Figure 2 Forecast: US Household Online Adoption, 2010 To 2014



Forecast

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
US households	115.5	116.7	117.7	118.9	120.2	121.4	122.7	124.0	125.3	126.6
US households with any PC	87.6	90.4	94.4	96.5	98.1	99.6	101.1	102.5	103.9	105.4
US households with Internet	81.5	84.2	88.0	92.7	94.6	96.4	98.1	99.9	101.6	103.3
US households with broadband	54.6	65.3	74.2	80.5	85.9	89.9	93.1	95.7	97.9	99.9

Base: US households

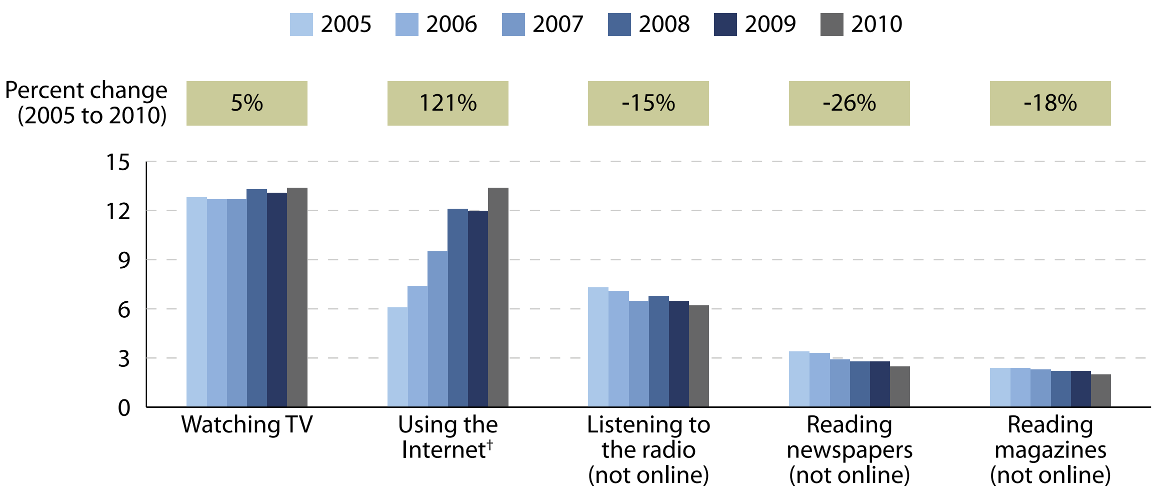
Source: Source: North American Technographics® Benchmark Survey, Q2 2010 (US, Canada); Forrester Research Online Population And Demographic Forecast, 3/10 (US); Forrester Research DTV, HDTV, And DVR Forecast, 2010 To 2015 (US); Forrester Research Online Access Forecast — Broadband, 2010 To 2015 (US); June 17, 2010, "The US Consumer PC Market In 2015" Forrester report.

