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June/July 1997

Quirk's MARKETING RESEARCH Review

Practical applications in marketing research

Special focus: On-line research

- Case histories on Yahoo! and American Century mutual funds
- Technique articles on qualitative and quantitative Web research

1997 Directory of Omnibus Studies

Quirk's
MARKETING RESEARCH
Review

C O N T E N T S

Volume XI, Number 6 June/July 1997

Our first Internet research issue features a wide range of stories on this fast-growing and promising research approach.

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Sports brands battle for national recognition

The top sports brands generate powerful images in the national consciousness, with Fruit-of-the-Loom, Nike, Reebok and Hanes enjoying nearly unanimous recognition in the public mind. These were among the findings of a recently completed study of 186 sports brands conducted by American Sports Data, Inc., Hartsdale, N.Y.

Of the top 20 brands registering the highest gains in national awareness from 1993 to 1996, seven were vendors of outdoors products and apparel. Teva, the leading sports sandal manufacturer, more than doubled its awareness during the three-year period with a gain of 119 percent. Other outdoors brands sporting sizable increases in national recognition were Eastpak (+48 percent), Jansport (+46 percent), Timberland (+43 percent), Eddie Bauer (+38 percent), Kelty (+37 percent), Patagonia (+30 percent) and R.E.I. (29 percent).

At the other end of the spectrum, emblematic of changing values which have influenced sports preferences, are the declines in the so-called blood sports of hunting and fishing. Three-year erosion in brand awareness was evident for Colt (-12 percent), Browning (-12 percent), Ruger (-16 percent), Abu-Garcia (-21 percent), Berkley (-18 percent) and Zebco (-16 percent).

Fitness equipment companies, with only a few exceptions, capture a very small share-of-mind. "In general, brand awareness is related to how long a brand has been around, and to how many people have ever purchased it," says Harvey Lauer, American Sports Data president. "So in the case of big-ticket items like exercise machines, where unit sales by individual brands will number 'only' in the thousands, awareness will be a lot lower than for smaller items like athletic shoes, which can permeate the entire population.

"The exceptions here are brands with a strong TV or direct marketing presence. NordicTrack ranks seventh out of 186 brands with a national recognition of 87 percent. Soloflex, a much smaller brand but a long-time fixture of cable television, enjoys a brand awareness rating of 54 percent. By contrast, Life Fitness — a $200 million brand — is

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Shop 'til you drop?

Thirty-four percent of Americans say they are shopping at malls less frequently than one year ago, according to a recent Maritz AmeriPoll. The new study confirms a trend uncovered by an identical AmeriPoll study in 1994.

Also in tandem with the 1994 poll, women today are turning away from malls at a higher rate than men. Thirty-nine percent of women are shopping at malls less frequently compared to 27 percent of men.

The top three reasons people are shopping less frequently at malls are: it's too expensive (18 percent), they don't need to buy/shop as much as they used to (9 percent), and they don't have enough time to shop at malls (8 percent).

However, when they do shop at malls, Americans say crowding is the number one drawback (31 percent). More men find the crowds displeasing than women. Thirty-six percent of men cited this as the biggest drawback to shopping at malls compared to 26 percent of women. Surprisingly, 42 percent of 18-24-year-olds said crowds are the biggest drawback to shopping at malls compared to 29 percent of those 25 and up.

While many people are using malls less, 11 percent say they are going more frequently, and over half (55 percent) are using them about the same. Among those who are shopping more frequently, better selections/more variety is the most common reason (15 percent). Convenience and increased income were both cited by 12 percent as the next most common reasons for shopping more frequently at malls.

However, the average number of trips people make to the mall each month has dropped from 2.6 in 1994 to 1.97 today. Moreover, 22 percent of Americans spend less than one hour at the mall per visit. Men are nearly twice as likely to get in and out of the mall at lightning speed, as 29 percent claim their average trip lasts less than one hour. Fifteen percent of women make the same claim. Overall, 76 percent of Americans spend less than two hours per trip, 19 percent spend three to four hours, and only 5 percent spend five or more hours per trip when shopping at malls.

Maritz AmeriPoll is a national consumer opinion poll conducted regularly by Maritz Marketing Research Inc., St. Louis. Results are based on telephone interviews with American adults. Accuracy of the results is ±3.09 percent. For more information call 800-446-1690.

Product & Service Update

ASW and CyberGold debut research services for Internet advertisers

Audits & Surveys Worldwide (ASW), New York, has entered into a strategic alliance with CyberGold, Inc., to provide Internet advertisers with marketing research services. Internet advertisers can now learn whether their target audience responds to their message and develop a profile of those who do and do not respond. Using CyberGold's Web marketing system, ASW will be able to sample consumers with specific characteristics which more precisely target an Internet advertiser's audience. ASW expects to enhance Internet survey participation rates through the use of CyberGold online incentives. ASW will also provide CyberGold advertisers with independent verification of Internet ad image, message retention, audience demographics and purchase intentions. CyberGold has developed a "pay for performance" system that enables marketers to attract and reward consumers who respond to surveys, advertisements, purchase/rebate offers, loyalty programs, registration drives and other marketing campaigns on any Web site. CyberGold's software handles reward fulfillment and tracking, charging marketers only when consumers complete the requirements for each offer. For more information call Jack Richman at 212-627-9700 ext. 880.

E-QUEST tells why people visit a Web site

Elrick & Lavidge, Atlanta, has introduced E-QUEST, a new line of Internet research services designed to tell marketers why people visit their site. Results can be posted almost instantaneously and made available via E-mail or posted on secure pages that only clients can use. E-QUEST can act as a stand-alone service or can be combined in any number of ways with the company's traditional marketing research services. The E-

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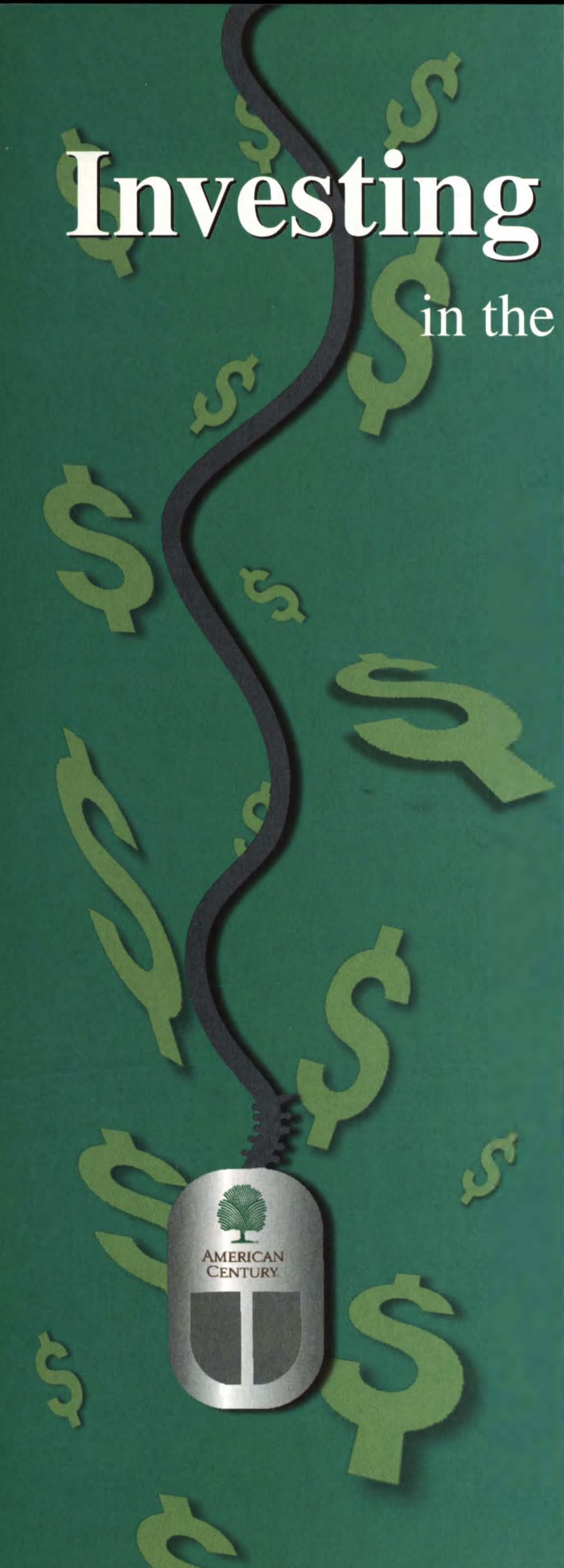
Research Calendar

INTELLIQUEST BRAND FORUM: The fifth annual IntelliQuest Brand Tech Forum will be held September 29-30 at the Sheraton Park Place Hotel in San Francisco. The forum explores the latest issues in creating, managing and measuring technology brands. The 1997 forum will focus on customer relationship building and the management of brands in the interactive age. Speakers include Bob Herbold, executive vice president and COO, Microsoft Corp.; Walter Mossberg, personal technology columnist, *The Wall Street Journal*; Jim Taylor, senior vice president of global marketing, Gateway 2000; and Scott Adams, creator of the Dilbert cartoon. For more information on fees call 800-543-6124 or visit the IntelliQuest Web site at www.intelliquest.com.



Investing in the Internet

AMERICAN
CENTURY

Research tells American Century what investors want in a mutual fund Web site

As the Age of the Individual Investor rolls on, fueled by a seemingly bulletproof economy and fears that Social Security is now a misnomer, money keeps pouring into mutual funds. To monitor their portfolios and seek out other investment vehicles, many mutual fund shareholders — especially fans of no-load funds, who tend to be a self-sufficient lot — are turning to the Internet.

Mutual fund companies have been quick to pick up on this, adding a host of services to their Web sites, from on-line prospectuses to portfolio tracking. But will the mutual fund companies see a payoff from their investment in on-line information provision?

Having launched its own Web site in August 1996, American Century Investments, a Kansas City, Mo., mutual fund company (which includes the Twentieth Century Group, American Century Group and Benham Group of mutual funds), conducted the Investor Internet Adoption Study in the fall of 1996. The objectives of the study were to:

• gauge mutual fund investor access to the Internet and on-line services;

• understand mutual fund Web site usage;

• identify desired mutual fund services on the Internet;

• capture concerns related to Internet investment activity.

Portrait of an individual investor

Based on findings from the American Century study, here is a snapshot of mutual fund owners who browse the Internet:

- Sixty-four percent are male and 36 percent are female
- Fifty-four percent are under age 40
- Seventy-six percent are college graduates
- Seventy percent are married and 51 percent have children living at home
- Seventy-six percent consider themselves long-term investors
- Seventy-two percent access the Web from home, 66 percent from work and 38 percent from both
- They spend 10 hours monthly (median) on the Internet
- They most frequently visit research (19 percent), news (11 percent), sports (7 percent), entertainment (6 percent) and financial sites (6 percent)
- Of those who own a home computer, 35 percent are powered by a Pentium chip, 30 percent are 486s and 10 percent are Apples
- Only 46 percent have home modems 28.8 baud or faster
- More than half (52 percent) have 16 MB or more of RAM in their home computer
- Nearly half (48 percent) have adopted the Windows 95 operating system
- Nearly everyone with a home computer is equipped with a CD-ROM (87 percent), a printer (93 percent), and a modem (96 percent)
- The most common types of software owned: word processing (97 percent), games (91 percent), spreadsheet (88 percent) and financial (77 percent)
- The most commonly owned software packages: Microsoft Word (75 percent), Quicken (66 percent), Excel (62 percent), WordPerfect (54 percent) and PowerPoint (45 percent)

With the help of Elrick and Lavidge, an Atlanta-based research firm, American Century contacted almost 1,400 mutual fund owners by telephone to identify 250 respondents (18 percent) who currently access the Internet. "We wanted to get an idea of how quickly the technology was being adopted by investors," says Angela Murray, senior marketing research analyst, American Century Investments. "Beyond that, what types of things are they doing on-line? Are they making transactions? Are they interested in having account access on the Internet?"

"All of this information was used to design a Web site that was customer-centered. Knowing our customers enables us to focus our efforts," adds Karen Seratti, senior marketing research analyst, American Century Investments, who, along with Elrick and Lavidge Account Director Elizabeth Oldweiler, also worked on the project.

The study found that mutual fund investors are in the early stages of discovering and using mutual fund Web sites. The most frequently mentioned reasons for using the Internet are for research/information or E-mail. Financial services ranks fifth at 32 percent of respondents. This is comparable to the 28 percent who reported having ever visited a mutual fund Web site.

Reasons for Using the Internet	
Research/Information	79 %
E-Mail	60 %
Entertainment	45 %
News	43 %
Financial Services	32 %
Bulletin Boards	28 %

While the research suggests that fund investors have been slow to embrace the Internet, American Century found that its Twentieth Century Group shareholders are much more comfortable with Web-based services. The Twentieth Century Group includes aggressive equity funds usually favored by younger investors, whose longer time horizons allow them to ride out aggressive funds' ups and downs. "We do tend to have a younger shareholder base and they're the same people who are seeking out the cutting-edge technologies," Murray says.

"We acknowledged that our shareholders are the early adopters of technology. The more we understand them, the more we're ahead of the technology curve," Seratti says.

Compared to the general investing population, more than half of Twentieth Century investors (51 percent) use the Internet for financial services purposes. And although only 18 percent of mutual fund investors access the Web, 33 percent of the Twentieth Century fund group investors do so.

Can do vs. want to do

The research suggests that there is still a large gap between what investors can do and what they want to do on the Internet. The most common actions taken at a mutual fund Web site are checking fund share prices and reading/downloading prospectuses. Other Web site activities occur at much lower rates. In fact, 13 percent of investors who have visited a fund site have done so to check account balances, an action not readily available on many fund Web sites.

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Search no further

On-line research is logical choice for Yahoo!'s audience analysis project

By Richard Kottler

Editor's note: Richard Kottler is new product director with Quantime Corp., a New York-based provider of survey research software and support services.

The advantages and disadvantages of using the World Wide Web to conduct survey research have been debated ever since the Web became acknowledged as a viable business tool. While speculation continues and skeptics abound, panels of Internet-connected respondents are growing throughout the U.S., and the marketing value of the data collected is increasing. Many researchers are discovering firsthand the realities, opportunities and challenges of Web-based research.

The additional challenge of ensuring that the technology used to collect data on the Web is the most appropriate for the medium and its users falls to marketing research software providers such as ourselves. The past year has proved a learning experience for both Quantime and our customers in this regard. We find the results encouraging.

The roots of Web-based survey technologies

Remember that the Internet is more than the Web. The Internet, dubbed the Information Superhighway just a few short years ago, can be thought of as the network which carries the information. Our firm has been using the Internet since 1982 for file transfer, for E-mail and for getting information via news groups and the like. However, in the same way that it took a reliable and graphical interface like Windows Version 3 to bring computers out of the domain of data processing specialists and on to the desktops of all, so the World Wide Web — again a graphical and very easy to use interface — has brought the Internet to the masses.

The development of the Internet and the Web laid the foundation for Web-based marketing research. The challenge for marketing research software developers was to adapt our existing software used for computerized interviewing (CATI and CAPI) to this medium. The final test was to implement this new technology in a real-world situation. This opportunity was brought to us through one of our customers, U.K.-based Continental Research, in partnership with Yahoo!

Yahoo! A case study

Yahoo! Inc. is an Internet media company that offers a network of globally-branded properties, specialized programming, and aggregated content distributed primarily on the Web, serving business professionals and consumers. As the first on-line navigational guide to the Web, www.yahoo.com is the single largest guide in terms of traffic, advertising and household reach, and is one of the most recognized brands associated with the Internet.

For Yahoo! the Web was an obvious means of surveying customers. As an electronic medium, the company was already in a position to supply exact traffic figures to companies advertising with it. But as a sales-driven business model, its ideal was to empower its advertisers with more accurate statistics

as to who is visiting Yahoo!'s sites, and provide detailed profiles of the individuals who actually make up its audience.

Yahoo!'s European sites welcomed 70 advertisers during the first quarter of 1997, and Yahoo! Inc. recently announced that IBM Corporation, one of the top three Web advertisers, has selected the Yahoo! Network to launch the world's first global multilingual Internet advertising program. Other major advertisers with Yahoo! include British Airways, Opal, Nescafé, Peugeot and Karstadt. This therefore underlines the measurement of Yahoo!'s audience as important for growth of its industry and advertising on the Internet.

The challenge

Last year, Yahoo! requested marketing research companies to submit a proposal for the analysis of basic demographics of business and consumer users of their sites in Germany, France and the U.K. The objective of the study was to measure motivation of usage and point of primary Internet access. Yahoo! commissioned the U.K.-based agency, Continental Research, customers of Quantime since 1989. Although specialists in the field of advertising research, collecting data on the Web was a new concept to Continental. Continental's James Burckhardt was aware Quantime was developing a product dedicated to Web research and asked us to come on board.

So earlier this year, we joined forces with Continental and together devised a two-stage program designed to provide Yahoo!'s advertisers with audience qualification figures. Stage one was fielded between April 1st and April 15th. The purpose was to analyze the basic demographic profile of business and consumer users visiting Yahoo! France, Germany, and U.K. and Ireland and to measure motivation for usage and point of primary Internet access. It was essential to Yahoo! that the survey and any direct correspondence was carried out in the respondent's own language.

Respondents were also asked to supply their E-mail address for re-contact at stage two, which was to be a much more in-depth survey. Our primary methodological considerations at this stage were recruiting respondents to participate in the survey, persuading them to complete it and then ensuring that we were getting the best information we could. The fact that stage one of the survey attracted over 10,000 completed responses from the three countries in just over two weeks is an excellent sign that our objectives were being met.

Collecting the data

The first of the Yahoo! surveys consisted of 10 questions which probed respondents about their media preferences, education, age and expenditure patterns. Our major design objective in developing the Web software used in the Yahoo! survey was to maintain compatibility with our existing CATI and CAPI package, Quancept. Since the same scripting language is used, our Web surveys can now have exactly the same logic as CAPI or CATI surveys. Complex routing and randomization procedures can be built into the text, ensuring the data collected is consistent. Furthermore, the answers to previous questions can be used in the text of subsequent questions — customizing the survey for each respondent and encouraging their cooperation.

Most HTML surveys typically do not check for missing responses, and the most sophisticated of those that do often present the whole survey once again for completion. Since the majority of Web surveys remain standard HTML forms, they have the same limitations as paper questionnaires. Simple to complete, they tend not to have any complex routing and are quite short.

We believe the Web is about interactivity, adapting the questionnaire to the respondent as he completes it. This approach provides control in guiding the respondent to complete the survey completely and consistently.

An argument against this method is that viewing and answering a Web survey page by page could be slow, depending on the speed of the connection and Internet traffic. To lessen this in the Yahoo! survey, we presented questions that did not require routing on a single screen to minimize the time required to complete the survey.

Despite such tricks, we still found that around 10 percent of respondents who started the questionnaire failed to complete all the questions. There could be any number of reasons for this (boredom, connection problems, impatience), but since the cost of these lost interviews was close to nothing, it made little difference. In stage two, where we requested that the respondent sign-in

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Neural networks pt. III: Using the past to forecast the future

By Mike Fassino

Editor's note: Mike Fassino is president of EnVision Knowledge Products, Media, Pa. This is the final installment of a three-part series on neural networks. The first part, "Understanding back-propagation" appeared in the April issue of QMRR. Part two, "Unsupervised learning neural nets," appeared in the May issue.

The third and final installment in our series on neural networks in market research deals specifically with forecasting the future from knowledge of the past. The first article described some of the basics of neural networks, like back-propagation of errors to create a mapping from input to output and the use of hidden processing units to fit highly non-linear relationships between the inputs and outputs. The neural networks described in the first article, known as supervised learning networks, can be used in contexts of conjoint analysis, discrete choice, customer satisfaction studies and in any condition where one would use regression or discriminant analysis or the various forms of CHAID and logistic regression.

The second article addressed unsupervised learning neural networks that can be used in segmentation and perceptual mapping contexts and in any condition where one would use cluster analysis, factor analysis, multidimensional scaling or latent class analysis. Our focus in the third article is specifically on time series forecasting and methods that supplement ARIMA and regression models. In these models, the explicit goal is to predict the future based on properties of the past. The techniques described are appropriate for sales forecasting, inventory management, demand management, price-elasticity of demand modeling, econometric modeling, advertising impact and advertising allocation, industry structure analysis and any context in which one has sampled one or more variables at consistent intervals of time and wishes to predict the most likely value of the variable at future points in time.

In time series forecasting with neural networks, one typically has two or more networks yoked together and, as I will illustrate, a great deal of time is spent preprocessing the data.

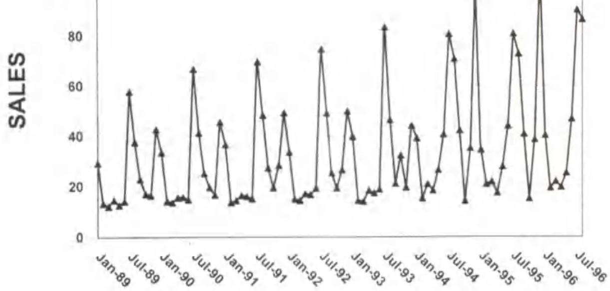
To keep the discussion from becoming abstract, I will use a single example where the goal is to generate accurate sales forecasts four months into the future and to assess the relationship between sales and specific indicators of general economic health.

The data

In this case we have 72 periods of data with which to work. If the series is based on monthly data, it would represent six years of monthly data. If it were a quarterly series, it would represent 18 quarters, or 4.5 years. The time unit really doesn't matter that much — it could be 72 days of sales or, as is common in financial models of the stock market, it could be 72 minutes of trading volume for some particular stock, bond or futures contract. All that matters is that the series is sampled at equal intervals of time. For the sake of this discussion, we will say that the data is monthly, so we have six years of monthly data as shown in Figure 1.

FIGURE 1: THE SERIES

(Six Years of Monthly Sales Data)



This is a very difficult series to forecast because it is non-stationary. That is, the mean increases over time. It also has a seasonality that changes over time. Early in the series, peaks occur in July; later in the series, peaks occur in December. In short, the structure of the series changes over time, perhaps due to advertising, marketing or competitive activity.

The goal, as mentioned, is to predict the next four periods in the series. The traditional approach to this problem is to use a type of regression analysis called ARIMA models. ARIMA stands for "autoregressive integrated moving average" models. ARIMA models view future values of a series as arising from two components:

- past values of the series, the AR component;
- a moving average of previous errors of prediction (referred to as shocks), the MA component.

In the world of ARIMA models, the best prediction of a point in the future is built up from past values of the series and how far off our forecast of past values was. ARIMA modeling is still very much an art superimposed on a science. The analyst must determine how far back in the past the AR component extends. Are July 1997 sales influenced by June 1997 sales, by July 1996 sales, or by sales in January through March? Similarly, are recent errors more important than errors long ago? Is there seasonality, and is this seasonality constant over time?

Typically, one inspects a variety of graphs that show various forms of correlations to answer these questions. One then comes up with a pretty good guess about the lag length of the AR and MA terms, runs the ARIMA using these guesses, calculates prediction errors, adjusts the AR and MA terms and tries again . . . and again . . . and again.

There are well-established conventions about what various parameters will look like when you have a good ARIMA model, and one keeps trying, tuning and testing until these conventions are reached. It takes a lot of practice, experience, time and patience to generate a really good ARIMA forecast. In recent years, software has evolved that uses expert systems to do a lot of the initial model identification, but even with the best of this software (and the best is PC-EXPERT from Scientific Computing Associates), taking the model the last few steps so that it makes forecasts with very small confidence intervals is, to say the very least, onerous.

If nothing else, the neural network approach to time series analysis is easier than ARIMA and, when done correctly, the forecast will be just as precise.

The basic strategy for harnessing neural networks to make time series forecasts is shown in Figure 2. I will describe and illustrate each of the steps with our 72 periods of sales data.

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War Stories

True-life tales in marketing research

By Art Shulman

Editor's note: "War Stories" is a regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches.

Some years ago I conducted in-depth interviews with frequent fliers for my client, a major airline. Respondents were shown some literature the airline was considering using to describe itself, and asked their opinions of it.

A few days after my report was issued, the airline's director of research called me, and said he had a little problem. He'd just received a memo from the cost-conscious airline president, with a letter attached from one of our respondents, who wrote the president, "I like your airline so much that I would have come in to do the interview for free, had I known you sponsored it."

"Why," the president sternly asked the director of research, "are we paying these people when they would do it for nothing?"

Some more reasons shoppers have given for not completing their shops, as reported by Susan Meyer, whose company, National Shopping Service, performs mystery shopping:

• "My husband died last week, my son died this week, and my daughter just got put in the hospital. I completely forgot about the report."

• "My husband beat me up, I moved back to my parents, and I just found out I'm pregnant. Can I call you later?"

• "I'm in labor right now, and I just called to tell you I will not be able to do my shop."

• "It was dark outside."

• "A telephone pole fell in front of my driveway, so I can't get out to do the shop."

• "There's seven feet of snow outside."

Sometimes, Meyer has to contact mystery shoppers who haven't turned in reports, and reaches a relative instead. Here's what some of them have said:

1. (Relative) "Oh, he passed away."

2. (Husband) "She left me . . . I don't think she did it."

3. (Relative) "Oh, he moved to Australia for a mission last week."

Karen Hendersin reports that her company, Quality Education Data, maintains a database of all schools in the country, from which it collects information. One of the questions refers to Internet use. When one respondent was asked to rate her school's use of the Internet she rated it "zero" and stated that their school was "still at the rest stop of the information highway."

Market researchers work hard, often stripping themselves bare for their clients. But there is a limit. Margaret Roller of Roller Marketing Research tells about a group she was moderating with men, where the room was very stuffy. After Roller commented on the stuffy room, and one of the men seriously suggested, "Take your blouse off."

Roller declined.

Ricardo Lopez of Qualitative Video once heard a woman say that she tried for days to fax a hard copy of a one-page document via her computer, but couldn't. She said the "help" file said to "Make sure you had the fax on the screen before attempting to hit the send button." She kept holding the piece of paper on the screen but it would not work!

Cheryl Simer recalls a focus group she conducted on bras, where one of her responsibilities was to dress a mannequin with various prototypes, and then obtain consumer reaction. Rushed for time, she had hurriedly put the bras on the mannequin. The fourth bra to be evaluated suddenly began to slip upward and snapped off the form, shooting up two feet in the air. The consumers took it in stride. With slightly disapproving looks they said they were not very interested in bras that did that!

