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July 1998

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Review

Internet research issue

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- ***Case histories featuring Nickelodeon, Bay Networks, Informix***
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C O N T E N T S



Volume XII, Number 7

July 1998

Our second annual on-line/Internet research issue features a wide range of stories on the burgeoning world of on-line research.

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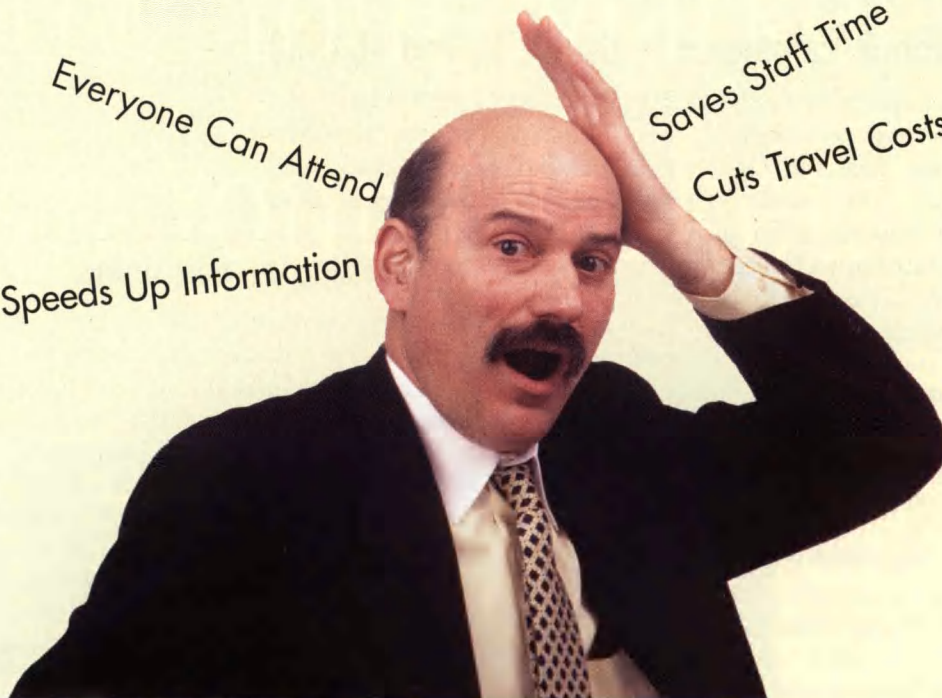
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Study predicts e-commerce to double by end of 1998

According to a survey of 120,000 North American consumers conducted by Forrester Research, Inc., Cambridge, Mass., the number of households that shop and invest on-line — a high-income, technology-optimistic elite — will double from 5 percent to 10 percent by the end of 1998. On-line connections and PC ownership will soon broaden to include low-income households, generating the next wave of e-commerce-ready consumers. Data is drawn from Forrester's Technographics '98 Field Study of North American consumers, conducted with NPD Group in the fall of 1997.

Using a segmentation scheme it calls Technographics, Forrester segments consumers by primary technology motivation, attitude toward technology, and disposable income. Technographics further segments consumers according to three motivators: family, career, and entertainment.

"We're seeing a real paradigm shift in that PC ownership today is defined by one's attitude toward using technology and not based on income," says Josh Bernoff, principal analyst in Consumers & Technographics Strategies at Forrester. "Mass marketers must prepare for a much more economically diverse on-line community."

Currently, 43 percent of households own at least one PC and 25 percent of North Americans are on-line — mostly those who score highest on income, technology optimism, and frequent PC use. However, the research indicates the growing on-line community will be far more heterogeneous than the current e-commerce participants. Only 23 percent of low-income optimists are currently on-line, but strong interest in applications like Web browsers and

chat will push that number to 29 percent by the end of 1998. However, Forrester finds these consumers, who lack funds and PC experience, aren't

yet ready for electronic commerce. New e-commerce participants will come from three groups: those who say they are ready to buy on-line,

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Profiling e-mail users

Cyber Insider, a newsletter from Cyber Dialogue and Yankelovich Partners Online, reports that despite the current media focus on the World Wide Web, by far the most widely-used Internet application is, and appears set to remain, e-mail. And while estimates of e-mail usage vary dramatically—from the cyberdialogue/findsvp American Internet User Survey's conservative figure of 23.2 million users (a number that does not include intranet and university users) to the Electronic Mail and Messaging Systems' more liberal estimate of 93.5 million — it is clear that as the number of e-mail addresses continues to grow, so too will e-mail's importance as a commercial marketing vehicle.