57861 Source: Forrester Research, Inc.

Figure 3 The US Media Landscape Levels Off

3-1 Time spent online is equal to time with TV

"In a typical week, how many hours do you spend doing each of the following?"*

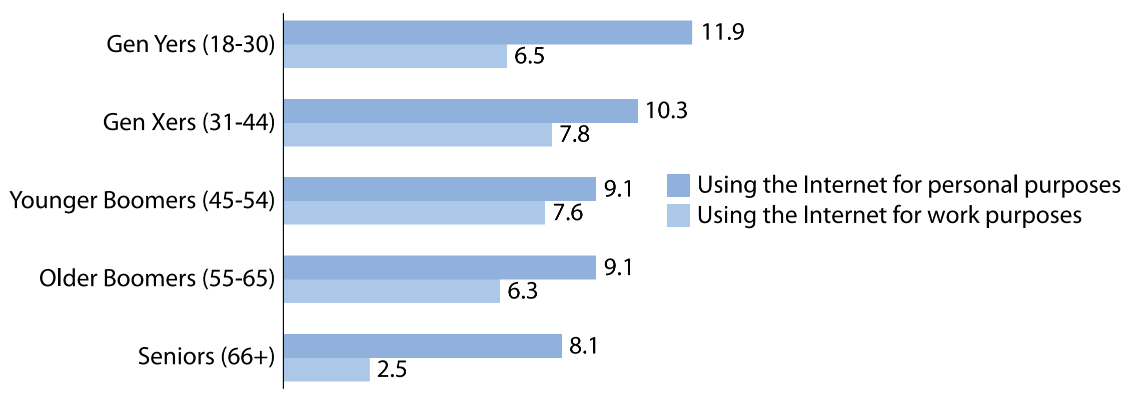


Base: US households

Source: North American Technographics® Benchmark Surveys, 2005 to 2010
*Note: The answer options for the number of hours spent with each type of media were modified in 2008.
†Note: Since 2007, Internet usage was split into "Internet for personal purposes" and "Internet for work purposes." The number shown here represents the sum. In prior years, we asked about Internet usage in a single item.

3-2 Internet usage continues to rise across generations

"In a typical week, how many hours do you spend doing each of the following?"



Source: North American Technographics Benchmark Survey, 2009 (US, Canada)

57861 Source: Forrester Research, Inc.

THE ADOPTION OF ONLINE ACTIVITIES VARIES WIDELY

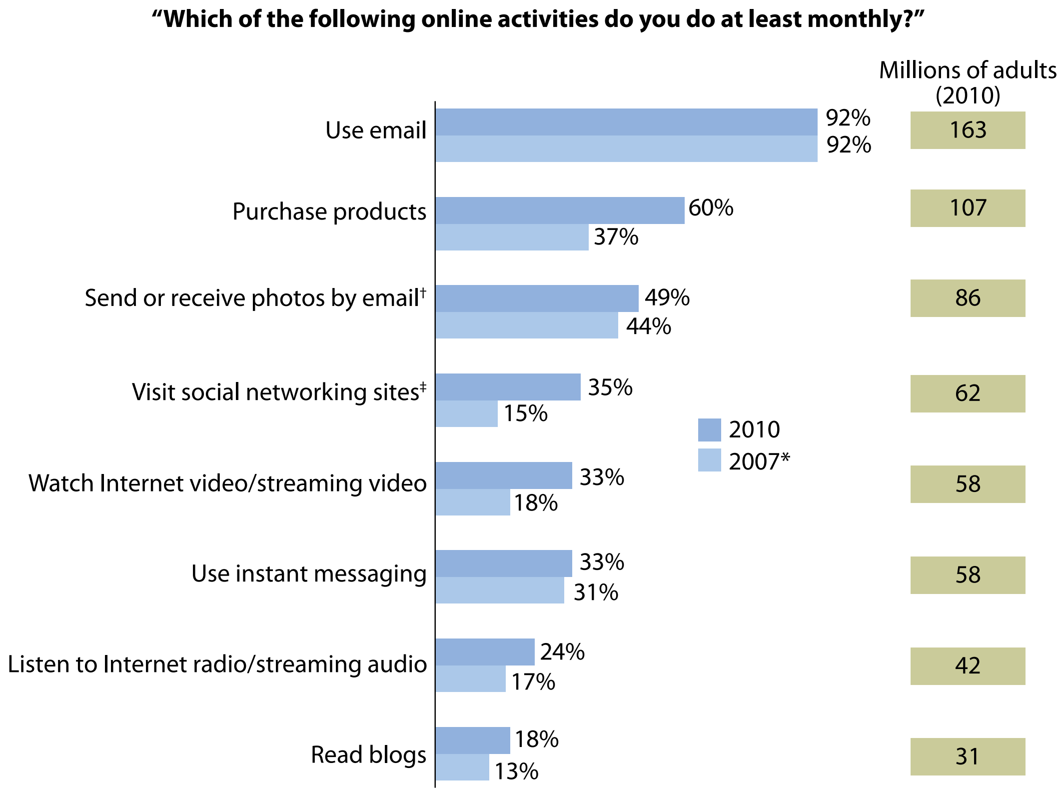
Looking at the adoption of online behaviors over the past three years reveals their varied appeal (see Figure 4). General activities like email are attractive because of their functional integration with consumers' existing lives. Once consumers understood the concept of sending electronic messages, for example, it became easy to substitute traditional letter writing (or even phone calls or in-person meetings) with a quick email, or instant messaging (IM) for the younger generations. Other, more specialized behaviors like blogging are still limited to a distinct group of online consumers. A look across this trend of online behaviors reveals that broad adoption of any behavior is limited to a few activities. For example:

- **eCommerce appeals to the largest online audience.** In 2007, slightly more than one-third of online respondents were shopping online, and in 2010, 60% do so.[6] eCommerce has broad appeal because, like email, it is based on a behavior that consumers are already doing: in this case, shopping. The barriers of moving this offline behavior online are higher than for other replacement activities like email but don't require learning a brand-new behavior. Gen Xers are fueling eCommerce adoption: 68% of them are shopping online. But moving beyond the pure adoption numbers uncovers a more important story for online retailers. Although fewer Boomers are buying online, they outspend Gen Xers by more than $4.5 billion a year.[7] So while there are many Boomers who will never overcome the barriers to buying online, those who do so are worth the attention.

- **Social networking now connects 62 million US adults.** Next to eCommerce, social networking site usage has seen the biggest jump in adoption since 2007. Social networking sites are driving the growth of social technology usage, and although only slightly more than one-third of all US online adults visit social networking sites regularly, the future looms large for this type of social media.[8] Gen Yers are the biggest social networkers, with almost two-thirds reporting that they update or maintain a social networking site profile at least monthly.[9]

- **Other social technologies are rooted in a small consumer base.** Blogging, listening to streaming audio, and even IMing engage only one-third or less of the online US population. While advances in technologies may help bring some additional users to these activities, they speak to a niche group of consumers. IMing, for example, which only added 2% penetration since 2007, is heavily concentrated among Gen Yers. And even listening to streaming radio, another activity led by Gen Yers, is done by less than 40% of them.[10] The reality is these activities will never have the mass appeal of something like email.

Figure 4 Trended Online Activities Show Niche Usage



Base: 29,295 US online adults
*Base: 28,771 US online adults
(multiple responses accepted)

Source: North American Technographics® Benchmark Survey, Q2 2010 (US, Canada)
*Source: North American Technographics Benchmark Survey, 2007
†Asked as two separate questions in 2007
‡Asked as "use social networking sites" in 2007

57861 Source: Forrester Research, Inc.

ADVANCED MOBILE ACTIVITIES CONTINUE TO GAIN GROUND

US adults are now as likely to have a mobile phone as they are to have a PC.[11] The prevalence of mobile phones as well as their portability and accessibility create a perfect storm of possibility for consumers who want to stay connected. The increasing availability of mobile-Internet-capable phones and unlimited data plans translates directly into the possibility for consumers to connect to the Internet through their mobile devices.[12] As consumers expand their online experiences to their mobile phone, understanding their mobile behaviors becomes an important part of understanding the online consumer.