In future issues, we'll report on more quirky, loopy and strange happenings in the world of market research. If you'd like your story to be told — anything related to research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires — please call me at 818-782-4252 or, better yet, write it up and fax it to me at 818-782-3014 or E-mail me at artshulman@aol.com. ❑

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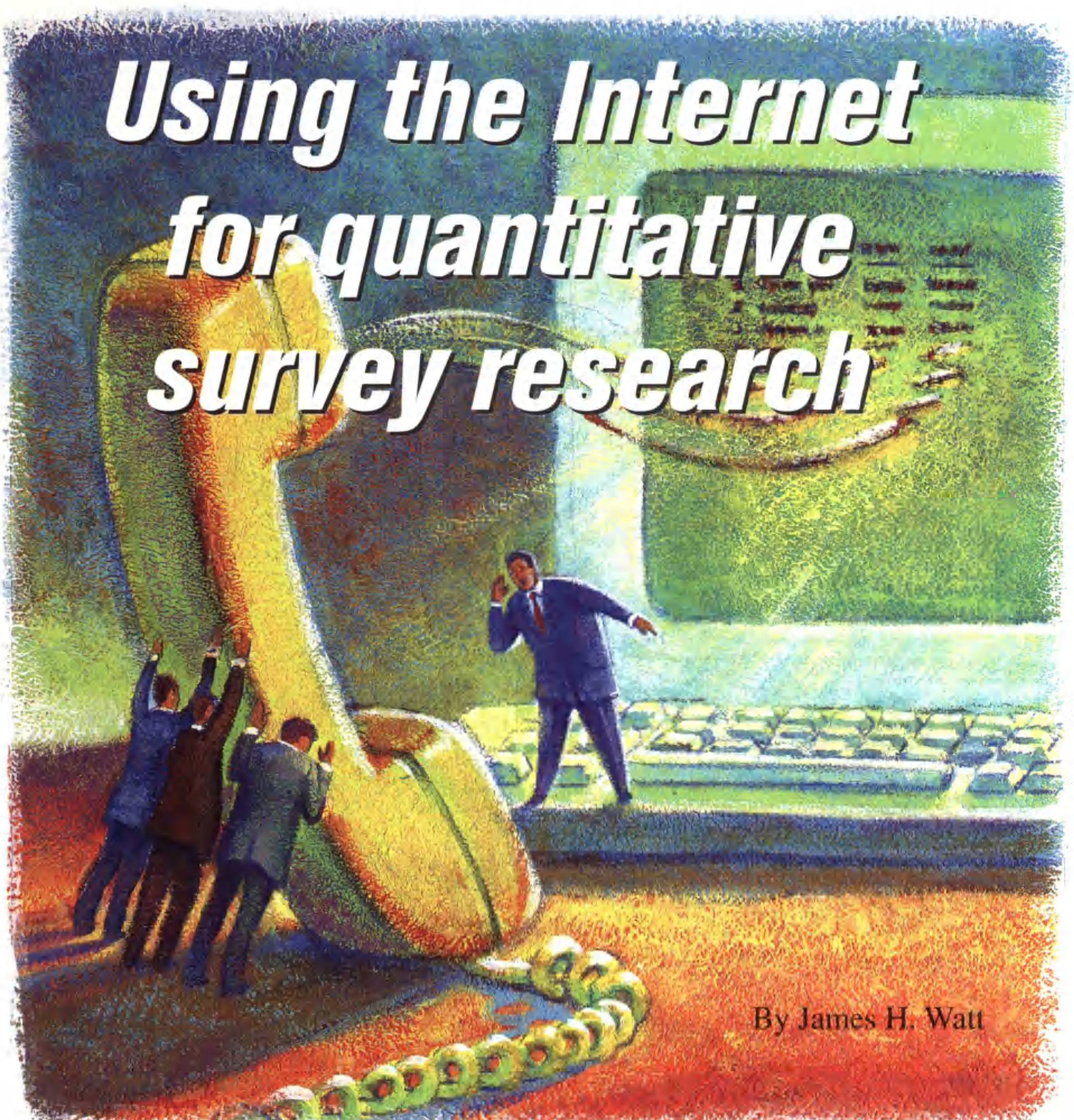
Using the Internet for quantitative survey research



By James H. Watt

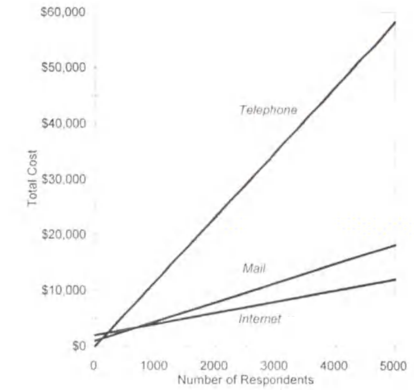
Editor's note: James Watt, Ph.D., is professor of communication sciences, University of Connecticut and vice president for product development, Swift Interactive Technologies, Inc. He can be reached via E-mail at jwatt@SwiftInteractive.com.

To paraphrase a long-distance carrier's commercials: if you haven't done Internet survey research, you will. Because there are some very powerful reasons why you should consider using the Internet for quantitative survey research.

First, there is the speed with which a questionnaire can be created, distributed to respondents, and the data returned. Since printing, mailing and data keying delays are eliminated, you can have data in hand within hours of writing a questionnaire. Data are obtained in electronic form, so statistical analysis software can be programmed to process standard questionnaires and return statistical summaries and charts automatically.

A second reason to consider Internet surveys is cost. Printing, mailing, keying and interviewer costs are eliminated, and the incremental costs of each respondent are typically low, so studies with large numbers of respondents can be done at substantial savings compared to mail or telephone surveys.

Of course, there are some offsetting costs of preparing and distributing an Internet questionnaire. These costs range widely, according to the type of Internet interviewing used. Figure 1 shows some typical comparative costs of mail, telephone, and Internet (Web) survey research. The cost curves are based on a five-page questionnaire, with a 35 percent return rate for mail and a seven-minute duration for telephone interviewing. As the figure shows, the Internet survey is always cheaper by a substantial margin than a telephone survey, is only slightly more expensive than a mail survey for surveys with fewer than about 500 respondents, and becomes increasingly less expensive than mail for more than 500 respondents.



An often overlooked benefit of Internet survey research is the ease with which an Internet survey can be quickly modified. For example, early data returns may suggest additional questions that should be asked. Changing or adding questions on the fly would be nearly impossible with a mail questionnaire and difficult with a telephone questionnaire, but can be achieved in a matter of minutes with some Internet survey systems.

Internet questionnaires delivered with the Web have some unique advantages. They can be made visually pleasing with attractive fonts and graphics. The graphical and hypertext features of the Web can be used to present products for reaction or to explain service offerings. For respondents with current versions of Netscape or Internet Explorer, the two most popular Web browsers, audio and video can be added to the questionnaire. This multimedia ability of Web-delivered questionnaires is unique.

Appropriate populations for Internet survey research

Not all populations are candidates for Internet survey research. The general consumer population is often a poor fit, because fewer than 10 percent of the U.S. households regularly use Internet services (although more are connected, many are infrequent users). There is also a potential problem in the general population with reluctance to use computers, as well as some fear of the intentions of those who use the Internet to ask questions. This fear has been fueled by sensational media accounts of "cyberstalkers" and con artists who prey on Internet users.

However, there are some exceptions

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Names of Note

Denise Munson has been promoted to market research vice president/market research manager, at *Colle & McVoy Marketing Communications*, Minneapolis.

Daniel Hough has joined *Conway|Milliken & Associates*, Chicago, as account group vice president.

Walker Information, Indianapolis, Ind., has promoted **Lisa Amberger** to vice president, business development, and **Elizabeth Edstene** to vice president, data processing North American operations.

Joan Miller has been named manager of Field Services at *ACG Research Solutions*, the research division of Aragon Consulting Group in St. Louis. In addition, **Cynthia Joyner** has joined Aragon Consulting Group as a research analyst and **Philip Behnke** has been appointed vice president and senior consultant for new business development.

Joseph Shantz has been named director of marketing research at *Blattner/Brunner*, a Pittsburgh advertising, marketing and PR firm.

Elrick & Lavidge, an Atlanta research firm, has named **Bill McDonald** account director at the firm's Chicago office. **Ira Berenhaus** has joined the firm's New York City office as vice president/account director.

Tamara Smith has joined *Cramer-Krasselt*, a Chicago advertising and marketing firm, as research supervisor.

Creative Research Services, Inc., Norcross, Ga., has announced several staff additions. In the Atlanta office, **Jill Perry** has been named account executive **Julie Reese** has been named data processing analyst, and **Leslie Kirk** has been named assistant project director. In the firm's Cincinnati, Ohio, office, **Kristin McNeily** has been named assistant project director.

R. Michael Wood has been appointed director of syndicated services of *Teenage Research Unlimited*, Northbrook, Ill.

Wood

Nikki Westfall has been promoted to marketing coordinator at *Herron Associates, Inc.*, an Indianapolis, Ind., research firm.

Schulman, Ronca & Bucuvalas, Inc. (SRBI), a New York City research firm has opened a second survey operations center, a 100-station interviewing facility Ft. Myers, Fla. **Bob Vojinovic**, SRBI's field director, will serve as site manager. At the SRBI New York office, **Chintan Turakhia** has been promoted to vice president and **Jim Newswanger** has been appointed staff statistician. **Kevin Sharpe** has joined the Washington, D.C., office as senior analyst.

Louise Dutka, vice president and director of New England, will head the new *Audits & Surveys* Worldwide New England office in Lincoln, Mass.

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Schulman, Ronca & Bucuvalas, Inc., a New York City research firm, has opened a second survey operations center, a 100-station interviewing facility Ft. Myers, Fla. Bob Vojinovic, SRBI's field director, will serve as site manager.

Creative Research Services, Inc., Norcross, Ga., has a new Web site at http://www.creativeresearch.com. The site features information on company capabilities, specialty products and new product offerings.

The Advertising Research Foundation (ARF) has honored the American Plastics Council's image advertising campaign with a gold medallion at the ARF's 1997 David Ogilvy Research Awards program. The campaign was created by D'Arcy Masius Benton & Bowles/Detroit using research studies conducted by **Wirthlin Worldwide**. The annual David Ogilvy Research Awards recognize outstanding research contributions to the development of successful advertising campaigns.

Dennis and Company, Inc., has moved to 1111 Summer St., Stamford, Conn., 06905. Phone 203-327-2222. Fax 203-973-0222.

Kerr & Downs Research has moved to 2992 Habersham Dr., Tallahassee, Fla., 32308. Phone 904-222-8111. Fax 904-906-3112. E-mail pd@kerr-downs.com.

The Namestormers have moved to 2811 Declaration Circle, Lago Vista, Texas, 78645-7523.

The Olson Research Group has moved to 666 Plainsboro Rd., The Office Center, Ste. 1210, Plainsboro, N.J., 08536. Phone 609-799-5311. Fax 609-716-7161.

Audits & Surveys Worldwide, New York, has opened a New England office near Boston at 3 Garland Rd., Lincoln, Mass., 01773. Phone 617-259-4413. Fax 617-259-8493. The office will be headed by Louise Dutka, vice president and director of New England.

MarketVision/Gateway Research, a division of MarketVision Research, Inc., Cincinnati, has opened a consumer research center at the Six Flags AstroWorld theme park in Houston, its fourth permanent facility in a theme park environment.

Quest Research, Houston, has been tapped by British software firm Tetra International to provide ongoing strategic research, data collection and database development among both North American-based multinational firms and multi-site nationals.

Porchey Research Inc., St, Louis, has opened a Web site at http://www.porchey.com. The site includes information on the company and its research services as well as client testimonials.

Aragon Consulting Group, St. Louis, has opened three new offices in the Chicago, Los Angeles and San Francisco metro areas. The Chicago office (phone 312-269-0993) will be staffed by John Adams, vice president and senior consultant. Diane Dailacis, vice president and senior consultant, will head the Los Angeles office (phone 714-738-7334). Larry Felix will run the San Francisco office (phone 415-362-2395).

After a one-year hiatus, Sacramento has returned to the top spot for unlisted numbers, **Survey Sampling Inc.** (SSI), Fairfield, Conn. Last year, Oakland held the number one position. Currently, 95 percent of the nation's households are estimated to have a telephone, of which 29.6 percent are not included in published telephone directories. In 1984 (the first year SSI analyzed unlisted rates), the unlisted group made up only 21.8 percent of telephone households, indicating that the number of unlisted households has increased by 36 percent

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Internet research:

still a few hurdles to clear

By Sharon Weissbach

Editor's note: Sharon Weissbach is data modeling manager, National City, Louisville, Ky.

Discussions about the Internet have moved well beyond the question of whether it will be a factor in the future of education, commerce, entertainment and communication. Now the only reasonable disagreement is about how soon it will reach mass popularity.

Marketing research is just one of the fields bound to be transformed as online technology catches up to the visions of the visionaries. As problems of speed and ease of access are overcome, more and more people will flock to the Internet. Marketing researchers need to be there with them if they want to keep the profession relevant. Articles in the professional magazines and journals have already begun to consider the Internet as part of the research mix. So it is important to begin creative thinking now about how marketing research can thrive in this new medium and how it can use fresh approaches to improve research quality.

Some of the barriers to conducting research on the Internet are temporary hindrances whereas others are inherent to the environment. Current users of the Internet are a non-representative sample of the population as a whole, but as more people use the Internet this becomes less and less of an issue. It will be a while before those on the Internet are representative for most marketing research studies, but there are many inquiries, such as research about the Internet itself or other computer topics, for which the Internet crowd is already a perfectly reasonable population from which to sample. Even Internet skeptics must admit that, in the long run, limiting surveys to Internet users may be no more problematic than relying on telephone interviews is today.

The CommerceNet/Nielsen Internet Demographics Study (http://www.nielsenmedia.com) is a World Wide Web survey done in conjunction with a phone survey to assess the bias inherent in the Web data. As the discrepancy between the two survey formats decreases the Web becomes a mass market vehicle. This may be quite a few years away but in the age of rapid change and widespread adoption of new technologies, many are betting on it happening sooner rather than later.

Worried about privacy

Security on the Internet is a major concern and users today are quite understandably worried about privacy issues. Given the commercial incentives for insuring that information such as credit card numbers can be transmitted safely, however, encryption methodology will be at the forefront of Internet developments. As people become comfortable buying goods, filling out application forms and transmitting private communications over the Internet, they won't be troubled by submitting survey responses. There is also the

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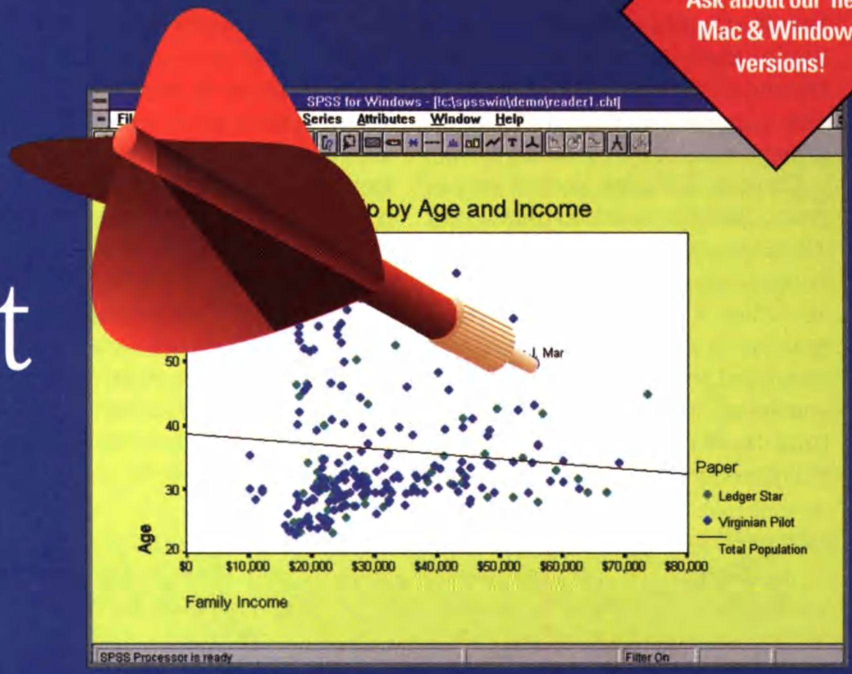

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benefit, already noticed in computer-administered interviews, that people become very comfortable interacting with a computer and have a sense of privacy since they are working alone.

The lack of human contact can, of course, also be a drawback. There may not be enough motivation to continue through a long list of questions without interaction with another person on the other end of the line or the incentive of being paid and actually going to a research facility. An encouraging human voice can be most effective in convincing a person to agree to participate in a survey.

One solution is to combine techniques to attain good rates of cooperation. A standard approach to increase participation in telephone interviewing is to send a postcard first telling the subject to expect a call. The mails are also used for follow-up cards reminding people to send in their questionnaires. For Internet surveys, both regular and E-mail can be used similarly.

Using snail mail may seem primitive but for marketing researchers trying to maximize representativeness and participation in a research effort, it's useful to approach subjects from different angles. For example, instead of just putting a survey out on the Internet and ending up with a totally self-selecting sample, a researcher could mail letters to a targeted group which includes an ID and an Internet address so that only those solicited will be able to get onto the survey site. In this scenario survey responses can be tied back to information already known about the individuals recruited by matching data with their original identification codes.

Another way to motivate survey participation is to let respondents into a restricted area of a Web site once they complete the survey. Other enticements could include entry in a contest, the chance to download some personal software, participation in a game or a customized report based on information given.

Appealing graphics could increase involvement by making things interesting, but given the current state of most Internet connections, it's unwise to risk scaring respondents away by having them wait for the time-consuming loading of extraneous features. As new telephone, cable and satellite connections increase communication speed, this will become less and less of an issue and wonderful creative opportunities will be available for marketing researchers.

Much potential

The most obvious benefit of using the Internet for research is the ability to reach large numbers of people. It is hard to imagine another medium which can provide so much potential while remaining economically feasible. The Internet is an international arena where many barriers to communication have been erased. The Graphics, Visualization and Usability Center (GVU) and the Georgia Institute of Technology, which report conducting "the oldest and largest public service Web-based surveys" (http://www.cc.gatech.edu/gvu/user_surveys) are currently experimenting with surveys in French, German, Spanish and Japanese. Participation is encouraged by appealing to a sense of working for the public good when it is stated that "your time and effort is greatly appreciated and will help monitor and guide the growth of future Web developments."

Of course, as the software develops, Internet surveys will have all the benefits associated with other forms of computer surveying. One appealing aspect of interacting with computers is that they let people respond at their own speed. Techniques such as surveys on diskette offer freedom from strict time constraints. It would be hard to overestimate the advantages of flexibility and convenience in today's environment where it is harder and harder to reach busy, active potential respondents.

As with other computer-assisted surveys, the sophisticated Internet survey can tailor follow-up questions to responses and review missing answers and errors so that they can be corrected. It would even be possible for a respondent to establish an ID when starting a survey so that there is no need finish in one sitting. That approach, if successful, would be a plus when longer surveys are needed (and it would certainly be an area for potential research to determine whether the same rules for survey length apply when people can respond in bits and pieces).

These are all things that can be achieved today to some extent through either surveys on diskette, computer administration of surveys on-site or computer-assisted telephone interviewing, but it is important to remember the potential of the Internet for bringing together the best of a variety of approaches.

Internet as platform

One way to take advantage of the Internet environment for marketing research is to use it as a platform for questionnaires that would be inefficient to conduct using most current approaches. It isn't worthwhile to conduct a phone survey to ask two or three questions. But on the Internet, a survey component could unobtrusively be included within a general site which is used for marketing or business transactions. For example, if a person accesses a banking home page and then goes to the "Credit Card" link, he or she could be asked a few questions about the features of a credit card they find most important before moving along to the information component. You have to be careful not to antagonize people by getting in their way or taking up too much time, but wit and creativity can be the basis for attracting and keeping consumer interest. Of course, the best way to insure that a person will want to share opinions is to put the shared data to work right away in a practical application. If a person knows that answering questions will result in more personalized information from a site, the immediate payback is a great motivator.

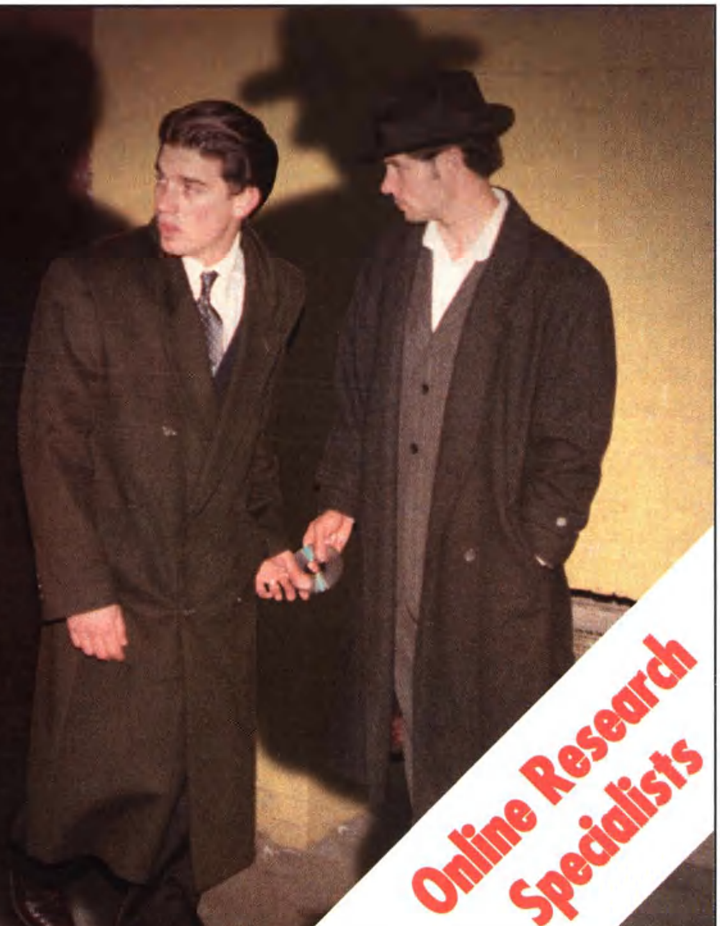
Marketing researchers as a group are extremely trustworthy and have consistently had very high ethical standards in guarding confidentiality and only using data in ways approved by informed consent, but use of the Internet does demand the evaluation of some new capabilities in light of professional standards and privacy issues. Microsoft received negative publicity when it was rumored that the company was trying to discover pirated software by looking at the hard drive of each person who registered Windows 95. While Microsoft probably had no such agenda but was simply gathering consumer information for marketing purposes, the propriety of such unauthorized data capture is highly questionable. Organizations like the Electronic Frontier

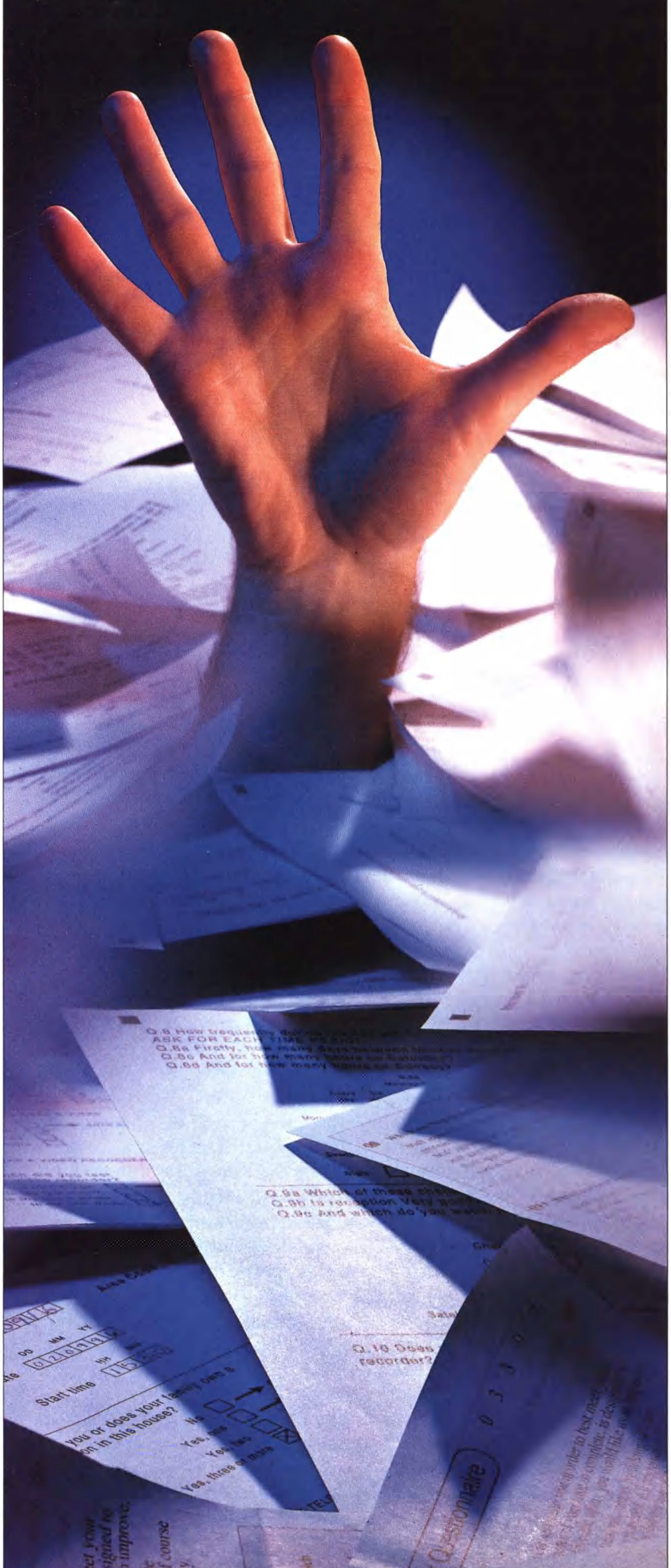
Foundation are working to guarantee civil liberties on the Internet and it is important that reputable researchers become knowledgeable enough about new technologies to define their principles in an enlightened and sensitive manner. Marketing researchers on the Internet will also have to be aware that there are now even more opportunities for selling under the guise of research and it will be a challenge to differentiate the reputable projects from those using deceptive practices.

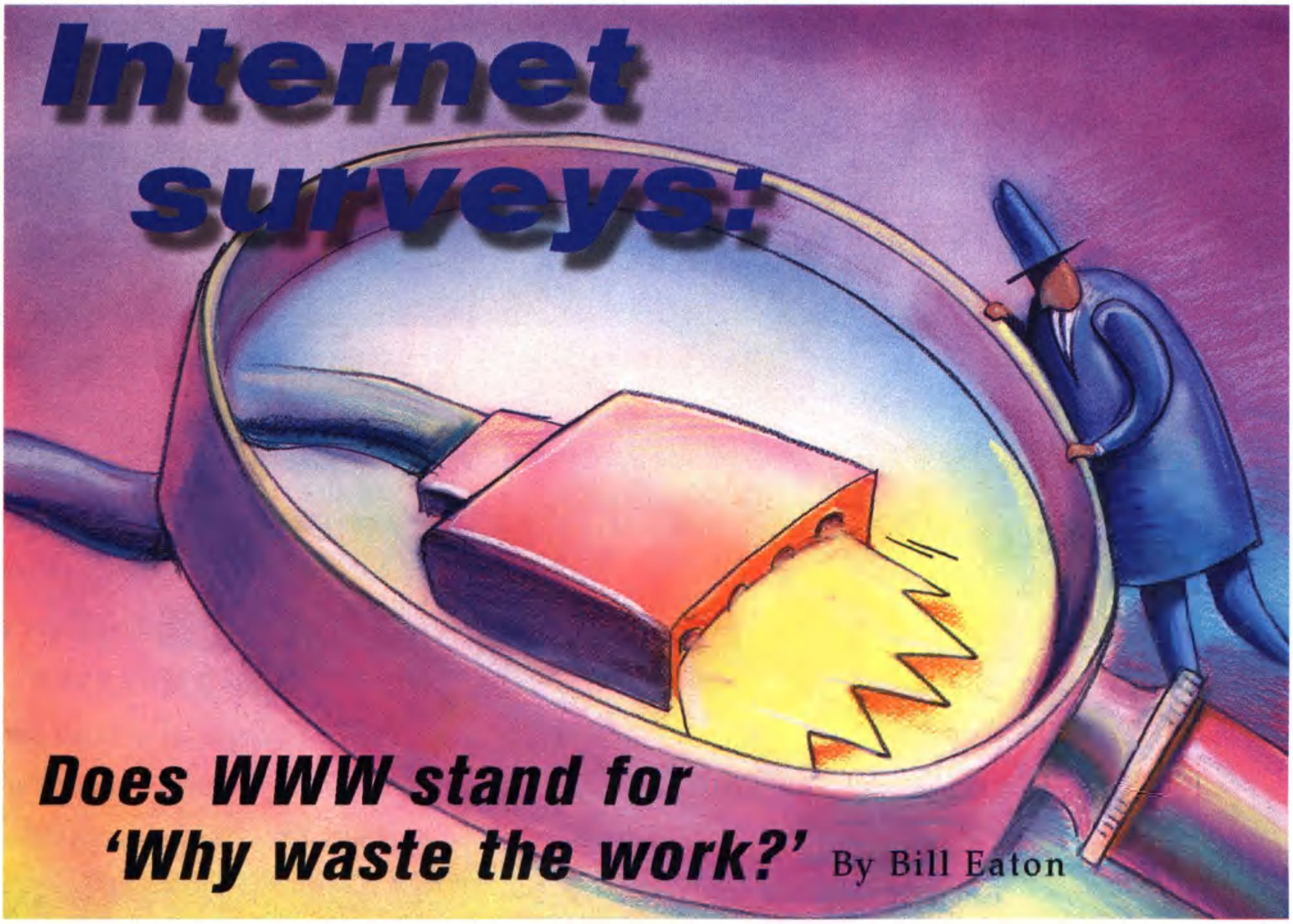
Resistance will diminish

Many people are still nervous about the Internet and may be hesitant to divulge information electronically which they would freely give over the phone or to a researcher in the mall. This resistance will diminish over time. Once people become comfortable in using credit cards for Internet purchases and transmitting other forms of digital cash, they will also share their ideas without fear of misappropriation. All issues regarding confidentiality and informed consent must be meticulously considered so that each researcher is aware of ways in which this medium may affect research ethics.

The possibilities for abuse of trust on the Internet are not that much greater than through the mails or phone lines but in order to attract respondents, researchers will need to be more explicit than ever in their guarantees of safety and in supporting the validity of their projects. These efforts will be worthwhile in tapping into a communication network with so many exciting possibilities. ❑







Internet surveys: Does WWW stand for 'Why waste the work?'

By Bill Eaton

Editor's note: Bill Eaton is vice president of Creative Research Systems, Inc., Petaluma, Calif.

It's difficult to open a marketing magazine these days without seeing details of a new survey conducted via the Internet. It's the latest and greatest toy for all those researchers who love the black box approach to research, where the medium is more important than the message.

Like most other methods there are advantages and disadvantages to surveys conducted via the Internet. Let's start with the advantages.

They are extremely fast. You can post a questionnaire on a Web site and start to receive replies almost instantly from Net surfers. Within a few hours you will probably have an adequate sized sample. This involves less effort, but is no quicker than a phone survey with an adequate number of stations.

The second advantage is that there is almost no cost involved. Once the questionnaire is posted on a Web site there are no further printing, postage or long-distance costs. Compared to traditional methods where every extra interview costs money, this is extremely attractive.

So Internet surveys are fast, economical — and deadly!

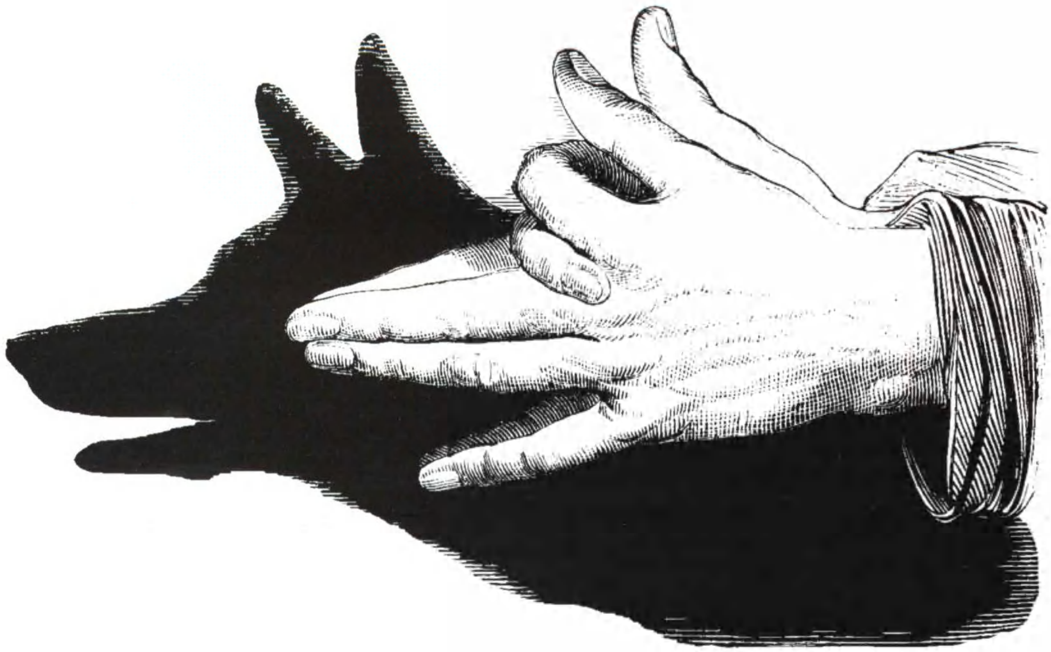
Internet surveys and the Golden Rules of Research

The inherent problems of Internet surveying are rooted in the three basic rules that I learned in Research 101 many years ago. Rule #1 is that you cannot ask men for the opinions of women, Republicans for the beliefs of Democrats or users for the thoughts of non-users. In statistical terms, a sample represents the universe from which it was drawn — and no one else. And who makes up the Internet universe?

The universe you are surveying on the Internet is a well-educated, high-tech and high-income (and even nerdy) one. Respondents may represent the Steve Jobs and Bill Gates of this world (albeit with less cash) or even the Kevin Mitnicks but not much else. So rule #1 is strike #1 — you cannot use the Internet for anything other then surveys of very specific, Internet-based groups

Let's take a look at rule #2. This says you go look for your sample — you don't let your sample come to you. When one of the major causes of concern in survey research is the low and declining percentage of people willing to undertake a survey when requested, what are we to make of volunteers who surf Web sites? That they are not representative of much, other than Net surfers! In addition, volunteer respondents usually have stronger than average opinions for or against a subject — so strong that they are prepared to seek out someone to unload these opinions on. While some Internet surveys do seek out specific respondents, most simply pick up opinions from Web surfers who cruise that site. So your volunteer respondents almost certainly have stronger opinions than your average consumer. Strike #2!

Rule #3 — you can only vote once. Tammany Hall is not allowed in survey



research. This is normally controlled by careful fieldwork and back-checking of paper questionnaires or with phone numbers selected to avoid duplication. With Internet surveys, quality control is almost non-existent — most of the Internet survey programs cannot detect repeat voting, and even those that do can be disabled by smart hackers, who take a perverted intellectual pride in trashing safeguards of this type.

If you don't believe me, ask *InfoWorld* what happened to their March 1997 Readers Choice survey — conducted for the first time by Internet. The results were so skewed by repeat voting for one product that the entire survey was publicly abandoned and the editor asked for readers' help to avoid the problem again. And it's not the first time. Last year another survey of two well known competing software programs had a similar result — one side loaded the vote to the point that it became blatantly obvious.

What is even more dangerous is the knowledge that there almost certainly are many more fraudulent surveys that remain undetected. No one knows how many, but I hate to think how many business decisions were based on the results of such surveys. So Strike #3!

Can Internet surveys work? Maybe — if you can control for the three problem areas. One, if there are strong controls to avoid multiple polling. Two, if the surveys are properly distributed to a genuine sample and the results properly back-checked. Three (and most important), the results must not be extrapolated beyond Internet users.

Surfin' USA?

A 1995 survey by the Electronic Industries Association gave modem ownership as 16 percent. Obviously, not everyone used a modem on their PC so the regular Internet usership level was probably about 10 percent. One year later a survey by the Wirthlin Research Group claimed that 20 percent or about 42 million adult Americans had used the Internet but this figure was basically an "ever used" figure. The claimed regular user total was about 14 percent. Probably the most recent survey was conducted in Spring 1997 by CommerceNet/Nielsen. It revealed that 22 percent of Americans had "recently used the Internet." However about a quarter of this group had not used the World Wide Web, indicating that they were probably using the Internet for E-mail only. Allowing for minor over-claiming about the topic of the month and the growth between the surveys probably no more than 12 percent of Americans are regular users of the Web.

Except for television at 98 percent, the telephone (with ownership at 96 percent) is the closest thing to a universal appliance in American homes. Even in the most rural and poorest homes it's about 90 percent, so you get as good coverage of America as you are likely to get.

Now ask yourself: If telephone ownership in the USA were limited to 12 percent of the population, would you use it for market surveys? I doubt it and even then a phone conversation is a one-on-one operation — you don't have to surf AT&T at random until you find a survey waiting to be answered.

Although computer prices have declined (and continue to decline) dramatically, a minimalist set up is still around \$1,000 — compared to a \$10 monthly rental for a phone. PC industry leaders talk of \$500 Net PCs, but none have reached the market yet and even \$500 is expensive in comparison to a phone.

Computers also require some technical training, and there is a core sector of American society that is unable or unwilling to undertake this. Studies (not conducted by Internet) have shown that, even when available at no cost, some people simply do not want to adapt to the new technology. Some of this follows the Diffusion of Innovation theory where the introduction of a new product follows the classic bell curve. Currently computer ownership has just reached the early majority phase and Internet users are still in the early adopter phase. Obviously these levels will continue to grow. If, however, growth follows the pattern of other new technologies (phones, TV, etc.) it will be at least a generation before Internet surveys are reasonably representative and they may never become fully representative, as the final group of non-adopters may remain significantly large due to cost and/or inability to adopt to the new technology.

Haves and have-nots

Will Internet surveys work better in the future? As usership spreads to representative levels, they may be usable for the information generation but given the current progress of American society towards two classes of information haves and have-nots, there may remain a significant class who cannot be reached by this method. So for now (and for the foreseeable future) the law is three strikes and you're out! ❑

Women offer tips to make Internet commerce more appealing

By Amy Yoffie

Editor's note: Amy Yoffie is president of Research Connections, Inc., an on-line marketing research firm in Westfield, N.J.

One of the most obvious reasons for on-line vendors to target women is that they are more likely to shop. This is not a sexist statement, but rather the reality of the retail world. Research has shown that women purchase 90 percent of home products, clothing, health care and perishable products.

Marketers, then, have a choice — they can try to convert men into shoppers, or they can reach out to women already on-line and also work to attract more women to this medium.

To learn more about why women go on-line and how they view Internet commerce, we E-mailed 10,000 questionnaires to randomly selected women who had registered at one or more Web sites. Normally, surveys like this achieve about a 1 percent response rate. This time we received a 4 percent response rate. Some may believe that women are invisible on the Internet, but they certainly want to be heard. In fact, 45 percent of those who answered said they would be willing to participate in future surveys.

The women who answered were active on-line users, with 52 percent telling us that they spend 10 or more hours a week on-line.

Number of Hours Spent On-line Per Week (n=392)

Hours	% of Total
Less than 6	21
6-9	27
10-20	28
More than 20	24

Respondents were predominantly in the 35-54 age group.

Age (n=392)

	% of Total
18-24	5
25-34	19
35-44	31
45-54	32
55-64	8
65+	3

Our survey confirms findings reported by others, that on-line shopping ranks low in interest. However, while other factors may bring women onto the Web, our survey showed that once they are there, 75 percent shop and 60 percent actually buy.

Reasons For Going On-line (n=392)

	% of Total *(multiple responses accepted)*
Send/receive E-mail	97
Education/research	81
Browsing/surfing	74
Community/chat groups	48
Shop products/services	38
Other	23

Easy and fun

Many of the women in our survey, even those who have not yet bought anything on-line, expressed an interest in doing so in the future. They see the enormous potential. They want it to be fun, they want it to be easy, and they seek the variety that on-line has the potential to give them. In other words, they want more, not less. "Include products that appeal to a wide audience," one respondent wrote. "If you're selling clothing, make sure to have all sizes available, including kids and large-size adults." And she added this advice: "Don't make the shipping charges so high that you discourage people from using the service. Remember to use sales and buying in bulk to save on charges; this would motivate more to use the service."

Making the buying experience positive was a major theme among our respondents. They gave several pointers on how to keep them coming back. One woman wrote: "1. Make it fun and attractive. 2. Make it easy, not a lot of 'junk' pages that take up my time. Get right to the point. 3. Make sure finding your site is easy — easily searchable on all search engines with several different key words. Offer free tech support/talk for the first-time user."

Women in our study confirmed our belief that they shop on-line because it saves time. "I shop on-line particularly around holidays and birthdays, due to time management considerations, not because I find great deals," one told us.

Primary Reasons to Shop On-line (n=239)

	% of Total *(multiple responses accepted)*
Convenience	59
Speed	26
Information available on-line	26
Ease compared with in-person	20
Lack of crowds	17
Product/choice diversity	14
Cost savings	10
Ease compared with catalog	8
Other	7

Seventy-nine percent of the women reported that they were the primary shopper in the household. Ninety percent of the women made on-line purchases for themselves, 46 percent did so for their family members, and 37 percent for friends or relatives. Women in our survey who bought on-line said they spent an average of $400 in the past year and plan to spend $600 in the next year, a projected increase of 50 percent in just one year.

Bought On-line (n=239)

	% of Total *(multiple responses accepted)*
Computer software	30
Books	21
Travel arrangements	19
Gift items	18
Flowers	12
Music (CDs, tapes, etc.)	12
Computer hardware	11
Clothing	8
Other office equipment	4
Event tickets	4
Videos	4
Food/groceries	3
Automobiles	3
Other	7

While computer hardware and software are considered to be male products, software also tops the list of purchases made by women, with books, travel arrangements and gift items following.

Fear of fraud

Another reason that marketers should be appealing to women is that women are heavy users of credit cards. Right now that is the payment method of choice on the Internet. In fact, 74 percent of women purchasers in our study paid for on-line products and services with a credit card.

But, 57 percent of non-buying women in our study cited the threat of credit card fraud as the primary barrier to purchasing on-line. The concern over credit card security came from buyers and non-buyers. "Please provide a secured environment for charge card purchases," one woman offered. "Nothing is perfect but knowing that there is a secured connection when entering my charge card helps. If I feel safe giving that much information, it is much nicer than catalogue shopping and very convenient."

Method of Payment (n=239)

	% of Total *(multiple responses accepted)*
Entered credit card # on-line	74
Called/faxed credit card #	19
Mailed in check	19
C.O.D.	6
Other	13

They also urged alternative payment options: debit cards, COD, 800-numbers, order by fax, and electronic checks. Several suggested that billing be done through an Internet service provider or a commercial on-line service, with AOL being mentioned most often.

Other key reasons for not buying on-line were: the need to touch, feel or try on a product; not seeing any products that would motivate a purchase, and a desire to speak to a "live" person before buying.

Reasons For Not Buying On-line (n=153)	% of Total (multiple responses accepted)
Threat of credit card fraud	57
Need to touch/feel/try on what I buy	48
Have not seen anything I wanted to buy	35
Prefer to talk to someone when I buy	31
Not familiar with companies offering merchandise	16
Other	27

Favor well-known firms

The desire for ease of payment and refunds, reliability, customer service, and ability to cancel orders all are a concern. This points to a boon for traditional vendors who already have an off-line reputation. Indeed, women seem to favor firms that are well-known off-line. One wrote: "I think some people are leery about buying on-line because of the rumors of quacks out there. Buyers want to be sure they are dealing with a company that will honor their product and reputation."

This is a double-edged sword, however, as women complained about the fact that on-line shopping areas do not carry as much merchandise as their physical locations. In other words, once they started shopping on-line, they wanted to accomplish as much as possible there. They see no obvious advantage to buying on-line if they have to go to the store anyway. One woman wrote: "I've been to three areas for purchasing goods, Office Max, JC Penney's and a cook book service. What I found dissatisfying was being unable to purchase anything that the store sold. I could only purchase what was made available through the on-line service."

Of course, unknown on-line vendors who make it easy to shop and buy can gain a significant edge, as demonstrated by Amazon.com, an on-line book seller. As one respondent suggested: "Have a reasonable return policy and credit my account promptly for properly returned merchandise. Sell good stuff at value prices. I don't want junk, and I won't pay inflated prices just for the 'prestige' (ha) of shopping on the Net. Go buy something from Amazon.com. They do it right."

Provide information

One way to reach women may be to provide them with information. In our survey, 81 percent said they go on-line for education and research. Yet research has shown that more women than men (40 percent to 31 percent) said they had trouble finding information on-line.

Women in our survey were eager to gather as much information on what they were buying as possible. One woman offered: "Give me plenty of information about content, sizing, colors, requirements for using the product, etc. Don't skimp on the copy."

Interestingly, despite conventional wisdom on the need to keep sites simple and graphics to a minimum, there was an overwhelming desire for photographs of merchandise. And not just one photograph; these women urged marketers to take advantage of the medium to show multiple photos of the same items "from several angles."

One told us: "What impresses me most about on-line shopping is a company's ability to present a product so effectively. Not only do you see the product, but it is described in much detail, leaving little doubt about what the product has to offer. Comparison shopping is easier . . . As long as product presentation is attractive, detailed and easy to order, I will continue to shop on-line."

Respondents said that companies need to develop easier tools for navigating their sites, robust search engines, and quick, efficient and painless on-line ordering mechanisms. One wrote: "Make it easy to find (companies) and their products — getting to some sites isn't intuitive and lots of people don't spend time thinking (how to get there). I think of it as a challenge and like the searching process, but I know others who have given up."

But these women offered warnings about having too much information on a Web site. Their advice was that sites should begin with basic information and leave it to the shopper to determine the amount of information she needs. To quote one: "Get to the point. Offer the product and have a buy option up top, with other options to learn more about the product, guarantee, etc., below that, and then frequent buy options scattered in between. I HATE having to go through a lot of copy when I know what I want."

The women were nearly unanimous in their appeal to marketers to advertise anywhere but in their E-mail box. They said how much they hate junk E-mail and its negative effect on their decision making. When asked what advice they would give companies that market products on-line, one woman said: "First and foremost, I would tell these people to stop filling my mailbox with their stuff. If I want it, I will go out on the WWW and look for it. It is annoying, and in most cases does the exact opposite of what it intends. If I am looking for a product or service, and I see that I get unsolicited E-mail, I will go out of my way to avoid the company that does not respect my privacy."

Reap rewards

While on-line commerce may seem to present myriad challenges to marketers, evidence shows that women shop on-line the way they always have: using credit cards, looking for quality and bargains, and returning to businesses that provide a positive, comfortable and enjoyable buying environment. Companies that deliver these service attributes will be ideally positioned to reap the rewards of this fast-growing marketing opportunity. ❑

On-line focus groups: 4 approaches that work

By Paul Jacobson

Editor's note: Paul Jacobson is senior vice president of Greenfield Consulting Group, Inc., and Greenfield Online, Westport, Conn.

We've watched with great interest the swirling debate over on-line focus groups. Some decry on-line groups as blasphemy, the ruination of our craft! Others debate nomenclature or engage in semantics — whether to call a moderated on-line discussion an on-line focus group, or something else, given the absence of that telltale body language.

We recognize that on-line marketing research is in its relative infancy, though growing at Bunyanesque rates. And since the only rule of this game thus far is constant change, we're loath to state any hard and fast rules. That said, we have an unequivocal opinion on the subject of on-line focus groups (or whatever one wishes to call them) — they work!

As a company that has conducted "off-line" focus groups since the early 1980s — and in any given week has up to 10 moderators roaming the country, checking out the body language — it might be understandable for us to be naysayers. After all, why would we get behind a methodology that might cannibalize an off-line business base that has grown for the past 14 years? The truth is, on-line focus groups are not a substitute for the face-to-face thing, and were never meant to be. This is simply an additional tool in the box, meant to productively coexist with "the real thing." And under the right circumstances, clients get substantial bang for their buck (and they get to sleep in their own beds at night, too!).

There are circumstances when the on-line approach is inappropriate. Highly emotive subject matter, in which the skilled moderator peels away layers of "skin" to get to deeply held attitudes and emotions is one. Circumstances in which panelists are asked to work with photographs and icons to build collages are another. (We admittedly haven't yet figured out a way to dump 50 images on a cyber table and have people sort through and pin the right ones on the virtual wall.) Working in certain low-end or commodity product or service categories, where the prospect profile just doesn't sync with the profile of Internet users, is another obvious example.

So what does work? Here are four successful designs to consider, provided as mini-cases.

• **Trend monitoring** — when you recruit people who represent leading-edge users of a certain product or service to see what they're up to, what new category language exists and where the category is heading.

A leading manufacturer of office equipment sought to understand meaningful physical and cultural shifts in the office environment, and the effect of high technology on the work space. Greenfield recruited full-time employees who work in open spaces and who have access to the Internet from their offices. The discussion centered on changes in the office environment, encompassing issues such as noise levels, visual and acoustical privacy, and housing and using high-tech equipment. Findings from these

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sessions confirmed short-term product and marketing priorities and helped generate new product directions and nomenclature, for the longer term.

• **Screening a large pool of concepts to a smaller, more manageable set, for further evaluation** — be it qualitative and/or quantitative evaluation.

A worldwide provider of disposable and rechargeable batteries needed to evaluate five new print campaign concepts, ultimately looking to screen down to two campaigns for final evaluation. Typeset color comps from each campaign were shown to owners of cellular telephones in the on-line setting. Panelists were able to spend ample time with each of five print executions, with the moderator subsequently probing on overall impact, main point, likes and dislikes, clarity and credibility. This qualitative work was critical in reducing the number of contending campaigns from five to two, for final decision-making.

• **Evaluating the effectiveness of Web sites.** This evaluation can be progressive, identifying concept appeal, gaining critical content and navigation direction at the beta stage, and understanding how the final site delivers against the company's Web marketing/brand marketing objectives.

A regional communications company with an aggressive approach to developing on-line businesses had a vision for a new travel-based service for both business and leisure travelers. Prior to embarking on expensive developmental work, the company wanted feedback from heavy business travelers (who also combine leisure travel), to gauge the level of interest and to see what core benefits bubbled to the top. This information was instrumental in the decision to go to the beta design stage, and what specific areas to focus on in site design.

The next phase of on-line qualitative work required prospects to visit the test site, conduct a number of tasks, and share their experiences in a moderated group setting. This activity provided fundamental learning from which the final, live (and now highly successful) version was created.

• **Generating additional diagnostics from recent participants in a quantitative research study**. Frequently on-line surveys are conducted revealing areas that are worthy of further exploration. Working in the on-line medium allows researchers to quickly convene an on-line discussion among a group of people who responded in a like manner. This can be a time- and cost-efficient way to get additional input, float some new ideas, or even brainstorm new approaches.

Another global marketer was interested in transferring a broad cross section of their customer service functions to the Web. On-line quantitative research revealed that certain of their market segments found this a highly appealing and practical approach, while certain others were concerned about losing "personalized service." On-line focus groups were conducted among those same dissenters who participated in the quantitative exercise to determine which activities could be handled on-line and which should be done in a more traditional fashion. Importantly, brainstorming among this group resulted in new components being added to the service mix.

Could these groups have been conducted in the time-honored, face-to-face fashion? No doubt about it. The fact is, however, all this work took place on-line, in many cases resulting in substantial time and cost savings — to say nothing of obviating the sometimes disruptive effect of key executives being on the road for a week at a time — who then have to work the weekend to catch up when they return home.

Managing expectations

We have found that the key to successful use of on-line focus groups lies in managing expectations. The first expectation to manage is that on-line focus groups are not the same as "regular" focus groups, and there are limitations to what can be accomplished. Spelling out the pros and cons of the methodology up front is essential to the process. The second step is to give clients a feel for what the experience and deliverables will be, in advance of the session. We make it a requirement that clients participate in a dress rehearsal before the actual sessions take place, so they can decide whether the vehicle makes sense for their research needs.