Internet, Media, And Search Lead Advanced Mobile Activities

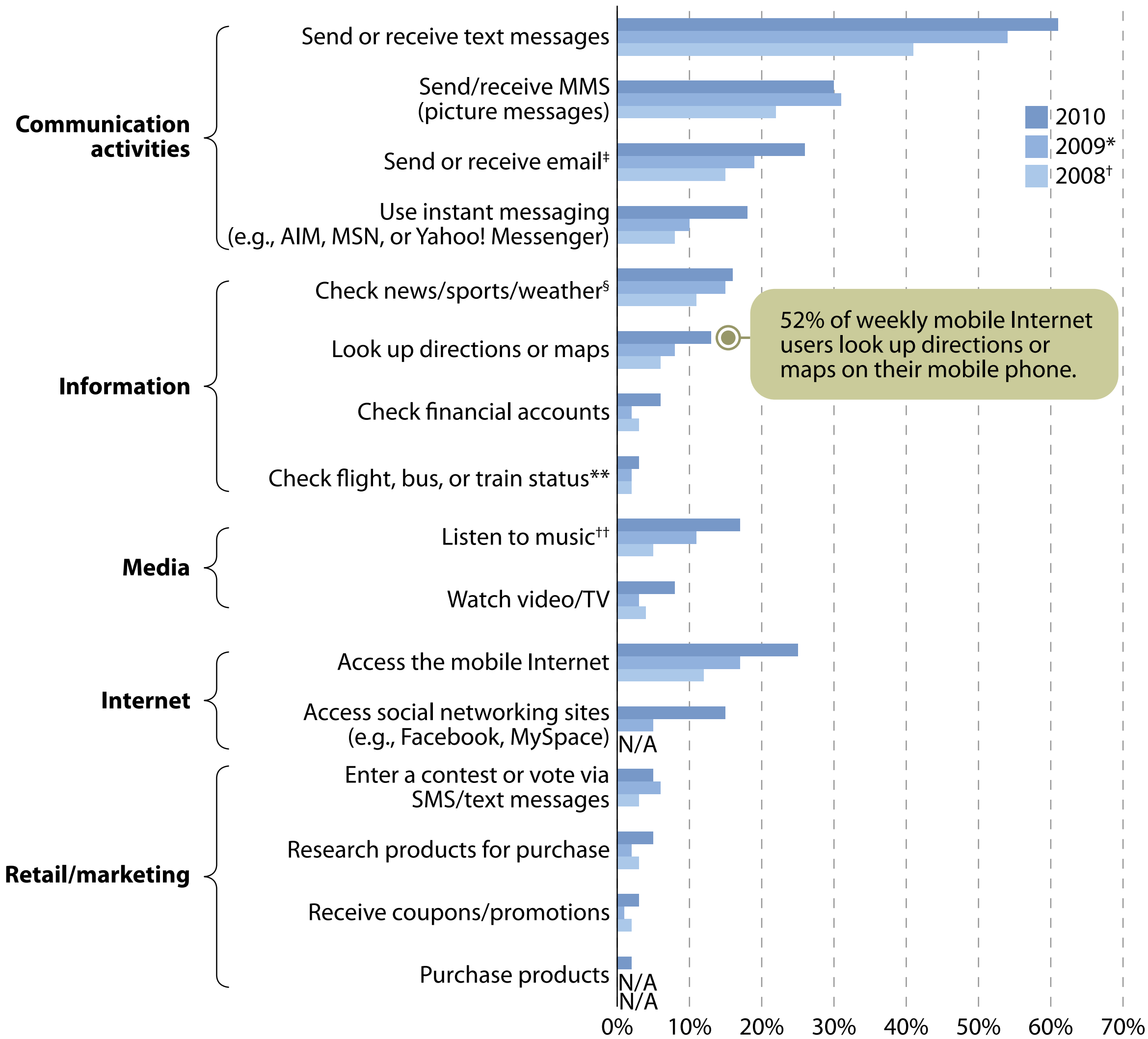
When looking across a variety of trended mobile activities, it's apparent that consumers' usage still centers around communication activities. The percent of mobile users who report texting on a monthly basis jumped from 54% to 61%, with more and more older users making a foray into communicating beyond phone calls alone (see Figure 5).[13] When we look beyond mobile communication activities, we find that:

- **The mobile Internet connects more users.** One-quarter of online mobile owners now log onto the mobile Internet. This big jump in online access is primarily fueled by Gen Yers. More than one-third of these online mobile consumers are connecting at least monthly. While many companies now offer apps, numerous mobile users, especially those without an iPhone, access companies' content through their mobile sites.[14] Social networking sites have proven to be one of the most popular types of sites that users are accessing.[15] According to Facebook, 200 million consumers now access their site through a mobile device globally.[16]

- **Media is migrating to mobile phones.** In 2008, only 5% of online mobile owners were listening to music on their mobile devices. That number has now grown to 17%. And while video and TV viewing is limited to 8% of online mobile consumers, this is still double what it was two years ago. Access to media is much easier with the newest crop of mobile devices, and iPhone owners have the luxury of easily accessing media content easily through iTunes. Ping, a social expansion of iTunes, appeals specifically to the Gen Yers fueling mobile media growth.[17] But non-iPhone owners can also engage with mobile media through sites and applications like YouTube, Pandora, and Grooveshark.