Fortunately, Greenfield practices both on-line and off-line focus groups, every week. This allows us to be pretty objective about when to use which tool, without having to sell or defend either. Our interest is in creating the best design and working with satisfied clients. Alas, we still haven't solved that pressing semantic issue. ❑

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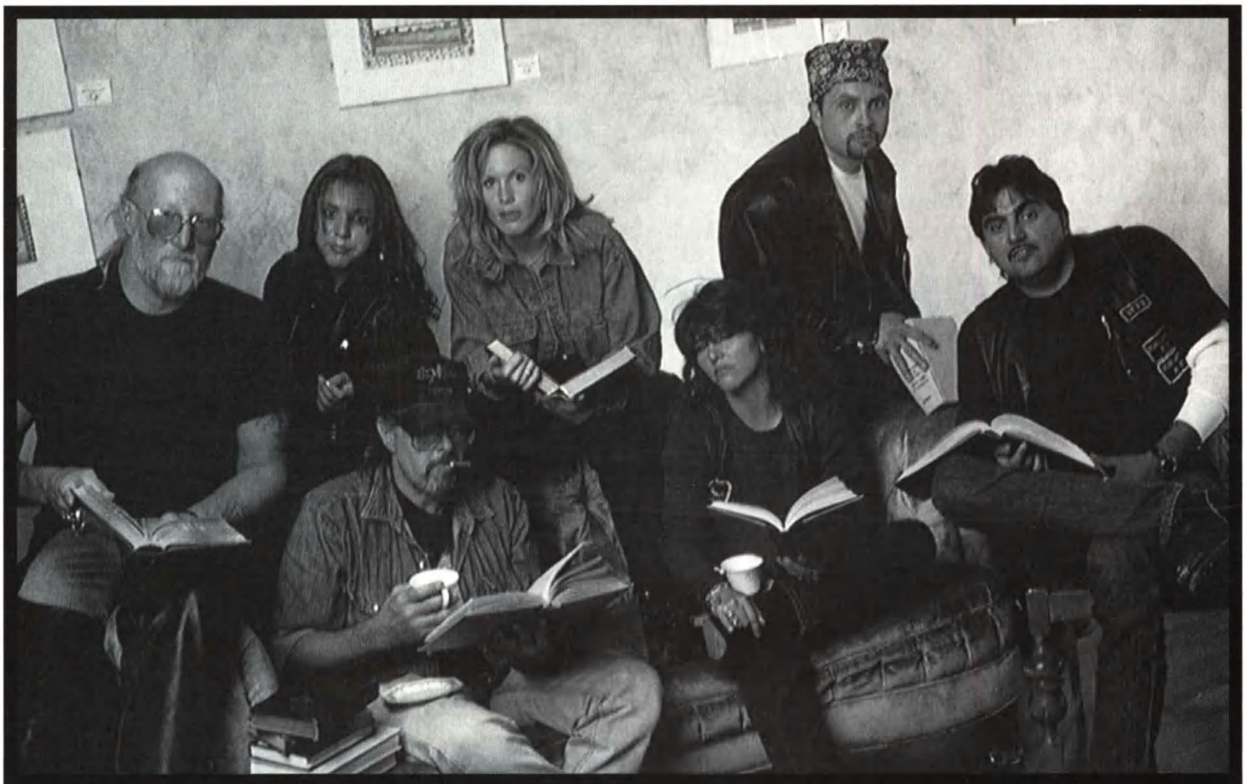

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Planning health care focus groups? Pack your scuba gear

By Ariella LaBell

Editor's note: Ariella LaBell is a consultant with The HSM Group, a Scottsdale, Ariz.-based marketing research and consulting firm specializing in the health care industry.

Have you ever noticed the way backroom viewers' eyes light up when they learn something significant or unexpected from their customers? Clients' fascination with participants' colorful and uninhibited expressions often reminds me of curious children admiring tropical fish during a visit to an aquarium.

Like aquariums, focus groups give us a chance to view a hidden world. But these days, we can't count on easily snaring respondent insights. Particularly in health care, we're seeing more and more that consumers, besieged with verbal, print and television advertising on the state of health care, are telling us what they hear rather than what they really think.

To reach the depths of discovery often required in health care research, it takes more than snorkeling fins. You have to use your scuba gear.

Getting to the truth

In research we often refer to the qualitative questioning technique of asking The Five Whys. In its literal sense, the expression suggests an interviewer should ask a question and then follow-up the participant's response with "Why?" and "Why?" again a total of five times to get to the root cause of a concern or behavior. In practice, The Five Whys is a reminder that you can't always take the first answer as the answer. It is important to confirm understanding of participants' responses with more open-ended probes.

Particularly in patient satisfaction and health plan disenrollment research, moderators must have a firm understanding of the common "untruths." For example, having conducted research with both Medicare HMO disenrollees as well the marketing directors trying to retain them, we have learned members frequently cite cost as the primary reason for disenrolling from their current health plan and switching to another. However, we learned that if you follow up with disenrollees to find out where they went, somewhere close to 50 percent actually move to more expensive plans.

What this shows is that while a member might initially associate the reason with cost, it may have actually been perceived lack of value, service issues, or physician selection that truly caused the member to switch. The appropriate approach would then be to solicit more details about the participant's experience to better understand the true issues leading to disenrollment. The immediate answer, and often the simplest, is not always the right answer.

Cut through the bias

After conducting focus groups with the entire spectrum of players in the health care industry — suppliers, providers, payers, employers and consumers — you get a very clear picture of some the current and future patterns in the delivery of health care. One common characteristic in particular adds to the complexity of conducting focus groups: frustration with managed care and reductions in reimbursement.

No segment of the health care delivery chain is unaffected by the whirlwind changes in the industry. For example, frontliners of the industry like hospital clinical managers and physicians have over the last few years been learning to juggle cost and quality. The complexity of seemingly commonplace discussions such as medical product selection and purchasing is magnified by the fact that empowerment to choose preferred products and suppliers has been rapidly slipping through the hands of the traditional customer and into those of the economic customer, like purchasing managers.

So, as a moderator, anticipate that topics like managed care or government cutbacks will tend to elicit a negative knee-jerk reaction. For example, not all physicians feel prepared for the changes in health care that require them to recalibrate their habits, practices and attitudes. It then makes sense that the physicians who are reluctantly confronting this reality tend to come into a related discussion with negative sentiments. You can sidestep this hurdle first by thinking through your line of questioning to ease participants into a potentially controversial discussion. Second, acknowledge and empathize with the challenges participants face. Consider using your warm-up questions to allow participants to vent their concerns, thus enabling you to later shift the discussion to the critical client objectives.

Not surprisingly, much consumer sentiment mirrors what we hear from the provider side. Over the last few years, consumer focus groups have revealed an increased level of concern about the direction in which people perceive our health care system is headed. In fact, a recent American Hospital Association focus group study[1] highlighted the U.S. consumer's growing skepticism of the "corporatization of health care." The lay press has further spread cause for distress by featuring articles on anecdotal "drive-through deliveries" and surgical horror stories.

This means that we moderators have a tough crowd with whom to discuss health care issues. How do you talk with seniors not currently in an HMO about a new HMO product when much of what they read about managed care is negative? What about talking to local residents about an impending merger of two hospitals, when fumbled mergers in the banking industry have bred consumer pessimism?

This is not to say all focus groups about health care will take a negative slant. We have heard very positive comments from extremely satisfied HMO members. Still, the first step is carefully considering the flow of the discussion guide to prepare for potentially controversial topics. Make your way through the thicket by approaching the same critical questions or issues from a couple different angles throughout the discussion. This can help discern the difference between biased initial resistance and true product or concept shortfalls. Take note of how respondents open up or change their minds during the discussion, because this can help your client overcome the same issues in the marketplace.

Facilitate to articulate

There are times when moderators are challenged with discussing a topic to which participants do not normally give much consideration. For example, testing advertising concepts with a group of internal medicine sub-specialists. As physicians, these types of participants tend to be very focused, left-brained thinkers who rarely are engaged by advertising. When asked point blank to compare two advertisements, physicians might give responses like, "It's okay," or "Good." These answers won't help your client or agency creative director eagerly watching behind the glass.

When charged with this task recently, our firm designed a progression of questions to facilitate a more enlightened discussion on medical product advertising. First, we showed concept boards for the client's new campaign (without revealing the client's identity) to gain initial reactions. It was clear that the group was having a difficult time articulating what they liked about the ads and how the ads compared to others currently running. Then we asked participants to imagine the sponsor of these ads was an automobile manufacturer and identify which manufacturer that would be. This enabled us to get down to participants' real feelings and move beyond strictly literal comments we might traditionally hear.

Free association (such as asking participants to compare the image of the client's product to something commonplace like cars), written exercises and other creative techniques can really make the difference in the way your participants articulate their thoughts. Also, factoring down these types of topics into incremental discussion steps frequently yields more insightful and articulate comments than head-on questioning.

In talking with consumers, the difficulty lies in the fact that participants sometimes are misinformed or don't understand how health care really works. This gives us a challenging balance to maintain; we must help respondents articulate intricate ideas without biasing their opinions or putting words into their mouths. For instance, when consumers say they are looking for quality health care, ask them how they define quality. What is quality? I have heard everything from industry accreditation, to a doctor with good listening skills, to a full waiting room (if this many people go to him, why shouldn't I?) The point is, there is a lot of confusion we need to sift through to better understand what our participants really mean in their response.

Exploration or true discovery

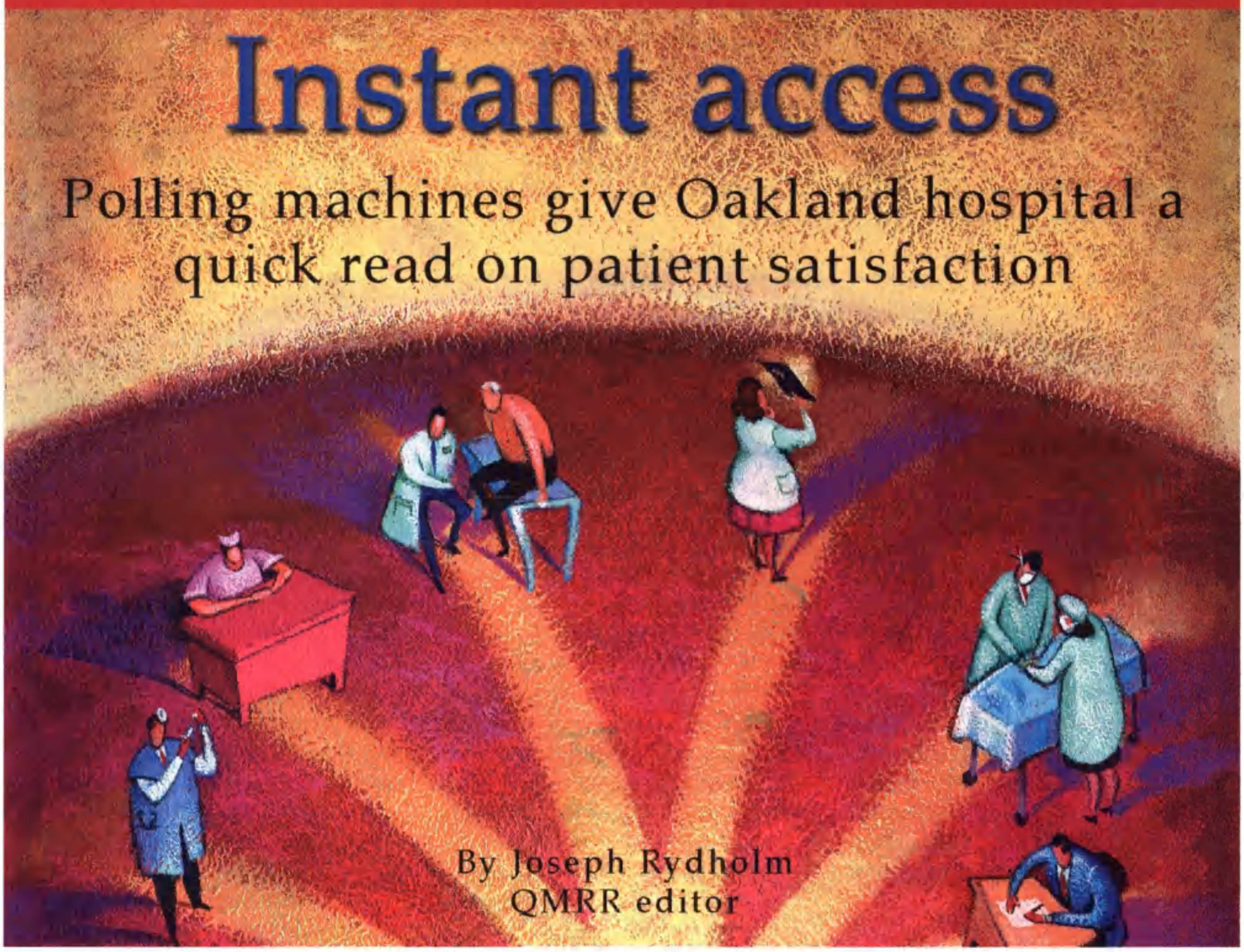
Some focus groups are nothing more than straightforward concept testing or brainstorming sessions. Group discussions are often a great intermediate checkpoint with customers for member retention or to stay ahead of the industry curve. However, when taking on anything that requires a more refined level of detail, remember to pack your scuba gear. It can make the difference between mere exploration and true discovery. ❑

[1]"Eye on Patients: A Report to the American Public." American Hospital Association and The Picker Institute. (January 27, 1997). Obtained from an AHA report press release.

Instant access

Polling machines give Oakland hospital a quick read on patient satisfaction

By Joseph Rydholm
QMRR editor



The ongoing patient satisfaction survey has become a staple of the health care industry's efforts to gather data on provider performance and identify service areas needing improvement. While these surveys provide a valuable historical measure, they often lack immediacy. Patients are asked to rate and remember events that may have occurred weeks or months ago. In addition, unless a more timely method of gauging patient satisfaction is in place, the lag time between survey administration and analysis may cost the organization valuable time that could be used to correct small service problems before they become major issues.

For one health care provider, a way to get immediate feedback from patients is by using an Opinionmeter, a stand-alone polling machine made by Opinionmeter, Inc., Berkeley, Calif. John Maio, manager of diagnostic imaging, Kaiser Permanente Hospital, Oakland, Calif., has used Opinionmeters to gather patient satisfaction information and also for employee surveys. Placing the survey machines in the waiting areas of various departments, Maio has collected patient responses to brief questionnaires about their just-completed visit. "When I saw the Opinionmeter demonstrated, it occurred to me that I could get rich data at the point of service, as opposed to data from a questionnaire that is mailed out to people a long after their interaction with hospital staff," Maio says.

"We get six-month-old data from member patient satisfaction surveys that are used across the region, which includes 2.5 million members, spread across 23 different facilities. Well, that's pretty tough to work on because I don't know what has happened since the time the survey was taken. With the Opinionmeter, I can get information and try to act on it immediately."

For example, as part of the center's New Practice Models customer service effort, Maio met with members of the pediatrics department at the Oakland facility to identify things the staff could do to improve patient satisfaction. "We devised a survey to be administered on the Opinionmeter that had four basic questions: Were the receptionists helpful and courteous? Did the nurses introduce themselves to you? If your appointment ran late, were you kept informed? And, what did you think about your overall visit, using A — needs improvement; B — met my expectations; C — exceeded my expectations," Maio says.

The short questionnaire was displayed on a panel attached to the Opinionmeter. Respondents used the keypad below it to enter their responses. In two weeks, Maio received 300 responses on one Opinionmeter, 184 on another and 225 on a machine in his own department, which he used as a control to show staffers that the high response numbers weren't just from kids pressing the machines' buttons.

(If a patient enters responses outside the range of possible answers, their survey won't be recorded. In addition, if a respondent doesn't complete the survey, the responses won't be saved. "You can also require people to enter their ZIP code or medical record number, for example, so if kids are pressing the buttons, it's not going to correlate to an active patient and you can just throw that response out," Maio says.)

Introductions are important

The survey showed that even something as simple as a doctor or nurse introducing themselves seems to have a strong effect on satisfaction. "Of all the patients who were introduced, I looked at their answers to the other questions and their satisfaction levels in those areas were about 40 percent higher than those who said nobody introduced themselves," Maio says.

"It was interesting to crosstab the responses of those who were happy with the service and those who weren't because you could see the answers to the questions that made them formulate their opinion. Of those who liked the service, 90 percent were introduced to the nurse, 90 percent had someone follow up with them if their appointment was running late, 90 percent said receptionists were helpful and courteous. So it's pretty easy to deduce that if you want to have high patient satisfaction these are the areas that can contribute to that."

He was also able to refute employee claims that only disgruntled patients take the time to do the survey, seeing it as a way to vent their displeasure. "The remarkable thing was, 67 percent said their visit was satisfactory or exceptional, and only 33 percent said it wasn't."

When he's preparing to place an Opinionmeter in a department waiting room, Maio says he tells the staff what the survey focuses on, rewarding them if they can raise satisfaction to certain levels.

"It's like a test where the professor gives you the answers beforehand. I don't want people to have to guess how to change their behavior, I'd rather tell them, 'Here's the answer and let's see how good you can do at it.' "

Employee surveys

The Opinionmeters have been valuable for employee surveys as well, Maio says. He places the survey machine in his office, facing it away from him so employees know he can't see what their responses are. "The meter is pointed away from me. It doesn't emit any sounds that let me know which buttons they're pressing. They complete the survey and they check their name off the list and go. I tell them I'm not interested in an individual's answers, I'm interested in overall numbers."

He's tried other methods, such as having employees E-mail comments to him, but employees are understandably nervous about anything with their name attached to it. "In the past, people didn't want to say anything about co-workers or managers for fear of retribution. But now I can get good data on what the whole department is saying and the areas that these people need to work on. It's a good way to get people to give me information on anonymous basis that I can use to make their work environment better and to make patients' lives better."

Maio knows there is the chance that some employees might stack the deck against co-workers whom they dislike. He also knows that employees could secretly complete surveys to make their own performance look good. So he tries to ensure a large sample.

"By and large, people have been surprised. They were afraid fellow employees would rip them to shreds but people actually have good things to say. If you use it as much for a reward as you do for trying to improve things, it's a great tool."

Positive comments

One outgrowth of the initial experience with the Opinionmeter was devising a vehicle for employees and patients to make positive comments about staffers. Now, specially labeled phones near some reception areas go to a voice mailbox, where callers are instructed to leave their comments. The messages are later printed and displayed and also placed in the employee's file.

"The comment system been well received, because there was no mechanism like it before. In many cases when you do employee evaluations, only the bad things are documented. This is a way to note when someone does something good and keep a record of it in their file."

Rather than seeing the Opinionmeter as a watchdog or a test of employee performance, Maio views it as a part of his effort to serve both the medical center's customers and its employees. "I have 116 employees in my department, and we do about 170,000 imaging cases per year, so it helps me show the staff how focused I am on finding out what patients want, and to have them understand that I'm focused on what they as employees want from me.

"In my position, I'm supposed to have vision and leadership capabilities. I think the important thing is letting the staff know that basically I'm their secretary. They need to tell me what's going to make their job easier. I'll filter that with my own vision and we'll move ahead together. Unless I do that and show them that I'm interested in their work environment, there's no way I'm going to get them to change their behavior." ❑

Standardizing health care satisfaction measurement

Jury still out on mail- and phone-based data collection methodologies

By Sherri Cross

Editor's note: Sherri Cross is manager of public relations with National Research Corp., a Lincoln, Neb., firm specializing in providing market information to health care organizations.

Within recent years as constituencies inside and outside the health care industry sought to provide a more tangible definition of quality care, satisfaction measurement has earned a pivotal role. The Joint Commission on the Accreditation of Healthcare Organizations has long required hospitals seeking accreditation to assess patient satisfaction levels. Similarly, initiatives introduced by the National Committee for Quality Assurance (NCQA), the preeminent accrediting body of HMOs, influenced health plans to begin measuring the satisfaction levels of their membership. These industry mandates are aimed at making customer satisfaction measurement a key component within organizations' quality improvement efforts. Findings, however, also made their way to health care organizations' marketing departments, with growing numbers publicizing their satisfaction levels. Yet, seen by some as a marketing ploy, these satisfaction scores lacked comparability and meaning as measurement approaches lacked standardization.

The NCQA led the crusade for a standardized health plan member satisfaction initiative. In 1995, the NCQA drafted a pilot instrument and recommended health plans use a third-party firm to conduct the mail-based survey process on their behalf. Associated with Health Plan Employer Data and Information Set (HEDIS) version 2.5 reporting, this pilot phase directed the NCQA's survey refinement of methodological specifications last fall.

Among the methodology issues explored, the pilot study response rates achieved through mail data collection fell short of the NCQA's stipulated rate of 50 percent. The second of two reliability and validity studies conducted by National Research Corporation and the Health Institute found response rates ranging from 35 to 73 percent, or an average 44 percent response rate (1996). This led to the recommendation that the response rate specification be lowered to 40 percent, shown to provide valid findings. The NCQA's Committee for Performance Measurement, charged with finalizing instrument standards for the HEDIS 3.0 release, weighed the implications of the suggested change given the need to have industry buy-in to further substantiate the initiative as the industry standard.

Understandable debate arose about the most appropriate survey methodology — phone or mail — to pursue. Regardless of the outcome, a decision for either methodology relied on a defensible position shared by peers within the health care industry and the greater public — a notable concern, given that health care executives are seven times more likely to endorse phone surveys as being superior to mail for satisfaction studies (Response Center 1995).

Yet, while the NCQA's Committee for Performance Measurement seemed to be wavering, the Health Care Financing Administration (HCFA) together with the Agency for Health Care Policy and Research (AHCPR) announced specifications for a mail administered Medicare Managed Care Beneficiary Satisfaction Survey (AHCPR's Medicare version of its Consumer Assessments of Health Plans Survey). In fact, HCFA set forth a response rate aiming for 70 percent of surveyed Medicare Risk or Cost plan beneficiaries. HCFA specified necessary telephone follow-up to achieve this response rate target. An independent vendor will conduct the Medicare CAHPS study this summer, sure to add fuel to this long-standing methodological debate.

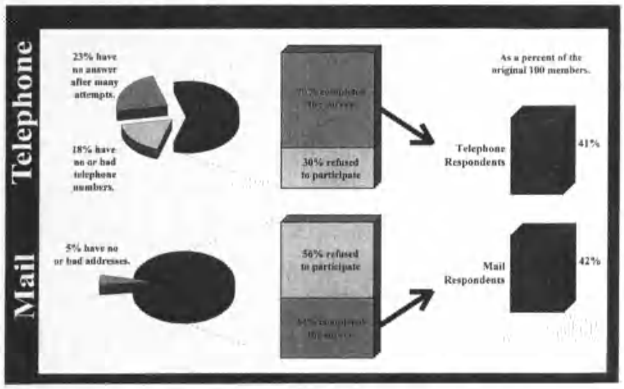
Worth mentioning, the Joint Commission on Accreditation of Healthcare Organizations' ORYX initiative is the most recent driving force behind standardizing performance measurement, including clinical outcomes and satisfaction. The Joint Commission will inevitably enter the methodological debate on many fronts, as it approves measurement systems health care organizations can contract with to meet new accreditation standards.

A look at how response rates are derived

Despite multiple recommendations that mail data collection become a standardized survey administration practice, this methodology still has its skeptics. Phone-based data collection, whether from experience or expectation, has generated a loyal following of proponents attesting to its strong response rate record. Face validity alone seems to suggest phone's achievement of higher response rates than mail. Looking for validation, the NCQA fielded a phone pilot study that would seem to support what many presumed to be true. Response rates achieved were in the range of 70 percent (NCQA phone-based studies, 9/96), surpassing the 44 percent average response rate shown to be achievable by mail (National Research Corporation and Ware, 9/96).

However, these numbers do not represent an apples-to-apples comparison of methodology effectiveness. The chart illustrates how the mail response rate reflects a percentage of total membership, while the phone percentage represents those members who answered a phone call. In essence, the perceived advantage of a higher phone response rate equates to the oversight of eliminating those members not given the opportunity to express their views. Thus, contrary to popular belief, both data collection methodologies achieved similar, rather than vastly different, response levels.

A Comparison of Data Collection Methods:
What Occurs Per 100 Members Surveyed?



Looking to existing survey research for justification/evidence

Long-standing analysis of trends within the survey research industry provides insights into the methodological issues faced by health care's performance measurement standardization movement. A more exhaustive review of phone data collection, the Respondent Cooperation and Industry Image Survey, tracked phone response rates for the past two decades and documents a current figure of 40 percent (The Council for Marketing and Opinion Research 6/96). This study also reported steadily climbing refusal rates, with 58 percent of those called refusing to participate.

Reflective of this well-established trend, phone products such as answering machines and Caller ID continue to affect response rates. Sixty-eight percent of households have answering machines and half use them to screen their calls. Caller ID shows steady growth with subscribers in 10 percent of households and another 11 percent planning to add this service. Another survey research study supports these findings, adding that 56 percent of current Caller ID subscribers said they always or most of the time used the device to screen calls (Tecket and O'Neil Market Research - Fall 1996). Similarly, telecommunication trends including multiple phone line households, phone number portability and changing area codes will continue to affect phone-based data collection by altering such things as rates of answered lines, unlisted numbers and working phones.

Mail-based data collection suffers from its own unique obstacles. According to the U.S. Postal Service, bad addresses on average produce a 3 to 5 percent nondeliverable rate nationwide. The currency of mailing lists and ZIP code changes contribute to higher percentages of nondeliverables. However, when comparing no/bad addresses to no/bad phone numbers, National Research Corporation's health care industry specific experience shows a 5 percent mail-based nondeliverable rate to be negligible when compared to phone's 18 percent.

Survey research indicates consumers are most comfortable with mail data collection. When asked, 46 percent of consumers said they preferred mail, while 26 percent advocated phone, 18 percent cited in-person formats and 7 percent favored group discussion (CMOR 6/96). Without supporting evidence, the assumption that health care's topical nature nullifies existing response rate trends remains unsubstantiated.

Beyond response rates — weighing other factors

Methodological alternatives utilized within the health care industry cannot fully be weighed on response rate alone, as numerous factors impact the actionability of information collected. Health care consumers have been shown to report higher satisfaction levels when collected by telephone vs. mail (Medical Outcomes 1/95). Holding this bias constant, effects on satisfaction scores may present no substantial concerns. However, telephone data collection results in higher reported health status and under-reported chronic conditions conveying a dangerously flawed picture to health care organizations (Medical Outcomes 1/95). Perhaps the most direct threat to the goal of a standardized instrument, widely-recognized phone interviewer introduced biases, are yet another variable for which to control. While an auditing system could control for the majority of these protocols, this method has not yet been shown to mitigate interviewer bias.

Conversely, as national reports estimate that nearly one-third of Americans do not have a clear understanding of managed care, phone data collection allows interviewers to probe consumer responses and personally address confusing subjects. This issue may find particular relevance to seniors, as Medicare privatization and coverage options easily blur payer specifics. Field testing instruments, however, by phone or mail can identify those measures requiring modification to facilitate respondents' accurate interpretation and understanding.

The methodological debate inevitably must factor in cost considerations. As growing numbers of industry and government bodies mandate the reporting of performance information, health care organizations must reallocate resources to satisfy these requirements. Managed care organizations, particularly the smaller players, have argued a tighter regulatory environment will jeopardize the availability of services and affordability of coverage. Given the Health Care Financing Administration's estimates, Medicare risk and cost managed care plans may incur from $7,000 to $9,800 per contract area to comply with the 1997 implemented beneficiary satisfaction survey. This cost adds to the more than $500,000 to $1 million some health plans have projected they will spend for HEDIS 3.0 reporting, of which satisfaction measurement represents only one component driving expenditures. In fact, as NCQA requires health plans to show performance improvements, ongoing satisfaction measurement requires a sizable financial investment. Thus, the 50 to 100 percent higher costs involved with phone data collection cannot go overlooked.

Methodological stance within the standardization arena

With 99 percent of HMOs and 80 percent of PPOs measuring their memberships' satisfaction, the standardization movement will continue to direct how health care organizations' performance should be measured, reported and applied. Many health care organizations have opted to pursue a mail methodology with their internal, ongoing measurement initiatives to generate a unified performance perspective, as separate phone and mail data collection associated with a satisfaction measurement program can deliver conflicting data sets. Thus, the stance of industry players including the NCQA and HCFA on mail data collection has and will create followers. Therefore, given the standardization movement's current progress and the survey research industry's current findings, key indicators suggest mail data collection represents a sound course to maintain. ❑

Survey Monitor

continued from p. 6

known to only 8 percent of the American public."

Four out of the 10 most widely recognized sports brands come from the athletic footwear market — Nike (92 percent), Reebok (92 percent), L.A. Gear (89 percent) and Keds (81 percent). However, between 1993 and 1996 the Fila brand has skyrocketed in awareness from 34 percent to 50 percent, and is currently owned by 10 percent of the U.S. population over the age of 13.

While Fila now ranks third in market share, its 50 percent awareness rating is good enough for only eighth place, falling behind Nike, Reebok, LA. Gear, Keds, adidas, Converse and Puma in national recognition. According to ASD, brand awareness is clearly a cumulative phenomenon, with older names lingering in the public mind long after the brand's peak market performances.

The Sports Brand Intelligence Report is based on a national survey of 3,895 people aged 13 and over conducted in December 1996. For more information call 914-328-8877.

AIDED BRAND AWARENESS (Top 10 Overall)

1. Fruit-Of-The-Loom	94%
2. Nike	92%
3. Reebok	92%
4. Hanes	92%
5. Levi-Strauss	91%
6. L.A. Gear	89%
7. NordicTrack	87%
8. Timex	86%
9. Spalding	83%
10. Keds	81%

Top 10 tips for selling to the mature market

Why would any company care about the mature market? Maybe it's because mature Americans hold 50 percent of all discretionary income and 77 percent of total financial assets in the United States. The mature spend more than $1 trillion on products and services every year and that number will continue to grow as one baby boomer turns 50 every 7.5 seconds for the next 18 years.

According to Frank Conaway, president/CEO Primelife, a mature market communications consulting firm based in Orange, Calif., the top 10 considerations (in no particular order) for marketing to the mature are:

10. Avoid stereotyping. The mature market is extremely diverse. Just because they've passed their 50th birthday doesn't mean they've tripped into senility, are hard of hearing or forgot how to color-coordinate their clothing. Conservatives, for the most part, they can still be influenced by effective advertising and public relations. Collectively, they're far from being poor. As the last generation to enjoy personalized relationships with people who sold them goods and services, they buy on an emotional level and they still hold traditional values.

9. Get to the point. This generation survived the Great Depression and fought the big fight so they're not afraid of confrontation. Don't beat around the bush and don't lie. They'll never forget it if you do. They still remember what the word "ethics" means and recognize a lack of it. This is the first generation that really grew up with the media. They heard the sales pitches on radio and graduated to black and white televisions without a look back. There's nothing they haven't heard of or been promised, so it's hard to fool them. And, despite what some marketers think, many of the mature have embraced the computer from the beginning as they now eagerly surf the Web in search of the new and interesting. So get to the point and don't try to camouflage it in hyperbole.

8. Speak their language. The mature consumer's values aren't all that complicated. While they may have had their own jargon at work, at home they like to hear their own language, namely non-tech talk. Whether you're selling a computer system or a car, don't talk down and don't talk up, just talk straight at them. They're not stupid, so you don't have to use monosyllabic words; but try to tone down the advertisingese.

7. Don't patronize. It's been a long time since they were children, so don't treat them like youngsters. And just because some of them are beginning to sport white hair and wrinkles doesn't necessarily mean their brains have

slipped into neutral. If they happen to be with their grown children, don't assume the child speaks for the parent. The mature have worked all their lives, they're still proud of what they've contributed to country and home, so they consider themselves equals. Being talked to in a condescending manner will turn them off and you may never regain their respect or their business.

6. Educate as you explain. The mature have always been a part of the information age. Unlike many members of succeeding generations, they know what the printed word looks like between the covers of a book. They are truly the first multi-taskers, having struggled to raise families, hold down jobs and get their college degrees. Now, just because they've crossed the threshold of 50, they haven't stopped seeking out information. They're still ravenous readers, moviegoers and television watchers. All this means they are more than receptive to your messages. Don't be afraid to explain your product or service. The mature know from experience that the better informed they are the better choices they'll make.

5. Provide simple-to-read literature. Simple doesn't mean simple. Simple means easy to read. While the mature may cling to their youthful ways as long as they can, the fact is, the eyes need a bit more help the older they get. So responding to natural physical changes is just smart business. Increase the type size on labels, use contrasting colors, stay away from fancy fonts and clutter.

4. Be positive but not pushy. One thing the mature have is experience. And lots of it. All those years of living have taught them a thing or two about rushing into a decision without mulling it over. So, they're in no hurry to make a decision that's going to cost them money. And the more you push, the more they're apt to take their business elsewhere. Give them the information they need to make a wise choice. Stress solutions, not problems, and give them time to make the choice that's best for them. And what's best for them could be good for you too.

3. Instill trust: Remember that word "ethics?" You better reek of ethics and integrity. This generation has literally put their lives on the line based on trust of their fellow man as well as their coun-

try. They've been disappointed many times and take it very personally. You lose their trust and you lose them forever — then they'll tell all their friends you can't be trusted! And they have a lot of friends.

2. Get personal. The mature are the pre-television generation. In other words, they're the last of the personal communicators, those who talked over the backyard fence rather than the cell phone. They shopped at local markets, had milk delivered to their doorsteps and were on a first-name basis with the mechanic who worked on their cars. They know their neighbors and have a network of friendships going back 40 years or more. They've built their personal lives and businesses on relationships. The quicker you're able to build a relationship on any level, the better you'll be able to gain and keep their business. You may not wash their windshields as you pump their gas, but any modicum of full-service these days is still appreciated.

1. Segment and subsegment. Not everyone over the age of 50 belongs to the same generation, so you can't lump them all together in one simple marketing plan. Some of these people voted for Roosevelt — all four times. Others took their 2.5 kids to Disneyland when it opened in 1952. This is a very diversified group and each segment has different wants and needs. And each age segment can be further subdivided by income, ethnicity, health, discretionary time and hundreds of other ways. In this case smaller (segments) is bigger (opportunities) when targeting the mature market.

No list about people can ever be complete. You can never know everything there is to know about a person or group of people. No matter the age, people continue to grow, to change and to head off into uncharted territories. That's why this top 10 list, or any other list, has a limited life span. For more information call 714-744-1291.

Why not put it off?

When it comes to doing their taxes, a sizable number of taxpayers feel like Scarlett O'Hara — tomorrow is another day. A nationwide survey, conducted for *Men's Health* magazine by Opinion Research Corporation during March 27-29, reveals that one-fifth of taxpayers (20 percent) admitted to putting off doing their taxes this year.

Why do taxpayers wait until the last minute? According to those questioned from a list of possible reasons, the most frequently cited reason was that they were simply too busy with work and family life to make time for doing their taxes. Among those who put off doing their taxes, 51 percent say that their busy family and work life was the primary reason for their procrastination.

Among other reasons cited for putting off doing taxes were not having information organized properly (28 percent); fear of how much they might owe the IRS (21 percent); and not being able to find the time to sit down with their spouse and review yearly costs (18 percent).

Interestingly, only 8 percent of those who put off doing their taxes state that the reason was difficulty understanding the IRS forms.

The survey finds that Americans aged 35-44, a large segment of the baby boom generation, are among the biggest numbers of individuals to put off doing their taxes. In fact, 29 percent of this group say they procrastinate when it comes to doing their taxes. Conversely, those Americans at the top and bottom of the age scale, (18-24 and, 65 and older) are much more likely to get their taxes done, with only 12 percent of these groups admitting to putting off their tax work.

Not surprising, those individuals earning higher annual incomes ($35-$50K and $50K or more) were among the highest percentage of those who put off doing taxes, with 26 percent and 24 percent of these groups, respectively, admitting as such. Those on the lower end of the wage scale (earning under $15K per year) were among those least likely to put off tax preparation, with only 15 percent of this group stating as such.

Similarly, college graduates, who are more likely to be among the higher income groups, were more prone to put off doing their taxes than those individuals without a high school degree (27 percent vs. 12 percent).

When given a list of possibilities, 47 percent of Americans say they put off doing household chores or yard work and, 43 percent say they put off shopping for holiday gifts until the last minute.

Among the other activities that Americans would rather not do until the last minute include scheduling doctor or dentist appointments (35 percent); calling relatives such as in-laws (31 percent); getting the oil changed in the car (29 percent); and buying anniversary gifts for their spouse or significant other (26 percent).

When it comes to being the bigger procrastinator, men are much more likely to admit to putting things off then women. According to the survey, 54 percent of men say they are more likely to put things off than their spouse or significant other, In comparison. only 27 percent of women admit as such. In fact, 47 percent agree that their husband is the bigger procrastinator in the family.

Among women, doing household chores or yard work was the most frequently cited activity they tend to put off with 50 percent stating as such. Among men, shopping for holiday gifts topped the list of activities they would rather put off, with 50 percent stating as such. This is also the case for younger individuals (18-24) with 53 percent of this group admitting to putting off holiday gift buying compared to only 26 percent of those aged 65 and older.

Men are also more likely than women (31 percent to 22 percent) to put off buying an anniversary gift for their spouse, and calling a relative such as an in-law (37 percent vs. 26 percent).

Younger individuals, those aged 18-24, are among the biggest procrastinators in marriages, with 50 percent of this group saying they are more likely to put things off. In comparison, 34 percent of those aged 45-54 say they are more likely to put things off than their spouse.

Individuals from Western states admit they are more likely to put things off (45 percent) than their spouse compared to those in relationships in North-east, where 36 percent of individuals admitted as such.

The survey is based on a nationwide telephone survey of 1,006 randomly selected adults, aged 18 and older. The survey has a margin of error of ±3 percent. For more information call 610-967-5171.

Brand loyalty assumes new forms

Marketers who wondered if recession-born price shopping would kill brands should rethink their pessimism, advised market researcher Judith Langer in a speech to the Advertising Research Foundation Annual Conference in April. While "100 percent brand loyalty is in the past," said Langer, president of Langer Associates, a New York firm specializing in qualitative research studies of consumer lifestyle issues, consumer attachment to brands remains potent. "A number of consumers like, even love, brands," she said, although their loyalty is assuming new forms.

Brands remain important to consumers because they satisfy practical, emotional and social needs, Langer said. Practical, because it's reassuring to buy consistent, known quality which saves "time, money, disappointment and even self-blame," she noted. On the emotional level, brands evoke continuity, sometimes even across generations. They also serve a social role as a shorthand communication of self that "can win acceptance and approval or at the very least, avoid disapproval."

Major elements in continuing and new brand loyalties uncovered by Langer and her associate Naomi Brody in focus groups and depth interviews include:

• Consumers are not as cynical as they are sometimes portrayed. They remain loyal to brands that have lasted, and to companies which support their brands with service and respect for the consumer. One consumer said, Sony has "customer relations lines and they take your complaints and help you." A personal letter of apology and dollars-off coupons from Snapple turned around one disgruntled customer. "Unconcerned and unresponsive customer service, however, can lose customers forever," Langer warned.

• In an era of increasing change and uncertainty, nostalgia plays a growing role in brand loyalty across age groups. Said one consumer, "I've used Tide forever — my mother used Tide and when I got married, it didn't occur to me to use anything but Tide." Food, too, stirs memories. "Mother thought Hellman's mayonnaise was the brand for us," said another consumer. "I have deviated and gotten other brands, but it doesn't taste like Mom's cooking."

• Brands are increasingly seen as a way of belonging to a "club," among purchasers of products as varied as New Balance athletic shoes, Gateway 2000 computers and regional beers. Swatch and Saturn offer formal clubs for product owners, but Langer found a growing number of informal connections among brand loyalists. A woman who bought a Gateway computer said, "The minute these cartons hit the lobby of my building, suddenly I had everyone in my building who had one telling me what to do. It became a definite community, a subgroup of people."

• Many consumers today practice home-base loyalty (leaving and returning to a favorite brand after experimenting with other products), and dual loyalty (rotating between two brands depending on price or benefits). In both styles, consumers have a strong relationship with brands, if not 100 percent loyalty.

Consumer behavior can be seen clustering into "loyalty segments," according to Langer, and marketers need to understand these segments so they'll know how to talk to their customers.

The Steadfasts are people who "declare their loyalty to a particular brand as a sign of strength of character." They say, "Why change if there's no reason to?" While some are middle-aged, others are younger and continuing relationships with brands from childhood or that they have established on their own. Typical comments: "I'm fairly brand loyal. I don't like change. Once I've found something I like, I stick with it, if it's been good to me." Or "I consider myself a thoroughly dependable person, that's why I like a dependable product."

Loyalty Minimizers consider themselves smart shoppers and open to change. "It just happens that in a number of categories," Langer said, "they repeatedly buy their old favorites nine times out of 10." Their patterns include both home-base loyalty and dual loyalty: one man said he was loyal to both Kodak and Fuji and swung between the two depending on price.

Category Contingents reserve their loyalty for a particular category of products. If a product is important to them and they see a difference among brands, they'll buy one brand consistently, but in other areas, they do not.

Image Rejectors "care only about product characteristics and price" and "refuse to pay more for a fancy brand name," said Langer. "Store brands are fine in many categories, they insist."

Don't take consumers' loyalty for granted, not even that of 50-plussers, warned Langer. "Even the Steadfasts will walk away if the quality drops significantly or the new advertising alienates them. They'll try new or different brands which offer better value, interesting benefits or image enhancement.

"Start with youth in building brands. The brands that make an impression on children, teenagers and young adults will often be selected by them as adults." Or reach them through their parents, suggested Langer: "Habits and loyalties are passed down."

The message to marketers from the consumer is very simple, said Langer: Make me feel good about myself — smart, chic, sophisticated, tasteful, successful, mainstream, an individual, frugal, a good parent — or whatever that person is seeking. "Brands that do this will attract and keep a good deal of the business — if not the total loyalty — of their customers," she said.

The study reported above is based on a focus group of men and women 35-65 years old held in New York City in January, followed by 20 in-depth telephone interviews conducted by Langer Associates Inc. For more information call Anita Hunter at 212-355-0365.

Asian-Indian consumers enjoy visiting family, friends

According to a new study, the favorite leisure time activity of Asian-Indian consumers living in the U.S. is visiting family and friends. The study, by Paradigm Technologies International, Westwood, N.J., surveyed a random sample of Asian-Indian consumers, aged 18 and over, on their preferences in a variety of goods and services and also gathered demographic information.

Japanese vehicles are favored above all other car makes, for both purchase and lease. Toyota is the favorite manufacturer. Most respondents expect the sticker price of their next purchased or leased vehicle to be above $20,000. Most plan to purchase or lease a vehicle within the next two years.

Frequent travel to India is widespread. Three out of four expect to make the trip at least once every five years. Air-India and Lufthansa are the most favored airlines for traveling to India.

More than three of four Asian-Indians have a computer at home. Most have access to on-line services and the Internet. Life insurance, mutual funds and IRAs are the most common investments. The median savings rate — savings as a percentage of income — of Asian-Indians is 14.7 percent, well above the American average savings rate of 4.2 percent.

Three out of five Asian-Indians are not vegetarians. More than two-thirds of respondents dine out at least once every two weeks. Pizza Hut is their top choice among restaurants. Two-thirds eat breakfast cereals regularly, with Kellogg's being the favorite cereal maker of most respondents.

Almost three out of five use AT&T as their primary carrier. Brand loyalty is strong; most will not change. The median monthly local/long distance phone bill is $54. The median monthly bill for international calls is $69.

Most Asian-Indians prefer hard news content for both reading and television viewing. *India Abroad* is the most commonly read Indian-oriented publication.

About two out of five attend religious services at a place of worship one to three times per quarter. Children's education and financial stability are the two most commonly cited socio-economic concerns.

Three out of five respondents live in a single-family house. Almost all adult Asian-Indians are bilingual, with Hindi the primary non-English language. The vast majority of American-based Indians were born in India. A third came originally from the states of Gujarat and Maharashtra. More than half have lived in the U.S. for over 10 years.

Almost three in four respondents earned a college degree or higher prior coming to the U.S. The most commonly cited occupation is engineer. One in five owns his or her own business. The median household size is three. Baby boomers comprise the largest age segment of Asian-Indians. Four out of five respondents are married. Median household income among Asian-Indians is almost twice the median for Americans as a whole: $64,000 compared to $34,000. For more information call Ravi Iyer at 201-722-3550.

Patients: doctors put cost above efficacy

One our of four patients believes that doctors prescribe drugs based more on cost considerations than effectiveness, regardless of whether those patients are involved in managed care or fee-for-service health plans, according to a survey by CDB Research & Consulting Inc., New York.

When it comes to insurance, the disadvantages of a managed care plan outweigh the inconvenience of paying for the medical service up front and subsequently filing a claim for reimbursement, the survey showed. In fact, the majority of those insured have fee-for-service insurance coverage as opposed to the copayment structure provided by managed care (53 percent fee-for-service vs. 43 percent managed care). This statistic holds true even among the older segment of the survey sample, an age group that on average has less disposable income. For instance, twice as many people over the age of 65 have fee-for-service plans than have managed care plans (26 percent fee-for-service vs. 12 percent managed care). Managed care plans, however, are more popular among the 35-44 age group (29 percent managed care vs. 18 fee-for-service).

Those insured under managed care are an average of nine percentage points less satisfied with their care than those insured under fee-for-service plans. For example, more people with fee-for-service insurance agree they have access to the best-qualified physicians (93 percent versus 81 percent), as well as the best-equipped hospitals and medical facilities (94 percent vs. 87 percent). The fee-for-service group also reports a greater flexibility in changing doctors than those covered by managed care (94 percent vs. 81 percent). In addition, the fee-for-service group finds it easier to process claims (92 percent fee-for-service vs. 83 percent managed care) and to obtain physician referrals (85 percent fee-for-service vs. 79 percent managed care).

Despite these discrepancies in the quality of service, the two insurance groups do share some common opinions. One out of four respondents agree that doctors prescribe drugs based more upon low cost than effectiveness (23 percent fee-for-service, 25 percent managed care). The majority of both groups also believe that the type of insurance plan does not prevent their doctors from offering the best care possible (84 percent fee-for-service, 83 percent managed care). Lastly, clients of both plans report that appointments may be scheduled easily without a lot of advance notice (85 percent fee-for-service, 83 percent managed care). For more information call 212-367-6866.

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QUEST services comprise Web surveys, E-mail surveys, on-line focus groups and proprietary client marketing research resource Web sites. For more information call 770-621-7600 or visit the company's Web site (http://www.elavidge.com) for a demonstration of E-Quest services.

Site features links to 3,000 magazines

Direct Contact Publishing, publisher of The U.S. All Media E-Mail Directory, has a new Web site featuring links to over 3,000 on-line magazine sites. The site's address is http://www.owt.com/dircon/mediajum.htm#Mediajump.

Packaging report from The Consumer Network

The 1997 Package Performance and Consumer Expectations Report is now available from The Consumer Network, Philadelphia. The report includes: findings about how consumers see and judge packaging; performance ratings on 16 food and 24 non-food categories; packaging suggestions; information on how improvements impact product satisfaction and the role of package performance in value perceptions. The report is based on two rounds of package research with 730 supermarket shoppers; best package nominations from 2,500 supermarket shoppers; the development of a Package Performance Index; and analysis and recommendations informed by packaging focus groups and workshops. For more information call Charles Ebner at 800-291-0100.

Saja updates Survey Select

Survey Select 1.5 survey development software is now available from Saja Software, Inc., Longmont, Colo. New features allow for the export of survey answers to a variety of spreadsheet and database programs, including Microsoft Excel and Access, and Lotus 1-2-3. Survey Select is a Windows-based product that allows users to administer surveys on hard copy, via stand-alone or networked PC or on diskette. The program features three modules: Survey Designer, Survey Administration and Survey Analysis. Users can create a survey from scratch or select from a question database. They can choose from a variety of rating scale types, including agree/disagree, open-ended, yes/no, multiple choice, true/false and others. Dual scales are also available. The Survey Designer module gives users a head start on survey design with eight pre-configured survey templates and more than 500 archived questions that are categorized by topic. After the survey is created and administered, the Survey Analysis module allows the user to compile and analyze the data in a variety of formats. Standard statistical information, graphics, open-ended question analysis (through a key-word search engine) and gap analysis are all available. A free demo of Survey Select 1.5 can be downloaded from Saja Software's site at http://www.surveyselect.com. For more information call 800-945-0040.

Software generates probability sample for Web research

Researchers looking to conduct a probability sample for Web research can now use Pop-Up Survey Software from SurveySite, Willowdale, Ontario. SurveySite software counts how many people visit a Web site and selects visitors at a predetermined interval (for example, every 100th visitor). When the Nth visitor browses the site, a small Java window pops into view asking the user if they would complete a short on-line survey after they finish browsing the site. The visitor can then complete the survey or decline to participate with a mouse click. For more information call Marshall Rice at 416-410-3457 or visit the company's Web site at www.surveysite.com.

New qualitative service goes where consumers are

Doyle Research Associates, Inc., Chicago, has introduced ShopTalk, a custom research service that conducts qualitative research wherever a client's product or service is used or sold, be it at home, an entertainment venue or in a retail environment. ShopTalk provides clients an opportunity to observe the unconscious behavior of consumers' routines, patterns and habits, rather than relying exclusively on self-reported behavior. For more information call Lynn Kaladjian at 312-944-4848.

Smart Viewer gives SPSS users viewing flexibility

SPSS Inc., Chicago, now offers SPSS Smart Viewer, a product that allows users to distribute reports "live" for further pivoting, viewing, formatting and printing. All vital information can now be electronically distributed in one file. Multiple reports can be condensed into a single table which can be reformatted and pivoted to suit the receiver's needs. Smart Viewer enables users to electronically publish SPSS for Windows output to their customers and colleagues. It provides instantaneous delivery of information via the World Wide Web, E-mail or diskette. For example, a company can distribute sales reports or employee satisfaction surveys to all department managers, allowing them to cut and shape reports to their own specifications. In addition to SPSS Smart Viewer, SPSS is also releasing SPSS Viewer, a view-only product which is downloadable from the SPSS Web site (http://www.spss.com). The SPSS Viewer is an easy, no-cost way for anyone to print or view SPSS results files on their desktop without owning or operating SPSS for Windows. For more information call 800-543-5815.

On-line focus groups, surveys from RCI

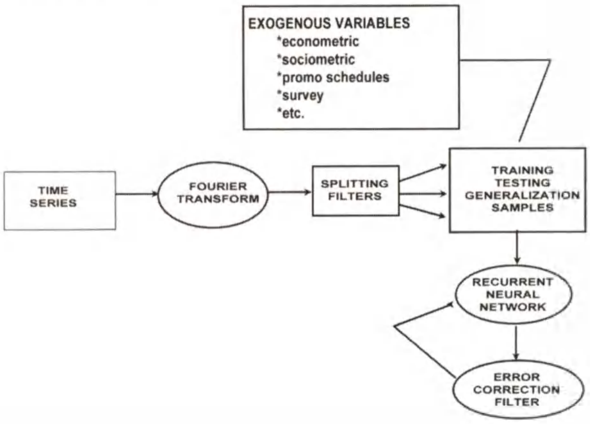
Research Connections, Inc. (RCI), Westfield, N.J., has introduced two new on-line research services, Focus Connect and Quest Connect. Focus Connect is a virtual focus group facility located at RCI's Web site. Using customized software, Focus Connect groups are conducted on a secure Web server so that participants can meet in cyberspace for virtually any research purpose. The on-line groups are password-protected so that only recruited respondents can participate in their assigned group. Participant comments are seen by the entire group while private messages can be sent to the moderator by individuals and client observers. In addition, managers at the client company who might not normally be able to attend location-dependent focus groups can log in from their offices to follow the groups. To view a demo, visit the company's Web site at http://www.researchconnections.com/focus.

With Quest Connect, RCI can deploy an on-line questionnaire, collect results and report them to clients within 24 hours. The surveys can be created to pose virtually any type of question with logic included for skip patterns, conditional branching, random question and answer rotations, ranking and multiple answers. Responses can also be checked for valid data such as whole vs. decimal numbers, constant sum calculations, numeric ranges and blank entries. Respondents are recruited on-line, by phone or E-mail as well as from RCI's respondent panel. The Quest Connect survey engine is based on standard Web page scripting language so surveys can be mounted on any Web server, either RCI's or the client's. Participants can take as much time as they like to complete the survey, but the survey engine ensures that each respondent answers every question. The results are collected automatically at the Web site and, in most cases, each day's results can be tabulated and transmitted to the client the day after they are collected. For an on-line demo, go to http://www.researchconnections.com/surveys/qc_demo.htm. Or for more information on both products call Amy Yoffie at 800-665-9724.

Data Use

continued from p. 15

FIGURE 2: MODEL ARCHITECTURE



1. The time series

You will recall from the first article that all that is necessary to build a supervised learning neural net are values of the input (or independent variables) and values of the output (or dependent variables). A neural network uses layers of processing units whose weights are iteratively adjusted until the network's prediction of the output variable(s), based on the input variable(s), is as close to the actual output variable(s) as possible. Once this state is reached, the network is said to be trained. With our time series data, we easily meet these conditions. We have input variables, generally previous values of the series; and output values, the value of the series at points in time later than the input series.

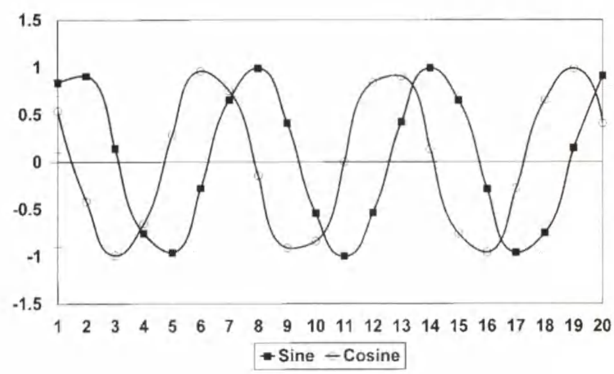
EXHIBIT 1: The Fourier Transform

$$W_j = \sum_{k=0}^{n-1}\left[x_k\cos\left(\frac{2\pi jk}{n}\right) + x_k\sin\left(\frac{2\pi jk}{n}\right) i\right]$$

2. Fourier transform

A Fourier transform is a very specific data transformation that reveals short- and long-term trends. The basic equation of the Fourier transformation is shown in Exhibit 1. For our purposes, the important thing to notice about Exhibit 1 is that the transformed series, W_j, is made up of sines and cosines of the original series, the X_ks. You will recall from high school trigonometry that the most outstanding feature of sines and cosines is that they are periodic — they repeat at very regular intervals, as shown in Figure 3 where we simply take the sine and cosine of the integers from 1 to 20. A Fourier transformation re-expresses the time series, no matter what it looks like originally, into a set of pure sine and cosine waves, thereby revealing any periodicity, or patterns that repeat at various intervals of time. Figure 4 shows a particular series of monthly data and Figure 5 shows a Fourier transformation of this data, revealing that the series contains three robust cycles: one that repeats every 12 months, another that repeats every six months, and a third that repeats every three months.