- **Search offers mobile consumers instant information.** Consumers are starting to realize the power available in the palm of their hand. Sixteen percent of online mobile users now use their mobile phone to check news, sports, or weather, and 13% look up directions or maps. When we look specifically at individuals who access the mobile Internet at least weekly, these numbers skyrocket to 60% and 52%, respectively.[18] A recent Nielsen study names Google Search as the top Web site accessed on mobile phones.[19] Marketers are beginning to comprehend the value of these behaviors, as well: Almost one-quarter of US interactive marketers plan to pilot mobile search programs in the next 12 months.[20]

Figure 5 Mobile Activities Continue To Expand



Base: 25,616 online mobile individuals
*Base: 31,991 online mobile individuals
†Base: 33,580 online mobile individuals

Source: North American Technographics® Benchmark Survey, Q2 2010 (US, Canada)
*Base: North American Technographics Benchmark Survey, 2009 (US, Canada)
†Base: North American Technographics Benchmark Survey, 2008
‡In 2010, we asked about personal and work email separately; in 2008 and 2009, we asked as combined.
§In 2008 and 2009, "check weather," "check sports scores/updates," and "read news" were asked as separate items.
**In 2008 and 2009, this was asked just as "check flight status."
††In 2009, this was asked as "play music" and in 2008, "download or stream music."

57861 Source: Forrester Research, Inc.

Mobile Internet Users Have Distinct Profiles

Not all mobile Internet users are created equal, though. The general assumption tends to be that mobile Internet users are just heavy regular Internet users, but that isn't exactly the case. While mobile Internet users do tend to spend more time online (19 hours a week on average) in general, their mobile use centers around specific needs.[21] Upon examining consumers' mobile behaviors, we identified three main types of advanced mobile users (see Figure 6-1):

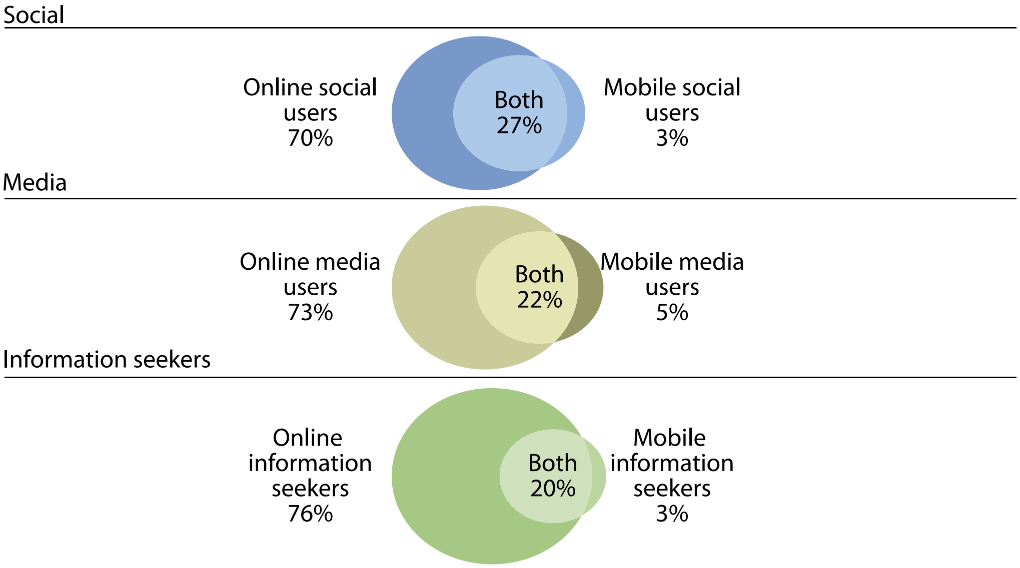
- **Mobile social users need to be connected.** Thirty percent of online mobile consumers classify as mobile social users. These are individuals who are visiting social networks, IMing, or using an application from a social networking site on their mobile phone. The most interesting thing about mobile social users is that they are the most likely to be engaging in these behaviors both online and on their mobile devices.[22] Social behaviors are more than mere activities; they are a way of life for these consumers. Whether at home in front of the computer or out and about on their mobile phones, these consumers want to be connected to their friends.

- **Mobile media users crave entertainment.** These mobile users are playing games, listening to music, watching TV or videos, or using media apps (game, music, TV, or video). Cutting-edge entertainment is important to this type of mobile user. Almost one-third agree with the statement "I am constantly looking for new ways to entertain myself." Most media use still centers around gaming and audio (59% play games weekly and 50% listen to music weekly, while one-fourth watch TV or video weekly) but as video capabilities continue to expand on the mobile channel, these users will be the first to clamor for any new source of entertainment.

- **Mobile information users seek knowledge.** Mobile information seekers are in a league of their own; the other two groups are less likely to also classify as mobile information seekers (see Figure 6-2). The mobile behaviors of these consumers center around accessing the most up-to-date information, whether it's checking fantasy sports scores on Yahoo! or the latest world news on CNN.com. These mobile users are the most likely to be male and college-educated, and their average household income is more than $92,000 (see Figure 6-3). These wealthy, educated consumers are also highly career-focused.[23] Being able to find an answer to whatever question they have drives these consumers to log in on the go.

Figure 6 Advanced Mobile Users Center Usage Around Media, Social, And Search

6-1 Online users turn to mobile for distinct needs



Base: 25,616 online mobile phone owners

6-2 Mobile info seekers are the most active advanced mobile users

	Mobile social users	Mobile media users	Mobile information seekers
Mobile social users	100%	78%	76%
Mobile media users	78%	100%	78%
Mobile information seekers	68%	70%	100%

Base: 25,616 online mobile phone owners

6-3 Mobile media, social, and search users differ

	Male	Age	College degree	HH income (US$)	Hours online per week	Use mobile Internet monthly
Total online mobile owners	48%	43	36%	$79,924	16.4	25%
Online social users	45%	38	38%	$78,368	18.6	34%
Online media users	48%	41	36%	$78,064	18.2	29%
Online information seekers	52%	43	42%	$83,705	17.8	28%
Mobile social users	50%	35	42%	$85,265	19.3	100%
Mobile media users	54%	35	41%	$85,432	19.2	100%
Mobile information seekers	57%	37	49%	$92,096	19.7	100%

Base: 25,616 online mobile phone owners

Source: North American Technographics® Benchmark Survey, Q2 2010 (US, Canada)

57861 Source: Forrester Research, Inc.

WHAT IT MEANS

THE KEY TO DECIPHERING CONSUMERS' ONLINE BEHAVIORS IS TO LOOK TO THE FUTURE

As the average time consumers spend logged on to the Internet continues to increase, the Net is one of the leading channels for reaching consumers. Both Gen Xers and Gen Yers now spend more time online than they do watching offline TV. Since most companies have at least a basic Internet presence, the next step is to understand the future of consumers' Internet experience. As market research professionals, you need to:

- **Discover how to expand current online consumer behaviors.** Many online behaviors speak to a very specific group of consumers, with growth slowing compared with earlier years. These specialized behaviors, like creating media content, writing ratings and reviews, and blogging, saw initial growth from early consumers naturally attracted to those behaviors. Now that the initial adopters are accounted for, growth will slow considerably until other consumers are lured in by advances in technology or new benefits. In the meantime, the focus should be on keeping current users engaged. Which consumers are leaving reviews of products on your Web site? What would they need to make the process easier or more interesting? What would make them more likely to leave comments again? Answers to these types of questions will help you embed your company deeper with current users while also developing a better experience for future users.
- **Monitor and understand Gen Y behaviors.** Gen Yers act as a crystal ball for the future of Internet and mobile behaviors. These consumers are at the forefront of adopting behaviors (as long as they don't hold a high entry fee). Understanding not only what they're doing but also why will help create long-term strategies that will help prepare your company for its future. For example, you may think knowing that 67% of online Gen Yers maintain a social networking profile isn't important if you're a financial services company focused on helping Boomers with retirement plans. By the time Gen Yers are in your target market, Facebook may be a thing of the past, right? This may be true, but the sociological factors driving Gen Yers to use these social sites are important and will help you understand what they'll expect from you when they're ready to retire.
- **Track mobile behaviors.** Consumers' Internet experience no longer ends when they step away from their PC. As consumers increasingly turn to their mobile phones to connect to the Net, tracking their mobile behaviors becomes more critical. Forrester developed the Mobile Technographics classification system to help understand the levels at which consumers are engaging with their mobile devices.[24] Understanding if your target users are basic users simply calling home in an emergency or advanced users streaming last night's TV show they missed will allow you to guide key stakeholders to the appropriate mobile strategy. Whether it's Forrester's profiling tool or data you've collected, examining your target's mobile usage will uncover their unique profile. If your consumers do prove to be active mobile Net users, then tracking cross-device Web use with services like comScore's MobiLens becomes an integral part of the research mix.

SUPPLEMENTAL MATERIAL

Methodology

Forrester fielded the North American Technographics Benchmark Survey, 2010 (US, Canada) in February and March 2010 to 42,792 US and Canadian households and individuals ages 18 and older. For results based on a randomly chosen sample of this size (N = 42,792), there is 95% confidence that the results have a statistical precision of plus or minus 0.5% of what they would be if the entire population of North American households and individuals ages 18 and older had been surveyed. Forrester weighted the US head of household data by age, gender, household income, household size and composition, education level, region, and market size (combined statistical area). The weighting criteria for the US individual respondent data included all of the above with the addition of employment status. The survey sample size, when weighted, was 34,866 North American respondents at the household level and 42,785 North American respondents at the individual level. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in mail panels.) The sample was drawn from members of TNS's panel, and respondents were motivated by a sweepstakes drawing. The sample provided by TNS is not a random sample. While individuals may have been randomly sampled from TNS's panel for this particular survey, they have previously chosen to take part in the TNS panel.

You can find more information about the data on the Survey & Data page online. From this page, you will be able to download the Survey Instrument.

For more information on Forrester's ForecastView offering, including access to additional details and metrics not included in this report, please contact us at data@forrester.com.

For Technographics Clients

Forrester's North American Technographics Benchmark Survey, 2010 (US, Canada) of 42,792 US and Canadian households and individuals ages 18 and older includes many additional parameters by which you can analyze the data contained in this report. Please contact your data advisor at consumerdataadvisor@forrester.com if you would like to see the data cut by:

- **Demographics.** Age, gender, household size, geographic location, education, income, financial assets, employment status, and marital status.

- **Behaviors.** Online behaviors, media usage, social media usage, technology ownership, telecommunications services, and consumer behaviors in the automotive, financial services, healthcare, marketing, retail, and travel realms.

- **Brands.** Investment firms, banking firms, insurance firms, TV channels, magazines, newspapers, TV set manufacturers, TV service providers, landline and wireless phone service providers, cell phone manufacturers, PC manufacturers, operating systems, ISPs, search engines, Web sites, retailers, vehicle manufacturers, prescription drugs, and health insurers.

- **Attitudes.** Technology attitudes; proprietary Technographics segments; Social Technographics Profiles; Mobile Technographics Profiles; and consumer attitudes about shopping, travel, financial services, healthcare, etc.

If you do not currently subscribe to Forrester's Consumer Technographics services, please contact your account manager at data@forrester.com.

ENDNOTES

1 For more on Technographics, see http://www.forrester.com/rb/data/consumertechno.jsp?cm_re=Navigation_010710-_-consumer_data_subnav-_-consumer_technographics.

2 It is important to note that the data reported throughout this document is self-reported data. That is, we ask consumers how often they do various activities online and are reliant upon their ability to answer this. Figures represented here will likely vary from any data that is pulled from Web-traffic-tracking statistics, and therefore the two should not be compared directly.