FIGURE 3: SINE AND COSINE



3. Splitting the signal

One of the important features of the Fourier transform is that once you've identified the various components of the series, like the slow 12-month and fast three-month cycles in Figure 4, you can do basic arithmetic on the series. For instance, you can split the original time series into two or three separate series, each with very specific attributes (like long-term trend) and model each of these series separately. The equal sign in the Fourier transformation means that once the series is split up into its basic components, adding all the components back together again results in the original series. Similarly, adding together forecasts based on each of the components results in a forecast for the entire series. This idea is fundamental to the neural network approach to forecasting: split the series into components having specific properties using the Fourier transform; train separate neural networks on each of the components; forecast future values of each of the separate components (since each component has a specific property, each will be ruthlessly precise); add the forecasts together and the equal sign in the Fourier transformation assures one of having a forecast of the raw time series, albeit a much better forecast than would ever have been achieved if you tried to forecast the raw signal rather than its constituents.

FIGURE 4: WAREHOUSE INVENTORY TIME SERIES

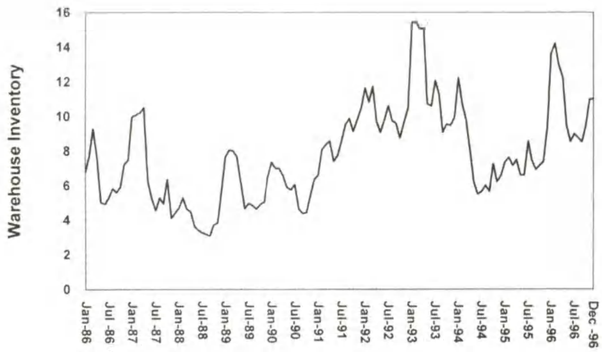
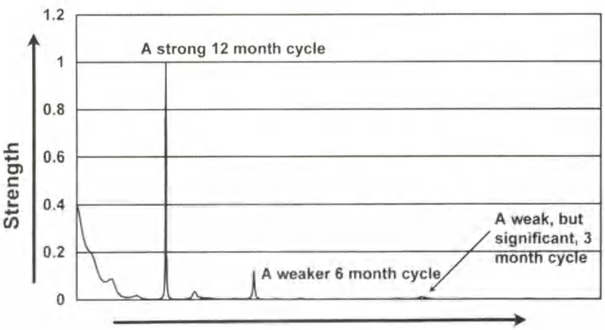


FIGURE 5: SPECTRAL COMPONENTS OF WAREHOUSE INVENTORY



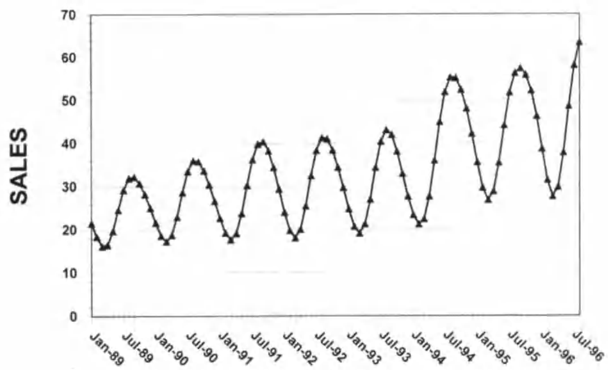
4. Splitting the series

Splitting the time series is done with filters. There are all kinds of filters, but the three that are the most useful to market research are highpass, lowpass and bandpass filters. The idea is very simple. A highpass filter of a time series only lets through those components that repeat at a certain high frequency. Conversely, a lowpass filter only lets through those components of a series that repeat at specific low frequencies. The low frequency components are long-term trend. Long-term trend occurs at low frequency because if you have a three-year trend in a database that spans six years, it will repeat with a frequency of two. If there is also a quarterly cycle in this data, it will repeat with a frequency of 24 times

— it is a much higher frequency than the three-year trend. The highpass components are quickly fluctuating, often times random noise, in the data. A bandpass filter is a combination of a lowpass and highpass filter, allowing through only components that repeat between a low and high cutoff point.

Once we know the spectral components of the series from the Fourier transformation, we can split our signal into a variety of pieces and train separate neural networks on each of the pieces. Some pieces, especially the lowpass component, are very easy for a neural network to learn. Other components will be more difficult. More importantly, though, external variables that we might wish to include in our model will selectively influence components of the signal. For instance, if we are forecasting demand for refrigerators, the number of new housing starts will probably effect the low frequency long-term trend component while price discounts, advertising and promotion, etc., will probably effect the higher frequency, more transient aspects, of the data. Splitting the series into components where external variables can differentially impact each of the components results in models of

FIGURE 6: LOWPASS FILTER



much greater precision (i.e., much higher R^2) and vastly more accurate forecasts.

Returning to our example, Figure 6 shows the output of a lowpass filter. The long-term trend in the data is now quite clear:

• Sales have a clear 12-month seasonality that peaks in July and troughs in February.

• Sales have been trending upward from 1989 to 1994.

• In 1994, something occurred to shift the curve upward such that the basic seasonality continues, but now around a higher baseline.

Even without a neural network, it is pretty easy to predict the August point of Figure 6.

Figure 7 shows some higher frequency, more transient, aspects of the series. Casual observation will convince you that even this high-frequency series is far from random. In fact, a neural network will have very little difficulty learning this series. Figure 8 shows the two series together. If you simply add the two lines together you will get Figure 1. Since these two series with very different properties are mixed together in Figure 1, it should

FIGURE 7: SIGNAL WITH LOWPASS REMOVED

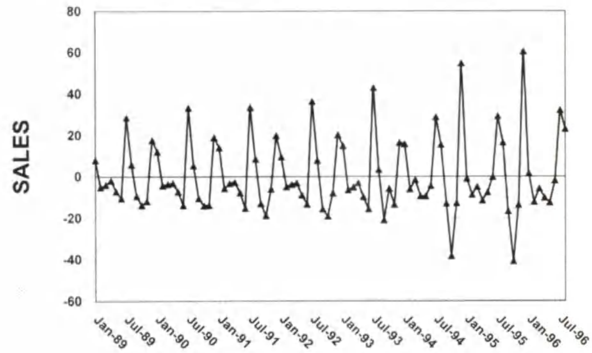
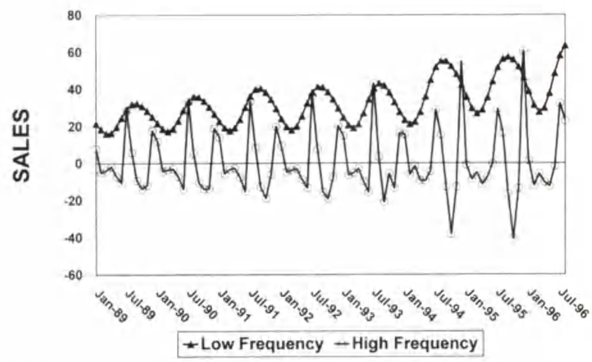


FIGURE 8: SPLIT SIGNAL



be obvious that forecasting each of the two filtered series is easier than forecasting the combined series. Moreover, the equal sign in the Fourier transform gives us a way to put the two forecasts back together. In this example, we have split the signal into only two pieces. It is not unusual to split a signal into four or six pieces. Knowing how many filters and how the filters should be set comes from studying the Fourier transform. For the signal shown in Figures 4 and 5, splitting into three pieces — a very low frequency cycle, an intermediate six-month cycle, and a high frequency series — is required.

5. Exogenous variables

Exogenous variables are variables that arise outside of a model. That is, the model does not describe their cause. In our refrigerator example, housing starts are exogenous since the model has nothing to say about what causes increases and decreases in housing starts.

We've already covered this in our discussion of why the Fourier transform is used. Frequently in market research forecasting, we want to know how other variables affect the series — how does price affect demand, how does advertising affect sales, and so forth. The neural net allows a simple way to factor all these variables, especially survey-based variables, into the model. As described above with refrigerator sales, part of the great beauty of the neural network approach to time series forecasting is that it allows exogenous variables to differentially impact various components of the series, a variable like customer satisfaction could be highly correlated with just a specific component of the series, but when you look at the correlation with the entire series, the relationship may be completely lost.

6. Training and test samples

At this point we're ready to actually build a neural net model from the data. We will have two distinct neural networks, one predicting long-term trend in sales and the other predicting the high frequency transients. As with any supervised learning network, we need two things in our data: values of the independent variables and values of the dependent variable(s). The network will learn a nonlinear mapping between the two. In a time series analysis, the data line is a little weird. To make what the network sees concrete, let's talk about the input for January 1995. The January 1995 data consists of three elements:

1. Since we want a four-month forecast, the January 1995 line would contain February, March, April and May 1995 sales. These are the dependent variables, the values the neural network will be trained to predict.

2. January 1994 to January 1995 sales. We will base each four-month forecast on sales of the previous 12 months so the value of sales in each of the previous 12 months is on the input line. This is part of the independent variable.

3. The value of the exogenous variables in January 1995. In this particular application, there are 16 exogenous variables as shown in Figure 9. This is part of the independent variable also. One could also add lagged values of the exogenous variables.

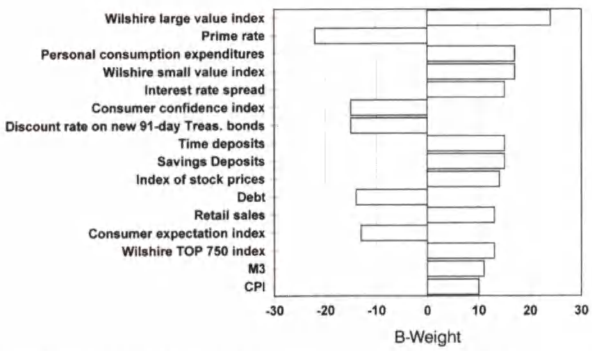
Each line of input contains 32 data values. We randomly split our data into two pools, a training pool and a testing pool. We will use the training pool to train the network, and we will use the testing pool to see how well it does with data its never seen before.

7. Recurrent neural network

We can now train our network using the technique of back-propagation described in my first article. We will have an input layer consisting of elements two and three above, and an output layer with element one above. We will also have some hidden processing elements. In this case, some of the hidden processing elements take on a very special form and rather than being connected to all of the input data, they are connected only to lagged sales values that appear on the input line. This special form makes these elements act like a memory in the network: the network is able to remember past values of sales and past predictions. That is the recurrent part of a recurrent neural network, and these special processing units are usually referred to as a context layer.

Alternatively, one can load past values of the series onto

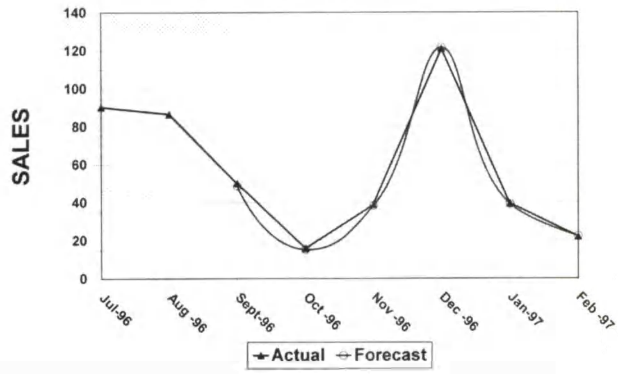
FIGURE 9: EXOGENOUS VARIABLES



a single line of the input file, as we have done in our example, and use a technique known as time-delayed neural networks (TDNN). In either case, back-propagation works like it did before: the network adjusts weights from the input units to the hidden units, and from the hidden units to the output units, until its estimate of the output best matches the actual outputs. Notice, however, that the outputs in this case are the level of sales four months in the future. By this specific arrangement, the network is being trained to minimize the error between its four-month ahead forecast and the actual four-month ahead data. The weights that lead to the best match between inputs and outputs show the impact of the exogenous variables and previous values of sales on sales four months in the future.

Networks for each of the outputs that resulted from splitting the signal are trained separately. When each is done training, adding their forecasts together gives a four-month ahead forecast. Since exogenous variables have been included, it is a simple matter to show how strongly they impact current and future sales, as shown in Figure 9. Figure 9 shows the relative impact of a variety of econometric measures on our sales forecast. The large positive weight on personal consumption expenditures means that if this measure increases in January, sales will increase in May. Similarly, if interest rates go up in January, sales will go down in May because of the large negative impact of prime rate. These impact scores are easily obtained from the neural network since they are nothing more than the weights with which the variables connect to the output layer. The ability to factor in exogenous variables in such an easy and powerful way is one of the most important features of neural net based forecasting.

FIGURE 10: 6 MONTH AHEAD FORECAST

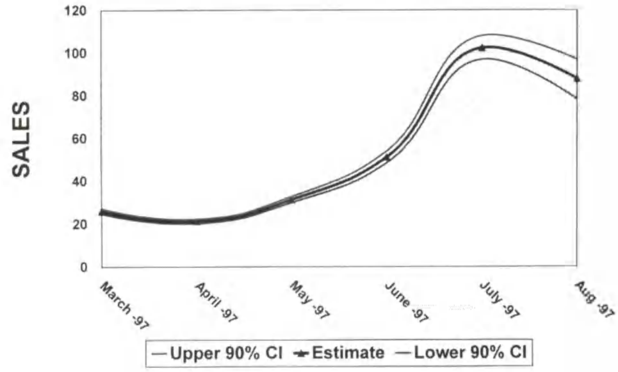


I will leave it to the reader to figure out, but the fundamentals of the approach I've just outlined can be used for survey-based pricing studies, in which case the weights show completely non-linear price elasticity and cross-elasticity demand coefficients. By including other econometric variables, you could see how the larger economic environment impacts price sensitivity. If some of the exogenous variables concern advertising, the weights show advertising elasticities of demand. Neural networks have been extensively used to model all the elements of the marketing mix. Similarly, a discrete choice experiment can be set up where the hidden unit's weights are equivalent to those obtained from multinomial logit. In this case, the input lines consist of choice probabilities and dummy-coded design information.

8. Error correction filter

Figure 10 shows a six-month forecast and actual sales volume for our series. The forecast was made in August 1996 before values for September 1996 through February 1997 were available. Each month's forecast is within \$100,000 of actual, even in December when sales surged to \$120 million, their highest level ever. Figure 11 shows the output from what is known as an error correction filter. The name is really bad, since the filter doesn't cor-

FIGURE 11: 6 MONTH FORECAST AND CONFIDENCE INTERVALS



rect any errors. All it does is calculate how likely the forecast is to be wrong. The output of the error correction filter can be turned into confidence intervals, as shown in Figure 11. The combination of all the neural nets yoked together are 90 percent confident that the true sales value for August 1997 will lie between \$79 and \$96 million. As intuition would demand, the area within the confidence intervals increases — we are more confident about our predictions for the immediate future than we are about predictions concerning the distant future.

Valuable to researchers

In summary, the neural network approach to time series forecasting has several properties that should make it valuable to market researchers:

1. Compared to ARIMA and other econometric forecasting methods, it is very, very easy to implement. Software for Fourier transformations are available in all of the major statistical packages such as SPSS or SAS.

2. The neural network approach makes integrating the effect of exogenous variables a snap. This step is very cumbersome in ARIMA models.

3. In ARIMA and regression models, you initially guess at the order of the AR and MA terms. The neural network approach essentially solves for the correct order of these terms through training.

4. A neural network model can learn from its past mistakes. When new data becomes available, ARIMA models must be developed from scratch.

On the downside,

1. I quickly glossed over developing confidence intervals for a forecast. The precise details of how the error correction filter is built and used require a strong working knowledge of calculus.

2. In the example, the neural network was trained to forecast four time periods into the future. Usually, one forecasts only one period into the future and then uses this forecasted value to build a forecast for the second period and so on. This is called bootstrapping and can be moderately cumbersome to implement. ❑

American Century

continued from p. 11

About one-third (32 percent) of respondents indicated that they would check their balances more frequently if they could get balance information on-line. The remaining individuals said they would check their balances at about the same frequency or even less frequently with an Internet option.

Mutual fund Web site proliferation may be slightly ahead of shareholder demand for on-line services. But as investors become more familiar with the technology, usage should increase. Those who have been on the Internet for at least two years are almost twice as likely to have visited a mutual fund Web site, compared to those with less than six months of experience on-line. "The effect that tenure has on Web site mutual find usage is interesting," Murray says. "There really does seem to be a learning curve."

Experience on the Internet	%Visiting Fund Co. Web Site
Less than 6 months	23 %
6 months to under one year	20 %
One year to under two years	30 %
Two years or more	42 %

Likelihood to use fund company on-line service features in the next 12 months is related to past experience with fund company Web sites. Those who have visited mutual fund companies on the Internet are more likely to use their services in the future. For example, while 43 percent of fund investors with Internet access said they were likely to check fund prices in the next year, 63 percent of investors who have visited a fund Web site said likewise.

Those who primarily invest directly with mutual fund companies (instead of using a broker) are the most likely to have visited a mutual fund Web site (47 percent). In addition, of those who invest with more than three fund companies, 45 percent have visited a mutual fund Web site, compared with only 32 percent of those who invest with two or three firms and 18 percent of those who invest with a single firm.

Transaction activity limited

Even among experienced Internet users, including those who make other types of purchases on-line, anticipated mutual fund transaction activity over the Internet is very limited. "As the mutual fund industry moves toward allowing account access on the Internet, we were interested in finding out about the concerns people would have in using the Internet to make transactions so that we could address them," Murray says.

Concerns With Transacting on the Internet (%Reporting "Extremely Concerned")	
Security	63 %
Site might be down	15 %
Timeliness	13 %

Only 10 to 11 percent indicated being likely to buy shares, move shares or sell shares on-line. However, the likelihood of using transaction services on the Internet is double for those who have already made some type of purchase on-line. "We're really early in the process of on-line transactions. People are still skeptical about making them. There seems to be much more comfort with gathering information than there is with actually sending money over the wire, so to speak. We feel that skepticism will diminish, but there is a plateau beyond which it will be hard for more than that amount of people to be comfortable doing it," Murray says.

"We're really early in the process of on-line transactions. People are still skeptical about making them. There seems to be much more comfort with gathering information than there is with actually sending money over the wire, so to speak."

When asked "What concerns, if any, would you have making transactions with your mutual funds on the Internet?" privacy, security and theft fears were mentioned on an unaided basis by 68 percent of respondents. No other concerns were reported by more than 6 percent of study participants. When asked to rate potential problems with on-line mutual fund access, nearly two-thirds of respondents (63 percent) said they would be extremely concerned that someone would be able to access their account information. This is four times as many as other potential concerns.

Overcome hurdles

Murray says American Century is considering conducting the study on a regular basis, perhaps every two years. "The study brought to light the hurdles we're going to have to overcome as we continue to develop our Web site. And it also tempered some of the expectations that we had."

"A study of this magnitude will allow us to understand the changes in behavior over time," Seratti says. "Although the number of shareholders using the Internet is still relatively small, we expect a significant increase in the percentage of shareholders who will transact on-line by the year 2000." ❑

Yahoo!

continued from p. 13

with their E-mail name, we were able to offer the possibility of restarting the uncompleted survey at a later time, and picking up neatly where they left off. The result of this is that despite the stage two questionnaire being substantially longer the drop off rate fell to around 5 to 6 percent. This was somewhat assisted by the exhortation to complete contained in a personalized E-mail and the opportunity to win one of five hand-held electronic organizers.

In line with other studies of Web usage, 80 percent of the respondents were male but, surprisingly, around 60 percent were employed and over 35 percent were between 25 to 35 years old. The study also exploded a general myth that the primary Web users remain businesses; although around half use it for both business and personal, of those who stated exclusively one or the other, twice as many Web users in the survey used it solely for leisure and personal reasons.

Stage two — The in-depth study

While stage one of the exercise invited anyone who clicked on the advertising banner to complete the initial survey, stage two was conducted among those who left a valid E-mail name in stage one and agreed to participate further. These respondents were sent an E-mail informing them of the survey location on the Web. The survey was much longer than the first stage, consisting of a series of in-depth lifestyle questions. Because these respondents are known to us, we could ask them to sign in and in doing so, we could very accurately measure the response rate. We could send out reminders, if necessary and ensure that individual respondents only completed the survey once. In fact we achieved our target sample size within one week of sending the E-mail notices, and no reminders were necessary. The graph in Figure 1 shows the reaction to the E-mails sent for the U.K. only. It is a measure of hits — i.e., the number of people indicating a willingness to start the survey. It is not a measure of "completes"[1]. The dates along the foot of the graph refer to midnight on each specified day. On Thursday, May 22, 3,163 E-mail messages were sent out during the day. Ten days later, we had received a total of 2,263

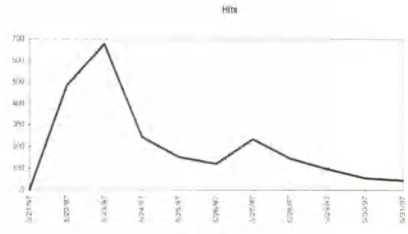


figure 1

hits, which represents a potential 72 percent response rate. Also note that Monday, May 26 was a public holiday in the U.K.

Continental Research will be analyzing the data in depth and reporting on the results later in June 1997.

For a third step, Yahoo! will put together large cross-media surveys to provide potential advertisers information about the quality of audience who access certain Web sites. Using audience qualification tools like MRI indices, similar surveys are run by Jupiter Communications in the U.S., but so far there have been no Internet-wide audience surveys conducted.

Sensible and viable

Results of the Yahoo! survey indicate the Web is a sensible and viable vehicle for surveys of Internet users. As shown by the results so far, we can achieve excellent response rates for a fraction of the cost of traditional methods. But what about researching issues that are not technology related? Is using panels to conduct consumer research the only viable method? The answer, in my view, is a resounding yes, but I believe continued research into the different survey techniques is required before we can proclaim the Web a substitute for other data collection methods. However, we intend to continue to experiment, to learn and to adapt the very real opportunities offered by the Web, where appropriate, for our customers throughout the world. ❑

[1]A large proportion of the difference between hits and completes in this case may be due to server congestion over the weekend. More in depth analysis is still required to understand this.

Internet quantitative

continued from p. 19

to this broad statement. For example, computer products purchasers and users of Internet services are both ideal populations. Both populations are likely to have very high connectivity and neither are likely to have high levels of cyberphobia. Consumers who have purchased products or services using the Internet are not likely to be fearful of Internet surveys. Web-delivered questionnaires can be made part of the purchase transaction (for customer satisfaction studies, for example), with attendant high levels of motivation and participation from the respondents.

Business and professional users of Internet services are also an excellent population to reach with Internet surveys. Over 80 percent of businesses are currently estimated to have Internet connections, with the number expected to reach 90 percent by next year. Business users are likely to have experience with the Internet and to recognize its convenience in replying to questionnaires. In business-to-business research, product and service demonstrations are often crucial. Web-delivered questionnaires, with their ability to weave text and audio-visual demonstrations into the questionnaire, are an excellent way to reach a business population.

Internet questionnaires can frequently be used to supplement traditional methods of collecting questionnaire data. The portion of the target population that uses the Internet can be reached cheaply and quickly with Internet questionnaires, while those not connected can be reached by mail or telephone. Supplementing traditional survey methods provides some immediate cost savings, as well as a migration path toward fuller Internet interviewing in the future as the connectivity of the general population increases.

Internet samples

Internet samples fall into three categories: unrestricted, screened and recruited.

In an unrestricted sample, anyone on the Internet who desires may complete the questionnaire. These samples may have poor representativeness due to self-selection of the respondents. The rate of participation (completion rate in traditional survey terms) is generally low. Unrestricted samples do have utility in applications like point-of-sale surveys for Web commerce, Web site user profiles, bingo card-like customer interest surveys, or recruitment of potential focus group members.

Screened samples adjust for the unrepresentativeness of the self-selected respondents by imposing quotas based on some desired sample characteristics. These are often demographic characteristics such as gender, income and geographic region, or product-related criteria such as past purchase behavior, job responsibilities or current product use. The applications for screened samples are generally similar to those for unrestricted samples.

Screened sample questionnaires typically use a branching or skip pattern for asking screening questions to determine whether or not the full questionnaire should be presented to a respondent. Some Web survey systems can make immediate market segment calculations that assign a respondent to a particular segment based on screening questions, then select the appropriate questionnaire to match the respondent's segment.

Alternatively, some Internet research providers maintain a "panel house" that recruits respondents who fill out a preliminary classification questionnaire. This information is used to classify respondents into demographic segments. Clients specify the desired segments, and the respondents who match the desired demographics are permitted to fill out the questionnaires of all clients who specify that segment. This approach is somewhat less flexible than using tailored screening questions that are unique to the survey being conducted, and also raises questions about the representativeness of respondents who are willing to spend the time to fill out many different questionnaires for different clients.

Recruited samples are used for targeted populations in surveys that require more control over the make-up of the sample. Respondents are recruited by telephone, mail, E-mail, or in person. After qualification, they are sent the questionnaire by E-mail, or are directed to a Web site that contains a link to the questionnaire. At Web sites, passwords are normally used to restrict access to the questionnaire to the recruited sample members. Since the makeup of the sample is known, completions can be monitored, and follow-up messages can be sent to those who do not complete the questionnaire, in order to improve the participation rate.

Recruited samples are ideal in applications that already have a database from which to recruit the sample. For example, a good application would be a survey that used a customer database to recruit respondents for a purchaser satisfaction study. Another application might be the construction of a consumer panel for tracking research. The convenience of filling out a short Internet survey as compared to a paper diary that must be mailed back should increase the participation rate and the accuracy of the answers.

Different methods of conducting Internet surveys

E-mail questionnaires. The questionnaire is prepared like a simple E-mail message, and is sent to a list of known E-mail addresses. The respondent fills in the answers, and E-mails the form plus replies back to the research organization. A computer program is typically used to prepare the questionnaire, the E-mail address list, and to extract the data from the replies.

E-mail questionnaires are simple to construct and fast to distribute. By showing up in the respondent's E-mailbox, they demand immediate attention.

However, they are generally limited to plain text, although graphics can be sent as E-mail attachments that are decoded separately from the questionnaire text. Many standard questionnaire layout techniques, such as creating grids of questions and scale responses, cannot be done in a visually attractive way in E-mail. There is no check for validity of data until the whole questionnaire is returned, so there is virtually no opportunity to request that the respondent reenter bad data. The respondent may damage the questionnaire text in the process of responding, making automatic data extraction impossible and requiring hand coding of damaged responses. In addition, all question skips are carried out by the respondent, who is given a set of instructions embedded in the text ("If you replied 'yes' to this question, skip to Question 23"). This can result in illegal skip patterns, which may require more hand recoding, or result in missing data or rejected questionnaires.

Converted CATI systems. A software translator program takes questionnaires programmed in the CATI vendor's questionnaire construction language and translates them for distribution over the Web. The Web server may be located in the research supplier's facility, or time may be rented from a service bureau that has the CATI system installed. The Web server is linked to a database that receives the respondents' replies and stores them.

Converted CATI systems have the good sample and quota management typical of CATI programs. They also inherit the ability to set up complex skip patterns for screening and to adapt to respondents' replies. They can do data verification at the time of entry, and request reentry of illegal data immediately. Converted CATI systems provide quick migration to Internet interviewing for current users of a particular CATI system and permit reuse of existing programmed questionnaires. In some systems, progress of the Internet survey can be monitored while data is being collected, with some intermediate data extracts available for a fee (daily summaries, for example).

On the negative side, the CATI systems on which these Internet survey products are based were designed for a telephone interviewer working from a computer screen. Respondent screen formatting is somewhat limited as a result. In addition, the CATI languages frequently do not take advantage of the Web's ability to present graphics and audio-visual material. The researcher is locked into a single CATI system provider's technology, which is only a small disadvantage if the researcher is already using that CATI system, but a larger one if the researcher is not. Finally, the converted CATI systems are expensive to purchase and use.

Converted disk-by-mail systems. These are similar to converted CATI systems. Disk-by-mail systems provide a questionnaire construction tool that creates a program file on a floppy disk that the respondent subsequently runs on a personal computer. The program presents the questions on the computer screen and records the answers on the program floppy disk, which is then mailed back to the research organization. The converted disk-by-mail system adapts the questionnaire for presentation via the Web, and provides a data management program to record the answers provided by the respondents.

Converted disk-by-mail systems have the same skip pattern management and data verification advantages of converted CATI systems, with the addition of more flexible questionnaire construction tools that include graphical and audio/visual material. However, they inherit the limitations on quota management of the disk-by-mail approach, which is designed to present a single questionnaire to a single respondent. They typically require that the user manage his/her own Web site and install and maintain the software on that site.

Web CGI programs. In this approach to Internet survey research, each questionnaire is programmed directly in HTML (the presentation language used by the WWW) using a computer script language such as PERL or a programming language such as Visual Basic. The programmed questionnaire is placed on a Web server at the client's location or on a server located in a service bureau. The program uses the Common Gateway Interface (CGI) of the WWW to place respondents' replies into a database. Database queries can be programmed to give periodic reports of the data to date, including statistical analyses.

The CGI programming approach is the most flexible of all. Complex question skips and data verification and reentry can be achieved, and programming languages can use the full capability of the Web. Since all questionnaires are custom programmed, Web CGI programs are not tied to a proprietary CATI language, or a single technology vendor. Database operations and queries can be programmed to adapt to virtually any special reporting need of the researcher.

This flexibility comes with a cost, however. Since questionnaires and database operations are essentially custom computer programs that must be created and debugged by highly-trained programmers, they are expensive. The computer languages contain no special tools for tasks like screening, quota management and question skip pattern management, so programming these features in each questionnaire further increases the cost.

The CGI program must be placed on a Web server system to distribute the questionnaires and collect the data. This can be the research client's Web server, or a server provided by the research supplier. If the survey is placed on the client's Web server, time for programming and debugging can be difficult to schedule. Large corporate sites often require several administrative approvals before any modifications of the site can be made, and technical staff are frequently leery of allowing an outside programmer to place a program on their site.

Web survey systems. These are software systems specifically designed for Web questionnaire construction and delivery. In essence, they combine the survey administration tools of a CATI system with the flexibility of CGI programming. They consist of an integrated questionnaire designer, Web server, database, and data delivery program, designed for use by non-programmers.

In a typical use, the questionnaire is constructed with an easy-to-use questionnaire editor using a visual interface, then automatically transmitted to the Web server system. The Web server distributes questionnaire and files responses in a database. The user can query the server at any time via the Web for completion statistics, descriptive statistics on responses, and graphical displays of data. Data can be downloaded from the server at any time for analysis at the researcher's location. The questionnaire construction and data display programs reside on the user's computer system, while the Web server is located in a survey technology provider's office.

Web survey systems include tools that allow non-programmers to create complex questionnaires that are visually appealing. The complexity of skip patterns and data verification that can be achieved approaches that of the CGI programming approach. Users do not have to maintain a Web site or database, so there is less disruption of clients' Web sites and computing facilities. Sample quota control is as good as that provided by converted CATI systems. In addition, tools to personalize questionnaires with database information (like inserting the respondent's name in a questionnaire delivered to a restricted sample respondent) and to add graphics and sound without programming are often included.

Web survey systems typically have a lower cost per completed interview than converted CATI, converted disk-by-mail, or CGI programs, although they are more expensive than E-mail surveys for small surveys (under 500 respondents). The lower cost results from the efficiencies of using software tools designed specifically for Web use, and from the cost-sharing of Internet access costs and hardware costs that a central server system provides.

Like converted CATI, converted disk-by-mail, and CGI programming, Web survey systems use the more passive Web retrieval for questionnaires. E-mail, although it has many limitations, is more immediately attention-demanding. Also, for current users of CATI systems, migration of existing questionnaires to Web survey systems is more difficult than migration to a converted CATI system. Questionnaires must be manually cut and pasted into the Web survey questionnaire constructor.

Definite advantages

Internet survey research is not appropriate for all populations and all projects, but for many applications it provides definite advantages. For populations already using the Internet, or for "early adopter" populations, quantitative survey research on the Internet can give faster results at a lower cost than traditional methods. Internet questionnaires can be used to supplement traditional quantitative data collection methods as a way of reducing the overall cost of a project or as the beginning of a migration to all-Internet surveys in the future. ❑

The kind of Internet survey technology to use for a project depends on the circumstances of survey. This grid summarizes the strengths and weaknesses of each.

	E-Mail	Converted CATI	Converted Disk-By-Mail	Web CGI Programs	Web Survey Systems
Ease of creation/ modification	Excellent	Fair	Good	Poor	Excellent
Ease of Access to Preliminary Data	Poor	Fair	Good	Excellent *(with extra programming)*	Excellent
Sample Quota Control	Poor	Excellent	Fair	Excellent *(with extra programming)*	Excellent
Data Validity Checks	Poor	Good	Good	Excellent *(with extra programming)*	Excellent
Demand of Respondent's Attention	Excellent	Good	Good	Good	Good
Personalization of Questionnaires	Fair	Fair	Poor	Excellent *(with extra programming)*	Excellent
Conversion of Existing Questionnaires	Fair	Excellent	Good	Good	Good
Expertise Required by Questionnaire Creator	Low	High	Moderate	Very High	Moderate
Cost per Completion	Inexpensive	Expensive	Expensive	Very Expensive	Moderate to Inexpensive

Names of Note

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Aragon Consulting Group, St. Louis, has opened three new offices in the Chicago, Los Angeles and San Francisco metro areas. The Chicago office will be staffed by **John Adams**, vice president and senior consultant. **Diane Dailacis**, vice president and senior consultant, will head the Los Angeles office. **Larry Felix** will run the San Francisco office.

Elaine Riddell has been named vice president of business development for *NOP Healthcare Advanced Consulting Group*, Princeton, N.J.

Johan Lissens will serve as general manager of the new European office of *Strategic Marketing Corp.* (SMC) in Brussels. SMC is based in Bala Cynwyd, Pa.

Cindy Ford has joined *Decision Analyst, Inc.*, Arlington, Texas, as vice president and director of statistical science.

Larry Weltin has joined Atlanta-based *Compass Marketing Research*, the data collection division of Marketing Workshop, Norcross, Ga., as president.

Walker Information, Indianapolis, Ind., has named **Joyce Howe** vice president, relationship management for the energy utilities team. In addition, **Kathleen Pearson** has been named vice president, relationship management for the customer satisfaction measurement programs; **Lisa Pflueger** has been named vice president, customer relationship, product management; **Dr. Kim Saxton** has been named vice president, research sciences.

Dale Watts has joined the Atlanta office of *Elrick & Lavidge* as account director.

Karlan Witt has been promoted to vice president, market and brand research services, at *IntelliQuest Information Group, Inc.*, Austin, Texas. The firm also promoted **Michael Gale** to vice president, international research.

Juliet Goodfriend, president of *Strategic Marketing Corp.*, Bala Cynwyd, Pa., was named by Pennsylvania Governor Tom Ridge as one of the "50 Best Women in Business" in 1997, an award given by the Pennsylvania Department of Community and Economic Development.

Chris Hauck has joined *Chilton Research Services*, Radnor, Pa., as research consultant for its communications team.

Joanne (Joni) Albrecht Muir has been appointed to the management board of *Winona, Inc.*, Phoenix, Ariz.

Retail Planning Associates, Inc., Columbus, Ohio, has named **Bradley Ballantine** president.

Asad Farooq has joined *TeleSession Corp.*, as training manager in the firm's New York headquarters. In addition, **Rosa Vinales** has joined the firm as executive administrative assistant, and **Debra Feresten** has been named program coordinator.

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over the past 13 years.

The unlisted rate is determined by comparing the estimated number of telephone households with the actual number of households found in telephone directories. Estimated telephone households are computed by taking projected country level household estimates and applying a figure from the U.S. Census that indicates the percent of households with a telephone.

Unlisted telephone households can be broken down into two groups: those that are unlisted because of mobility and those that are unlisted by choice. Approximately 20 percent of households move each year. Demographically, these households tend to be younger, more urban, and less likely to own single-family dwelling units. Households that are unlisted by choice tend to have higher than average income. Households that are unlisted by circumstance tend to be lower income.

For a complete list of the top 100 markets and their 1997 unlisted rates, send an E-mail request to info@ssisamples.com.

Top 25 Unlisted Markets

(of the top 100 metro areas)

1. Sacramento, Calif.
2. Oakland, Calif.
3. Fresno, Calif.
4. Los Angeles-Long Beach, Calif.
5. San Diego
6. San Jose
7. Orange County, Calif.
8. Riverside-San Bernardino, Calif.
9. Bakersfield, Calif.
10. San Francisco
11. Ventura, Calif.
12. Las Vegas
13. Portland, Ore.-Vancouver, Wash.
14. Tacoma, Wash.
15. Honolulu
16. Jersey City, N.J.
17. Tucson
18. El Paso
19. Seattle-Bellevue-Everett, Wash.
20. San Antonio
21. Detroit
22. Phoenix-Mesa, Ariz.
23. Chicago
24. Miami
25. Houston

Insight Orlando, Inc., Orlando, Fla., is doubling its space in the Airport Business Center to a total of more than 5,000 square feet at 5828 South Semoran Blvd., Orlando. The expansion includes a 20-station telephone center and a third focus group suite. The business office, formerly in Maitland, Fla., will now operate from the Semoran Blvd. address. For more information call 407-384-8883.

Lennox Research, Inc. (LRI), has moved to 2107 Park Ave. N., Winter Park, Fla. Mystery Guest, Inc., the mystery shopper division of LRI, will also operate from the Park Ave. address. For more information call 407-647-3333.

Since leaving his position as director of market research and planning at Converse, Inc., Mel Roboff has opened **Roboff Management Group**, a market research consulting firm, at P.O. Box 804, Needham Heights, Mass., 02194. Phone 617-455-6580.

Cambridge Focus, a new qualitative research facility, has opened at 600 Memorial Dr., Cambridge Mass., 02139. The facility features three discussion suites (traditional, modular, living room style) and tiered observation rooms. For more information call Lloyd Simon at 508-263-6617.

A new firm specializing in research for the motion picture industry, **ETS Research**, has opened at 2313 N. Valley, Burbank, Calif., 91505. Phone 800-206-2823. Fax 818-556-2666. E-mail: etsmovie@primenet.com. For more information call Doreen Hitchcock.

Attitude Measurement Corp., Southampton, Pa., is moving to larger corporate headquarters. The firm has also recently opened regional offices in the south and midwest. The new offices are located at County Line Business Campus, 75 James Way, Second Floor, Southampton, Pa., 18966. E-mail: amc@amcglobal.com. Phone 215-364-1440. Fax 215-364-3912.

Mitsubishi Caterpillar Forklift America (MCFA), the joint venture company responsible for manufacturing and sales of two major forklift brands, has selected **Quest Research**, Houston, for its second round of benchmark survey needs.

Portland, Ore.-based **Sorensen Associates Inc.** has opened an office in the Minneapolis area at 1711 County Road B West, Ste. 320, Roseville, Minn. Phone 888-616-0123. James Sorensen will head the new office. Dan Peterson joins the new office as senior vice president for client services.

BAI (Behavioral Analysis Inc.), a Tarrytown, N.Y., research firm, has changed its name to BAIGlobal.

Equifax and VNU Marketing Information Services have announced a long-term strategic marketing and cross-licensing agreement linking the two firms for the next decade. In addition, VNU will acquire Equifax National Decision Systems and incorporate it into a newly formed VNU Precision Marketing Group.

Treistman & Stark Marketing, Inc. (TSMI), Hackensack, N.J., and Leichter Research, Dumont, N.J., have merged. The company will continue as TSMI.

NOP Information Group has formed NOP Healthcare Advanced Consulting Group, a strategic marketing consulting firm serving the pharmaceutical and health care industry. The new business, based in Princeton, N.J., will be a division of Market Measures, Inc., an NOP Information Group subsidiary based in Livingston, N.J.

Strategic Marketing Corp., Bala Cynwyd, Pa., has opened SMC Europe, Inc., in Brussels.

The Marketing Workshop, Inc., Norcross, Ga., is celebrating its silver anniversary as a provider of national marketing research and consulting services.

Market Segment Research & Consulting, Miami, recently sponsored an ethnic marketing think tank in Miami. Over 50 senior-level ethnic marketers met to discuss the growing U.S. ethnic consumer market. Facilitators led brainstorming sessions regarding ethnic marketing trends, interests, best practices and the impact of these challenges on future business.

Millward Brown International has signed a worldwide licensing agreement with ISPC Ltd., London, England, to use ISPC's electronic fiche software, a product that packages tabulations, summary reports, charts and presentations, to electronically deliver survey reports to its clients.

Colburn & Associates, Raleigh-Durham, N.C., has expanded its telephone interviewing capabilities, enabling it to provide a broader range of quantitative research services.

Elliott Benson, a new data collection company, has opened at 1234 H St., Ste. 200, Sacramento, Calif. The firm will offer complete qualitative and quantitative data collection services. Brochures and first-visit discounts available upon request. Phone 916-325-1670.

Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 612-854-5101/ fax 612-854-8191.

Alexander + Parker
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http://www.hamcr.com
Contact: Dr. Sandra M.J. Wong
Qual./Quant.Rsch.-Cantonese, Mandarin, Japanese, Korean, Vietnamese, Tagalog, etc. U.S. & Intl.

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Auto Marketing & Product Experts. 1100 Groups Moderate & Recruit.

BAI (Behavioral Analysis Inc.)
580 White Plains Rd.
Tarrytown, NY 10591
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Innovative & Standard Approaches To Qual. Research.

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Fax 810-223-0036
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Contact: Milton Brand
New Products - Qualitative Research & Consulting.

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Fax 404-261-7607
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http://www.brittainassociates.com
Contact: Bruce Brittain
Custom Research Consultants. "Next-Step" Solutions.

Burr Research/Reinvention Prevention
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Ph. 360-671-7813
Fax 360-671-7813
E-mail: BURRRESEAR@aol.com
Contact: Robert L. Burr
Answers Via Actionable Survey & Qualitative Research; 1-on-1s.

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Full Service Mkt. Rsch. Firm - Consumer & Bus.-to-Bus.

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http://www.activemac.com/focus
Contact: Carole Robbins
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http://members.aol.com/marketrsh/index.html
Contact: Paul L. Colburn
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Ph. 206-241-6050
Fax 206-241-5213
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Contact: Jerry Carter
Consumer, Business Groups and One-On-Ones.

Cunningham Research Associates
2828 W. Parker Rd., Ste. B202
Plano, TX 75075
Ph. 972-596-4072
Fax 972-964-3404
E-mail: crasrch@airmail.net
Contact: Mark W. Cunningham
Qual. & Quant. Rsch.: Consumer, Advg., Bus./Bus., Hi-Tech.

Daniel Associates
49 Hill Rd., Ste. 4
Belmont, MA 02178
Ph. 617-484-6225
Contact: Stephen Daniel
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Contact: Jerry W. Thomas
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Fax 612-829-4645
Contact: Carol Graff
Custom Marketing Research & New Business Development Consulting.

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Contact: Dr. Marcia Nichols Trook
Nat'l./Int'l. Clients. Specialty: New Products, Direct Marketing, Publishing.

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Contact: Bill Hammer
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Fax 216-621-8455
Contact: Mark Kikel
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Spiller & Reeves Research
Susan M. Williams Rsch. & Disc. USA

POLITICAL/SOCIAL RESEARCH
Cambridge Associates, Ltd.
Francesca Moscatelli

POSITIONING RESEARCH
Paul Schneller - Qualitative

PUBLIC POLICY RSCH.
David Binder Research
Cambridge Associates, Ltd.

PUBLISHING
Cambridge Associates, Ltd.
First Market Research Corp. (Heiman)
Greenleaf Associates, Inc.
Marketing Advantage Rsch. Cnslts., Inc.
Spier Research Group

RETAIL
Pat Henry Market Research, Inc.
Knowledge Systems and Research, Inc.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
MCC Qualitative Consulting

SENIORS
Fader & Associates
Sunbelt Research Associates, Inc.

SERVICES
Spier Research Group

SMALL BUSINESS/ ENTREPRENEURS
Brittain Associates
Linda Fitzpatrick Rsch. Svcs. Corp.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Strategy Research Corporation
Yarnell, Inc.

SOFT DRINKS, BEER, WINE
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Grieco Research Group, Inc.
Strategy Research Corporation

SPORTS
Performance Research
Research Options, Inc.

TEACHERS
Greenleaf Associates, Inc.

TEENAGERS
C&R Research Services, Inc.
Doyle Research Associates
Fader & Associates
KidFacts℠ Research
Matrixx Marketing-Research Div.
MCC Qualitative Consulting
Performance Research
Thorne Creative Communications

TELECOMMUNICATIONS
BAI (Behavioral Analysis Inc.)
Daniel Associates
Elrick and Lavidge
Erlich Transcultural Consultants
First Market Research Corp. (Heiman)
Knowledge Systems and Research, Inc.
Linda Fitzpatrick Rsch. Svcs. Corp.
Horowitz Associates Inc.
Marketing Advantage Rsch. Cnslts., Inc.
MCC Qualitative Consulting
Qualitative Applied Research
Strategy Research Corporation

TELECONFERENCING
Cambridge Research, Inc.
Decker Research Associates, Inc.

TELEPHONE FOCUS GROUPS
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Doyle Research Associates
Market Navigation, Inc.
Medical Marketing Research, Inc.
MedProbe, Inc.

TOURISM/HOSPITALITY
Research Data Services, Inc.

TOYS/GAMES
Fader & Associates
Greenleaf Associates, Inc.
KidFacts℠ Research

TRANSPORTATION SERVICES
Nancy Low & Associates, Inc.
Markinetics, Inc.
SIL: Worldwide Marketing Services
Strategic Focus, Inc.

TRAVEL
Cambridge Associates, Ltd.
Greenleaf Associates, Inc.
Performance Research
Research Data Services, Inc.
SIL: Worldwide Marketing Services
James Spanier Associates

UTILITIES
Cambridge Associates, Ltd.
Fader & Associates
Knowledge Systems and Research, Inc.

WEALTHY
Brittain Associates
The Deutsch Consultancy
Strategy Research Corporation

YOUTH
Fader & Associates
Macro International
Outsmart Marketing

Compass Marketing Research

Discover the *TRUE* Course in Data Collection

The *true* course is the course that is most accurate, reliable and quick. Compass points the way to service, professionalism and integrity in the world of data collection. We have the technology, the equipment, the facilities, the staff and supervisory personnel to meet your most demanding and unusual specifications. Our experienced project managers identify problems, recommend solutions, communicate effectively.

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- Consumers, professionals, executives, technicians, business owners

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State-of- the-Art Focus Group Suites

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- Connecting, private, client lounges with video monitor
- Portable, company owned video teleconferencing
- Latest technology for quality audio and video recording
- Separate restroom facilities for clients and respondents
- Separate client, respondent and staff entrances

Magellan Focus Group Room

Facilities Designed to Meet Unique Research Needs

- *Test Kitchen*: (25 x 24) large refrigeration units, conventional oven, microwave, freezer, warehouse product storage
- *Display Room*: (25 x 29) wide double doors, drive up ramp to easily accommodate automobiles, recreation vehicles, boats, etc.
- *Multipurpose Room*: 500 square foot room right off test kitchen ideal for taste tests, theatre seating
- *One-On-One Rooms*: one-way mirror viewing, audio and video recording
- *CRT Telephone Interviewing*: 110 Stations

Display Room

Follow your *TRUE* course to the best Atlanta has to offer

Call Compass Marketing Research Today!

1-800-627-7667 (In Atlanta) 770-448-0754 (fax) 770-416-7586

1997

Directory of Omnibus Research Studies

This directory was compiled by sending listing forms to companies we identified as providers of omnibus studies. The studies listed in this directory meet the following definition: An omnibus study is one in which the sponsoring research company defines the audience to be surveyed and the intervals between studies. Clients participate by submitting proprietary questions. Clients receive results only from their proprietary questions and general demographic questions.

Audits & Surveys, Inc.
650 Avenue of the Americas
New York, NY 10011
Ph. 212-627-9700
Fax 212-627-2034
E-mail: Feinberg@surveys.com
http://www.surveys.com
Barry M. Feinberg, Ph.D., Sr. Vice President
Studies:
IssueTrack®/USA
Tech/Track®

Behavior Research Center
1101 N. First St.
P.O. Box 13178
Phoenix, AZ 85002-3178
Ph. 602-258-4554
Fax 602-252-2729
E-mail: brc@primenet.com
http://www.primenet.com/~brc/
Earl de Berge, Research Director
Studies:
BusinessTRACK
ConsumerTRACK
HispanicTRACK
Southern AZ - Sonora Business Study
MetroTRACK

Beta Research Corp.
6400 Jericho Tpke.
Syosset, NY 11791
Ph. 516-935-3800
Fax 516-935-4092
Richard Welch, President
Studies:
Beta Omnibus Exchange - Consumers
Beta Omnibus Exchange - Business Executives
Beta Omnibus Exchange - Healthcare/Physicians

Irwin Broh & Associates
1011 E. Touhy Ave.
Des Plaines, IL 60018
Ph. 847-297-7515
Fax 847-297-7847
Dave Waitz, Exec. Vice President
Studies:
Marcom

BRUSKIN GOLDRING
RESEARCH

Bruskin/Goldring Research
100 Metroplex Dr.
Edison, NJ 08817
Ph. 732-572-7300
Fax 732-572-7980 or 7981
Irwin Korman, President
Studies:
OmniTel
Integrated Survey Information System-ISIS

OmniTel - Weekly national consumer study. For times when you need answers to a few marketing questions. It furnishes the same data quality as well-run dedicated surveys.

Integrated Survey Information System-ISIS - Weekly national consumer study. For custom surveys up to 15 minutes in length. It also furnishes the same data quality as well-run dedicated surveys. *(See advertisement on p. 3)*

California Retail Survey
5303 Nyoda Way
Carmichael, CA 95608
Ph. 916-486-9403
James Vaughn, President
Studies:
California Retail Survey, 1997 Edition

Canadian Facts
A Div. of CF Group Inc.
1075 Bay St.
Toronto, ON M5S 2X5
Canada
Ph. 416-924-5751
Fax 416-923-7085
E-mail: cf@cfgroup.ca
Michael LoPresti, President
Studies:
Monitor
Multifacts
Multi-Q

CENTRIS
The Cable Building
611 Broadway, Ste. 418
New York, NY 10012
Ph. 212-529-1010
Fax 212-529-3250
Jerilyn Kessel, Research Consultant
Studies:
CENTRIS Telephone Omnibus

CHILTON RESEARCH SERVICES

Chilton Research Services
201 King of Prussia Rd., 3rd fl.
Radnor, PA 19089-0193
Ph. 610-964-4600 or 800-EXP-POLL
Fax 610-964-2904
E-mail: rcooper@chilton.net
http://www.research.chilton.net
Roy Cooper, Express Business Manager
Studies:
Chilton's EXPRESS Omnibus

Chilton's EXPRESS Omnibus - Is a national weekly omnibus survey offering the highest quality research at the lowest price available. Designed to get the answers you need fast, EXPRESS allows you to submit questions as late as noon, Wednesday and to get full tabulations three business days later, on Monday. 1,000 adults interviewed. Nationwide RDD sample. Random respondent selection. Standard demographic banner.
(See advertisement on p. 84)

Custom Research Inc.
10301 Wayzata Blvd.
P.O. Box 26695
Minneapolis, MN 55426
Ph. 612-542-0800
Fax 612-542-0864
E-mail: custom@cresearch.com
http://www.cresearch.com
Lisa Gudding, Product Manager
Studies:
Criterion® Omnibus Concept Testing Sys.