3 Forrester defines online consumers as those who are online at least monthly.

4 There is still a small portion of the population using dial-up: 7%, according to the North American Technographics Benchmark Survey, Q2, 2010 (US, Canada). However, these individuals tend to be older consumers who aren't as engaged online to begin with.

5 Gen X heads of household report an average of 12 hours watching TV not online and 17 hours online, while Younger Boomers clock almost 14 hours with the TV and the same with the Internet. Source: North American Technographics Benchmark Survey, Q2 2010 (US, Canada).

6 We define shopping online as having made a purchase online in the past three months.

7 According to data collected in our North American Technographics Benchmark Survey, Q2 2010 (US, Canada), online-buying Gen Xers spent an average of $582 over a three-month period, while Younger Boomers averaged $648 and Older Boomers $642.

8 For more on social media growth, see the September 28, 2010, "A Global Update of Social Technographics®" report.

9 Source: North American Technographics Benchmark Survey, Q2 2010 (US, Canada).

10 Source: North American Technographics Benchmark Survey, Q2 2010 (US, Canada).

11 Eight-two percent of US adults report having a mobile phone, the same percentage that report having any type of PC. For more on device penetration in the household, see the September 21, 2010, "The State Of Consumers And Technology: Benchmark 2010, US" report.

12 Forrester reports that only 3% of active US mobile phones are now "voice-only" phones. On the flip side, nearly one-third of phones are 3G-capable. For more on the future of the US mobile market, see the November 6, 2009, "US Mobile Forecast, 2009 To 2014" report.

[13] More than half of mobile-owning online Younger Boomers and one-third of mobile-owning online Older Boomers now text at least monthly. Source: North American Technographics Benchmark Survey, Q2 2010 (US, Canada).

[14] For more on deciding whether a mobile site or an app is the right option for your company, see the April 9, 2009, "The POST Method: A Systematic Approach To Mobile Strategy" report.

[15] Source: "How Americans Spend Mobile Internet Time: A New Look," *Nielsen Wire,* September 3, 2010 (http://blog.nielsen.com/nielsenwire/online_mobile/how-americans-spend-mobile-internet-time-a-new-look/).

[16] For the most recent Facebook stats, see the press page at http://www.facebook.com/press/info.php?statistics.

[17] Slightly less than one-third of online mobile Gen Yers listen to music monthly, and 15% watch video or TV. Ping allows users to follow friends to keep in touch with what they're listening to and buying as well as follow favorite artists. See http://www.apple.com/iphone/features/itunes-store.html.

[18] Source: North American Technographics Benchmark Survey, Q2 2010 (US, Canada).

[19] Google Search was named as the most accessed Web site on mobile phones from January to September 2009, according to a Nielsen study. Source: "Top Mobile Phones, Sites and Brands for 2009," *Nielsen Wire*, December 21, 2009 (http://blog.nielsen.com/nielsenwire/online_mobile/top-mobile-phones-sites-and-brands-for-2009/).

[20] Source: May 2010 US Interactive Marketing Online Survey.

[21] Source: North American Technographics Benchmark Survey, Q2 2010 (US, Canada).

[22] To understand the similarities and differences among these groups' online and mobile Internet behaviors, we compared similar activities being done on both media. This allowed us to see what the overlap in usage was.

[23] Forty percent of mobile information seekers were classified as career-driven according to Forrester's classification system for determining consumers' motivations for adopting and using technology. Consumers are classified as career-, family-, or entertainment-driven. Slightly more than one-quarter of all US mobile owners classify as career-driven.

[24] For more on the Mobile Technographics classification system, see the September 28, 2010, "US Mobile Technographics: 2010" report.

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Making Leaders Successful Every Day

Headquarters

Forrester Research, Inc.
400 Technology Square
Cambridge, MA 02139 USA
Tel: +1 617.613.6000
Fax: +1 617.613.5000
Email: forrester@forrester.com
Nasdaq symbol: FORR
www.forrester.com

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