Dittman Research Corp. of Alaska
DRC Building
8115 Jewel Lake
Anchorage, AK 99502
Ph. 907-243-3345
Fax 907-243-7172
E-mail: dittman@micronet.net
Terry O'Leary, President
Studies:
Multi-Quest®

Greenfield Online
274 Riverside Ave.
Westport, CT 06880-4807
Ph. 203-221-0411
Fax 203-221-0386
E-mail: scook@greenfieldgroup.com
http://www.greenfieldgroup.com
Steve Cook, Sr. Vice President
Studies:
Bi-monthly Online Omnibus

I.S.I.S.-Integrated Strategic Information Services
2516 Hastings Dr., Ste. 500
Belmont, CA 94002
Ph. 415-802-8555 or 415-802-8552
Fax 415-802-9555
E-mail: isis@isisglobal.com
Marc Limacher, Managing Director
Studies:
World Report 2000 - OECD Countrues
World Report 2000 - Emerging Economies
Telecom 2000 Report - U.S., Italy, France, Germany, U.K., Japan
Wireless 2000 Report - U.S., Italy, France, Germany, U.K., Japan

ICR

ICR/International Communications Research
605 W. State St.
Media, PA 19063
Ph. 610-565-9280
Fax 610-565-2369
E-mail: icr@icrsurvey.com
http://www.icrsurvey.com
Steven C. McFadden, President
Studies:
EXCEL
TeenEXCEL

EXCEL - National telephone omnibus survey of 1,000 consumers conducted twice each week. Interviewing through final tabulations in seven days. RDD sampling; CATI interviewing; totally conducted in-house; custom options; extremely cost effective.
TeenEXCEL - National telephone omnibus survey of 500 teens aged 12 to 17. Conducted monthly. Interviewing through final tabulations within seven days. Same procedures and quality controls as EXCEL. Combine TeenEXCEL and EXCEL for 12 years+ population.
(See advertisements on pp. 85, 87, 89)

IMR Research
140 Burlington
Clarendon Hills, IL 60514
Ph. 630-654-1077
Fax 630-654-1047
George Griffin, President
Studies:
Continuing Consumer Survey
Power Tools/Accessories/Home Improvement Survey
Canadian Continuing Consumer Survey
Continuing Consumer Automotive Maintenance Survey

Innovative Marketing, Inc.
40 Eglinton Ave. E., Ste. 203
Toronto, ON M4P 3A2
Canada
Ph. 416-440-0310 ext. 31
Fax 416-440-1768
E-mail: imi@istar.ca
Don Mayo, Vice President
Studies:
Public Reach - Canada
Urban Reach - Canada
Promo Trak - Canada
Loyalty Trak - North America

Interviewing Service of America, Inc.
16005 Sherman Way, Ste. 209
Van Nuys, CA 91406
Ph. 818-989-1044
Fax 818-782-1309
http://www.interviewingservice.com
Michael Halberstam, President
Studies:
Solutions

Leemis Marketing
1420 Kensington Rd., Ste. 106
Oak Brook, IL 60523
Ph. 630-571-1200
Fax 630-571-1427
E-mail: promodata@leemis.com
Studies:
Price-Trak
Coupon-Trak
Ad Activity
Retailer Ad Digest
Target-Trak
Custom-Trak

Macro International, Inc.
100 Avenue of the Americas
New York, NY 10013
Ph. 888-MACRO-US
Fax 212-941-7031
E-mail: Rhindress@macroint.com
http://www.macroint.com
Sheila Paterson, Pres. Int'l. Mkt. Rsch./Cnsltg
Studies:
Eastern EurOpinion Omnibus
Eastern EurOpinion Woman Watch
Eastern EurOpinion Teen Track
Eastern EurOpinion Men's Monitor

Market Facts of Canada
77 Bloor St. W.
Toronto, ON M5S 3A4
Canada
Ph. 416-964-6262
Fax 416-964-5882
Peter Greensmith, Sr. Vice President
Studies:
National Flexibus
TeleNation - Canada
National ShowCase

MARKET FACTS

Market Facts, Inc.
3040 W. Salt Creek Ln.
Arlington Heights, IL 60005
Ph. 847-590-7000
Fax 847-590-7010
Tom Payne, President
Studies:
TeleNation
Data Gage
Mini Screen
National ShowCase

Market Facts is unique in providing omnibus research through four distinct data collection options: **TeleNation** (twice-weekly telephone survey), **National ShowCase** (weekly mall interviews) **Data Gage** and **MiniScreen** (monthly consumer mail panel studies). Each of these four products combines a solid research methodology with speed and affordability.
(See advertisement on p. 86)

Market Measures, Inc.
354 Eisenhower Pkwy.
Livingston, NJ 07039
Ph. 201-533-1800
Fax 201-716-0693
E-mail: sohara@mmi-research.com
Steve O'Hare, Group Director
Kathy Imhof Assoc. Project Director
Studies:
OmniMed®

Market Opinion Research
31700 Middlebelt Rd., Ste. 200
Farmington Hills, MI 48334
Ph. 248-737-5300 or 800-878-7223
Fax 248-737-5326
E-mail: information@morpace.com
Jeffrey Leiman, Project Director
Studies:
Market Opinion Reports

Market Trends, Inc.
3633 136th Pl., S.E., Ste. 110
Bellevue, WA 98006
Ph. 425-562-4900
Fax 425-562-4843
E-mail: Jackie@markettrends.com
http://www.markettrends.com
Jackie Weise, Exec. Vice President
Studies:
Opinion Monitor

Marketing Resource Group, Inc.
225 S. Washington Square
Lansing, MI 48933
Ph. 517-372-4400
Fax 517-372-4045
E-mail: MRG@voyager.net
Paul King, Dir. of Survey Rsch.
Studies:
MRG Fall Michigan Poll
MRG Spring Michigan Poll

MarketResponse International USA, Inc.
6442 City West Pkwy., #305
Minneapolis, MN 55344
Ph. 612-943-2230
Fax 612-943-2320
Thomas Andersen, Client Consultant
Studies:
Telescope - Belgium
Telescope - Holland

Mature Marketing and Research
85 E. India Row, Ste. 30A
Boston, MA 02110
Ph. 617-720-4158
Fax 617-723-1254
Dr. Leslie M. Harris, Managing Partner
Studies:
Fifty Plus
Sixty Plus

Personal interviews with consumers age 50 plus. Frequency: weekly, monthly, quarterly. Local, regional or national markets. Low cost, fast turnaround. Financial (banking, investment), travel and leisure, retirement communities, telecommunications, consumer products. High quality results, tabulation, analysis optional.
(See advertisement on p. 87)

Medical Data Management Corp.
25 E. Loop Rd.
Stony Brook, NY 11790
Ph. 516-246-8100
Fax 516-246-8121
E-mail: 74511.2340@compuserve.com
http://www.mdmco.com
Elizabeth Montgomery, Dir. Business Development
Studies:
OTC-Bus
PromoTest
AsthmaTrak - Europe
OncTrak (Oncology) - Europe
OsteoTrak (Osteoporosis) - Europe

NFO Research, Inc.
2 Pickwick Plaza, Ste. 400
Greenwich, CT 06830
Ph. 203-629-8880
Studies:
Multicard

NIPO, The Market Research Institute
P.O. Box 247
Grote Bickersstraat 74
Amsterdam 1000 AE
The Netherlands
Ph. 31-20-522-5444
Fax 31-20-522-5333
E-mail: info@nipo.nl
http://www.nipo.nl
Dr. Theo A. Hess, Managing Director
Studies:
Omnibus Study 1-52
Capibus
Consumer Monitor
Business Monitor

Northwest Research Group, Inc.
400 108th Ave. N.E., Ste. 200
Bellevue, WA 98004
Ph. 206-635-7481
Fax 206-635-7482
E-mail: Krislau@nwrg.com
http://www.nwrg.com
Kris Lau, Sound Stats Manager
Studies:
Sound Stats

Opinion Research Corporation International
P.O. Box 183
Princeton, NJ 08542-0183
Ph. 800-999-0213 or 908-281-3475
Fax 800-759-5786
E-mail: Caravan@prn.opinionresearch.com
http://www.opinionresearch.com
Judi Lescher, Vice President
Studies:
Caravan®
Teen Caravan
Pre-teen Caravan

Caravan® - National telephone omnibus survey of 1,000 adults conducted weekly, Thursday through Sunday. Preliminary results available on Monday. Full tabulations delivered on Tuesday. CATI interviewing utilizing state-of-the-art RDD sample. In-house professional interviewers and data processing staff. Low cost.
Teen Caravan - National telephone omnibus survey of 250 teens ages 12-17.
Pre-teen Caravan - National telephone omnibus survey of 250 pre-teens ages 6-11.
Please visit our Web site at www.opinionresearch.com
(See advertisement on p. 88)

Angus Reid Group, Inc.
2929 Norwest Center
90 S. Seventh St.
Minneapolis, MN 55402
Ph. 612-904-6970
Fax 612-904-6980
http://www.angusreid.com
Eileen Wolford, Sr. Vice President
Studies:
Angus Reid USA Poll
Canadian National Angus Reid Poll

Roper Starch Worldwide
566 E. Boston Post Rd.
Mamaroneck, NY 10543
Ph. 914-698-0800
Fax 914-698-0485
Gene Henry
Studies:
Limobus

Southeastern Institute of Research (SIR)
2325 W. Broad St.
Richmond, VA 23220
Ph. 800-807-8981
Fax 800-715-3647
E-mail: SIResearch@aol.com
G. William Greer, Dir. Client Services
Studies:
Baltimore Insight
Washington Insight
Richmond Insight
Hampton/Norfolk/Virginia Beach Insight

Strategy Research Corporation
100 N.W. 37th Ave., 3rd fl.
Miami, FL 33125
Ph. 305-649-5400
Fax 305-649-6312
E-mail: strategy@icanect.net
Deborah Gonderil
Studies:
SRC Hispanic Omnibus

Talmey-Drake Research & Strategy, Inc.
P.O. Box 1070
Boulder, CO 80306
Ph. 303-443-5300
Fax 303-447-9386
Paul Talmey, President
Studies:
Colorado Omnipoll

Teenage Research Unlimited
707 Skokie Blvd., Ste. 450
Northbrook, IL 60062
Ph. 847-564-3440
Fax 847-564-0834
E-mail: TRUTEEN@aol.com
Michael Wood
Studies:
Teenage Marketing & Lifestyle Study

The Wagner Group, Inc.
53 W. 21st St.
New York, NY 10010
Ph. 212-627-0066
Fax 212-727-7492
Jeffrey Wagner, President
Studies:
College Scan

Thompson Lightstone & Co., Ltd.
350 Bloor St. E., Ste. 600
Toronto, ON M4W 1H4
Canada
Ph. 416-922-1140
Fax 416-922-8014
E-mail: TLC@tlcl.com
Trina Mitchell, Sr. Rsch. Assoc./Omnitel Mgr.
Studies:
OMNITEL

WestGroup Research
2720 E. Thomas, Bldg. A
Phoenix, AZ 85016
Ph. 602-707-0050 or 800-999-1200
Fax 602-707-0055
E-mail: team@westgroupresearch.com
Ted Apostol, President
Studies:
WestTrack

Youth Research Co.
6822 22nd Ave. N., Ste. 298
St. Petersburg, FL 33710
Ph. 813-384-8182
Fax 813-384-9184
Karen Forcade, President
Studies:
The Youth Rsch. Omnibus - Children
The Youth Rsch. Omnibus - Teens

Advertising

Audits & Surveys, Inc.
Beta Research Corp.
Bruskin/Goldring Research
California Retail Survey
Canadian Facts
Chilton Research Services
ICR/International Communications Research
Leemis Marketing
Macro International, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
Medical Data Management Corp.
NIPO, The Market Research Institute
Opinion Research Corporation International
Angus Reid Group, Inc.
Southeastern Institute of Research (SIR)
Strategy Research Corporation

African-Americans

Marketing Resource Group, Inc.
Angus Reid Group, Inc.

Agricultural

Audits & Surveys, Inc.
Marketing Resource Group, Inc.
NIPO, The Market Research Institute
Angus Reid Group, Inc.

Airlines

Audits & Surveys, Inc.
I.S.I.S.-Integrated Strategic Information Services
NIPO, The Market Research Institute
Opinion Research Corporation International
Angus Reid Group, Inc.
Strategy Research Corporation

Automotive

Audits & Surveys, Inc.
Bruskin/Goldring Research
Macro International, Inc.
Market Opinion Research
Market Trends, Inc.
NIPO, The Market Research Institute
Opinion Research Corporation International
Southeastern Institute of Research (SIR)

Business-To-Business

Behavior Research Center
Beta Research Corp.
California Retail Survey
I.S.I.S.-Integrated Strategic Information Services
Macro International, Inc.
Market Trends, Inc.
NIPO, The Market Research Institute

Cable

CENTRIS
ICR/International Communications Research
NIPO, The Market Research Institute
Opinion Research Corporation International
Strategy Research Corporation

Carpeting

Bruskin/Goldring Research
NIPO, The Market Research Institute
Opinion Research Corporation International

Chemical Industry

Audits & Surveys, Inc.
Marketing Resource Group, Inc.
NIPO, The Market Research Institute

Children

Bruskin/Goldring Research
Macro International, Inc.
Market Facts, Inc.
NIPO, The Market Research Institute
Opinion Research Corporation International
Roper Starch Worldwide
Youth Research Co.

College Students

Macro International, Inc.
Marketing Resource Group, Inc.
The Wagner Group, Inc.
Youth Research Co.

Computers

CENTRIS
I.S.I.S.-Integrated Strategic Information Services
Market Trends, Inc.
NIPO, The Market Research Institute
Opinion Research Corporation International
Angus Reid Group, Inc.
Southeastern Institute of Research (SIR)

Consumer-Canada

Canadian Facts
IMR Research
Innovative Marketing, Inc.
Market Facts of Canada
Market Facts, Inc.
Angus Reid Group, Inc.
Thompson Lightstone & Co., Ltd.

Consumer-Europe

I.S.I.S.-Integrated Strategic Information Services
Macro International, Inc.
MarketResponse International USA, Inc.
Medical Data Management Corp.
NIPO, The Market Research Institute

Consumer-Local

Behavior Research Center (AZ)
California Retail Survey (CA)
Canadian Facts (ON)
Market Trends, Inc. (WA)
NIPO, The Market Research Institute (Netherlands)
Southeastern Institute of Research (SIR) (VA,MD)
Strategy Research Corporation (FL)
Talmey-Drake Research & Strategy, Inc. (CO)
WestGroup Research (AZ)

Consumer-U.S.

Audits & Surveys, Inc.
Beta Research Corp.
Irwin Broh & Associates
Bruskin/Goldring Research
Chilton Research Services
Custom Research Inc.
Dittman Research Corp. of Alaska
ICR/International Communications Research
IMR Research
Interviewing Service of America, Inc.
Market Facts, Inc.
Market Trends, Inc.
NFO Research, Inc.
Northwest Research Group, Inc.
Opinion Research Corporation International
Angus Reid Group, Inc.
Roper Starch Worldwide
Strategy Research Corporation

Dental

Market Measures, Inc.

Direct Mail

Market Facts of Canada
Angus Reid Group, Inc.

Entertainment

Audits & Surveys, Inc.
Bruskin/Goldring Research
CENTRIS
Chilton Research Services
I.S.I.S.-Integrated Strategic Information Services
Market Trends, Inc.
Opinion Research Corporation International
Angus Reid Group, Inc.
Southeastern Institute of Research (SIR)
Strategy Research Corporation

Environmental

Audits & Surveys, Inc.
Bruskin/Goldring Research
Market Trends, Inc.
Marketing Resource Group, Inc.
Opinion Research Corporation International
Roper Starch Worldwide

Eyecare/Eyewear

Market Measures, Inc.
NIPO, The Market Research Institute

Executives

Market Facts, Inc.
NIPO, The Market Research Institute

Financial

Bruskin/Goldring Research
Canadian Facts
Macro International, Inc.
Market Facts of Canada
Market Trends, Inc.
NIPO, The Market Research Institute
Opinion Research Corporation International
Angus Reid Group, Inc.
Southeastern Institute of Research (SIR)
Strategy Research Corporation
WestGroup Research

Food/Beverage

Audits & Surveys, Inc.
Bruskin/Goldring Research
California Retail Survey
Canadian Facts
Chilton Research Services
Custom Research Inc.
Macro International, Inc.
Market Facts of Canada
Market Trends, Inc.
NIPO, The Market Research Institute
Opinion Research Corporation International
Angus Reid Group, Inc.
Southeastern Institute of Research (SIR)
Strategy Research Corporation

Gaming

Market Trends, Inc.
Marketing Resource Group, Inc.
Angus Reid Group, Inc.
WestGroup Research

Health Care/Medical

Audits & Surveys, Inc.
Beta Research Corp.
Irwin Broh & Associates
Canadian Facts
Macro International, Inc.
Market Measures, Inc.
Market Opinion Research
Market Trends, Inc.
Marketing Resource Group, Inc.
Medical Data Management Corp.
NIPO, The Market Research Institute
Opinion Research Corporation International
Southeastern Institute of Research (SIR)
WestGroup Research

Hispanic

Behavior Research Center
Marketing Resource Group, Inc.
Angus Reid Group, Inc.
Strategy Research Corporation

Insurance

Bruskin/Goldring Research
Market Trends, Inc.
Marketing Resource Group, Inc.
NIPO, The Market Research Institute
Opinion Research Corporation International
Southeastern Institute of Research (SIR)

International

Behavior Research Center
I.S.I.S.-Integrated Strategic Information Services
Macro International, Inc.
NIPO, The Market Research Institute
Angus Reid Group, Inc.

Internet Users

Greenfield Online

Latin America

Behavior Research Center

Lodging Industry

Bruskin/Goldring Research
Market Trends, Inc.
Opinion Research Corporation International
Angus Reid Group, Inc.
Southeastern Institute of Research (SIR)
Strategy Research Corporation

Media

Audits & Surveys, Inc.
Bruskin/Goldring Research
Canadian Facts
CENTRIS
Macro International, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
NIPO, The Market Research Institute
Opinion Research Corporation International
Angus Reid Group, Inc.
Southeastern Institute of Research (SIR)

Mothers

Bruskin/Goldring Research
Macro International, Inc.
Market Facts of Canada
Market Facts, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
NIPO, The Market Research Institute
Strategy Research Corporation
Youth Research Co.

Office Products

California Retail Survey
Market Trends, Inc.
NIPO, The Market Research Institute
Angus Reid Group, Inc.

Pet Foods

Canadian Facts
Opinion Research Corporation International

Pharmaceutical

Audits & Surveys, Inc.
Canadian Facts
Market Measures, Inc.
Medical Data Management Corp.
NIPO, The Market Research Institute
Opinion Research Corporation International

Political Affairs

Audits & Surveys, Inc.
Canadian Facts
Market Trends, Inc.
Marketing Resource Group, Inc.
NIPO, The Market Research Institute

Promotions

Innovative Marketing, Inc.
Market Trends, Inc.

Public Policy Issues

Audits & Surveys, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
NIPO, The Market Research Institute
Angus Reid Group, Inc.
Southeastern Institute of Research (SIR)

Restaurants/Fast Foods

Audits & Surveys, Inc.
California Retail Survey
Canadian Facts
Macro International, Inc.
Market Trends, Inc.
NIPO, The Market Research Institute
Opinion Research Corporation International
Strategy Research Corporation

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Listing Additions

In all 1997 directory listings for San Diego Surveys an incorrect phone number has been listed. The correct number is 800-895-1225.

Please add the following firms to the 1997 Directory of Telephone Interviewing Facilities:

TelAc - Telephone Access, Inc.
2200 Clarendon Blvd., Ste. 1109
Arlington, Va., 22201
Ph. 800-522-3447
Fax 703-528-7117
Christopher Purdy
200-100-100-100

Universal Survey Center
29 W. 38th St.
New York, NY 10018
Ph. 212-391-5243
Fax 212-391-5428
E-mail: universalsc@worldnet.att.net
Michael Lefkowitz, Vice President
100-100-100-100

Please add the following firm to the 1997 Directory of Focus Group Facilities:

Research & Polling, Inc.
5140 San Francisco Rd. N.E.
Albuquerque, NM 87109
Ph. 505-821-5454
Fax 505-821-5474
Stephanie Reiskin, Special Projects Manager
Location: Free-standing building
CR, OR, VE
1) 18x18 Obs. Rm Seats 14

Please note the correction to the following listings from the 1997 Directory of Focus Group Facilities (corrected text shown in bold):

On p. 90, in the listing for Project Research, Inc., the E-mail address should read: **PRI@projectresearch.com**. Please add the Web address: http://www.projectresearch.com.

On p. 148, in the entry for Savitz Research Center, Dallas, the **observation capacity** of rooms 3 and 4 should be **20**, not 6.

Trade Talk

continued from p. 94

gether, there were usually five or six respondents in the discussion (some people ducked in and out to take care of more pressing matters). As Yoffie led us through the topics, which ranged from how much time we spend on the Web to our opinions of on-line research, most respondents "spoke" in brief but complete thoughts. Each of the topics could have sustained several hours of discussion but we bounced around a lot, just to get people used to chatting on-line.

While I've visited a few chat rooms over the years, I'd forgotten how having to quickly type your thoughts forces you to choose your words carefully. Unless you're Mavis Beacon, your fingers can't always keep up with the flow of ideas. You also have to follow other respondents' comments while formulating your own.

My fellow respondents and I weren't shy about expressing ourselves and, as in a standard focus group, several mini conversations flared up. I didn't envy Yoffie having to keep a handful of smart aleck researcher types on-task. But she did a nice job, assuring us later that during a "real" on-line group, the discussion is much more controlled.

Here's a sample of the dialogue, taken from the transcript (clients receive a raw transcript as soon as the session is over and a formatted one two days later):

```
Mon May 19 16:44:55 1997: Amy says, "LET'S TRY TO GET EVERYONE INTO A NEW TOPIC NOW."

Mon May 19 16:44:58 1997: Carlgel says, "Hmmm, so we are just one disorderly bunch, eh?"

Mon May 19 16:45:00 1997: Stnee says, "Also there is a difference in a group from what we are doing now. usually everyone is responding to the moderator's questions - not asking their own"

Mon May 19 16:45:11 1997: Ryder says, "blame the moderator!:smirk"
Mon May 19 16:45:17 1997: Amy says, "THAT'S THE TRUTH!"

Mon May 19 16:45:20 1997: Carlgel laughs hysterically.

Mon May 19 16:45:30 1997: Maran says, "That's what happens when you get a bunch of market researchers together!"

Mon May 19 16:45:32 1997: Amy says, "BUT STNEE IS BLAMING THE PARTICIPANTS, I THINK!"

Mon May 19 16:45:33 1997: Amy laughs hysterically.

Mon May 19 16:46:12 1997: Amy says, "HAS ANYONE SHOPPED FOR SOMETHING ONLINE, REGARDLESS OF WHETHER YOU BOUGHT ANYTHING?  IF SO, WHAT?"

Mon May 19 16:46:16 1997: Ryder says, "yes ma'am"

Mon May 19 16:46:20 1997: Carlgel says, "Yep"

Mon May 19 16:46:23 1997: Bwalk says, "Sure!"

Mon May 19 16:46:26 1997: Amy says, "WHAT DID YOU SHOP FOR?"

Mon May 19 16:46:29 1997: Laughlin says, "yes, Amazon.com is great"

Mon May 19 16:46:31 1997: Carlgel says, "My computer!"

Mon May 19 16:46:44 1997: Ryder says, "difficult to obtain CDs by obscure bands"

Mon May 19 16:46:45 1997: Carlgel says, "Actually bought it online from Gateway!"

Mon May 19 16:47:08 1997: Stnee says, "i used the internet to find a flower shop and then ordered by telephone"
```

A site within a site

The highlight of the evening was when we "followed" Yoffie to the Web site for the city of Westfield, N.J. By typing [/follow amy] I was on my way, my journey confirmed on the screen with the line:

```
Ryder leaves, heading for westfield, nj web site, following Amy.
```

In a window at the top of my screen I could see and explore the Westfield civic Web site while monitoring the focus group discussion in the window below. I had some trouble navigating my way to the site, as did a few others, but it was worth the trip. For while the Westfield site was dull, if well-meaning, containing page after page of text on everything you never wanted to know about the bustling New Jersey burg, it was an eye-opening example of what will eventually be one of the real strengths of on-line research: the ability to expose a group of far-flung respondents to almost any type of material, from package prototypes to TV commercials.

While it's already possible to show complex graphics to on-line respondents, current technology can make it a time-consuming endeavor. But as data transfer speeds increase and the graphics-handling capability of computers improves, there's almost no limit to the kinds of things researchers can test on-line.

Lots of potential

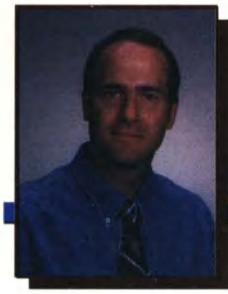
Before doing the group I was already sold on the potential of on-line research — as long as marketers keep in mind that, like any technique in its nascent stages, it's still being defined and refined.

All in all, I was impressed. The whole process was pretty intuitive, though at this point in its evolution, Web qualitative is probably best conducted with the online savvy, people who are familiar with on-line terms and features like chat rooms, Web sites and links. Otherwise I imagine it might all be a bit bewildering.

The experience left me feeling energized, partly due to the good humor of the other participants and partly the thrill of doing something new and different. When things go smoothly, I'm sure anyone who participates in on-line research would feel the same way.

I'm now more convinced than ever that on-line research could be a much-needed shot in the arm for an industry that's battling Caller ID, sugging and other contributors to declining cooperation rates. It's not going to make any other techniques obsolete but it's a nice addition to the information-gathering arsenal.

And it's probably wishful thinking to hope that a consumer who has a good time in an on-line group might be more willing to participate in some other kind of research the next time they're asked. But as long as providers keep the process fun and informative for respondents, they'll engender goodwill toward the research process — which might be an unexpected but welcome benefit of this exciting new research approach. ❑



Trade Talk

By Joseph Rydholm/QMRR editor

Stepping into cyberspace in the name of research

This being our first on-line research issue, I thought it might be fun to write about what it's like to participate in an on-line focus group. So I E-mailed Amy Yoffie — whose company, Research Connections in Westfield, N.J., has been doing on-line research for years — to see if I could sit in on one of her firm's groups. As it turns out, several clients had expressed the same interest, so Research Connections decided to hold a mock group for us.

Or, as Yoffie said in her reply: "A number of our colleagues have been intrigued by this new research methodology and requested to observe a group in action. Knowing that most groups we conduct are proprietary, we thought we'd turn the tables and invite YOU to be a participant in an on-line focus group with other market research professionals."

After settling on a convenient date and time, Yoffie E-mailed each of us a note of confirmation. About three weeks before the group, I got a nice welcome letter (via snail mail) and a diskette with some software that I would need for the session. As instructed I visited the Research Connections Virtual Focus Facility 24 hours prior to the group to make sure the software worked.

Bound for cyberspace

At last, the day arrived. The group was set to start at 6:00 p.m., so I logged into the Virtual Focus Facility at about 5:55. I was excited to find fellow respondents already in the discussion room, testing their legs, as it were, in cyberspace. Each of us had been assigned a password and screen name (mine was Ryder). Yoffie was there as moderator, along with an administrator to handle any technical questions or issues that arose.

She began with some instructions to the newcomers as we logged in, helping us, for example, maximize our screen size for best viewing and also to locate some added features. One of those features was an "emotion box" that was part of a software plug-in that hadn't loaded properly (I'll blame that on the cantankerous Compaq I was using). By clicking on the many buttons in the emotion box, respondents can enhance their typed responses with things like a laugh or a smirk. While those buttons weren't available to me, Yoffie reminded me that I could accomplish the same thing by typing [:laugh] and hitting the enter key, which would result in an entry like "Ryder laughs" in the dialog stream.

Yoffie explained the ground rules, asking us type our comments in lowercase letters (hers would be in uppercase so they would stand out more). She encouraged us to type as much as we wanted and reminded everyone that spelling didn't count.

Throughout the 90 or so minutes that we were on-line to-

continued on p. 93

Farcus

by David Waisglass
Gordon Coulthart

"He tends to over-simplify."

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