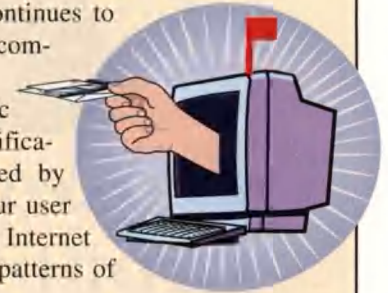
The rapid mainstreaming of electronic messaging implies a corresponding diversification of its user base. Research conducted by cyberdialogue/findsvp suggests that the four user segments identified through the American Internet User Survey are closely bound to specific patterns of business and personal use.

"Heavy Daily Users" of e-mail, those who send 12 or more messages a week, devote some 40 percent of their 15.2 weekly hours to electronic mail, while "Infrequent Users" apply just 18 percent of their 6.7 hours to reading and writing e-mail. Not surprisingly, e-mail usage is particularly concentrated among the small and home business operators who account for nearly three-quarters of "Heavy Daily Users."

Naturally, the sending and receiving of e-mail is also industry-dependent, with "high-tech" accounting for one in five of all daily e-mail users. The penetration of e-mail in technology-driven sectors is such that some 78 percent of employees in high-tech companies qualify as daily users. Other industries with relatively high levels of daily e-mail usage include education, government, and finance.

In spite of these usage variations, e-mail users report a uniformly high degree of satisfaction with the medium: 95 percent of all e-mailers rated the overall ease of use of e-mail positively, and over 90 percent of users gave "service reliability" and "monthly cost" a favorable review. Even such a potentially problematic operation as file transfers and the dreaded issue of technical support were nonetheless rated positively in the cyberdialogue/findsvp survey.

The level of consumer satisfaction, combined with the rapid spread of e-mail technologies throughout important industry sectors, indicates that, one way or another, e-mail is becoming an ever more important part of our lives. Indeed, in 1998, the U.S. Postal Service is set to offer such e-mail authentication services as postmarking, return receipt stamps, and certified or registered e-mail. For more information call 212-255-6655.



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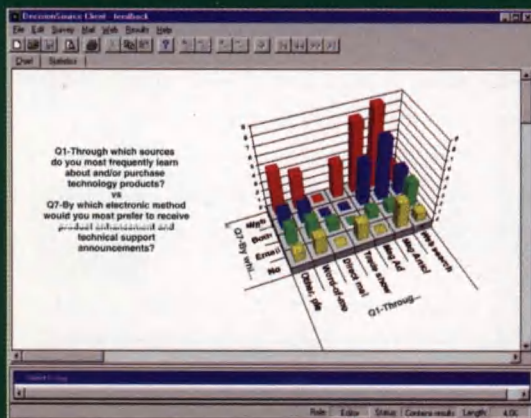
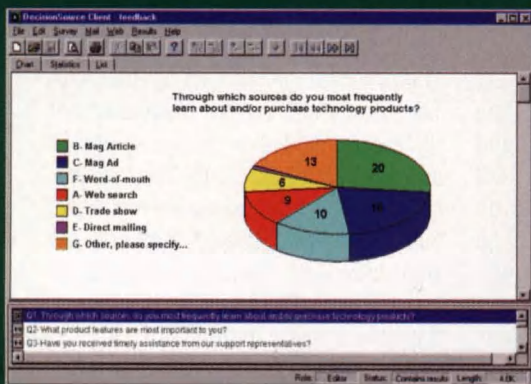
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StatSoft product adds query technology

StatSoft, a Tulsa, Okla., data analysis software firm, is licensing the patented query technology of Business Objects, a San Jose, Calif., provider of integrated enterprise decision support tools, to deliver a new data mining product, BUSINESSQUERY for STATISTICA.

The new STATISTICA add-on software package combines the query technology from Business Objects with StatSoft's STATISTICA statistics and graphing software. BUSINESSQUERY for STATISTICA provides companies with access to corporate-wide database information as well as the ability to link corporate data with an array of analytical techniques.

Many companies have enormous and often multiple databases in different formats, and getting information in order to perform analyses usually requires expertise in structured query language (SQL) and open database connectivity (ODBC). The need for this expertise is eliminated when using BUSINESSQUERY for STATISTICA, because the Business Objects query technology allows the user to query databases using common business language and a graphi-

cal user interface.

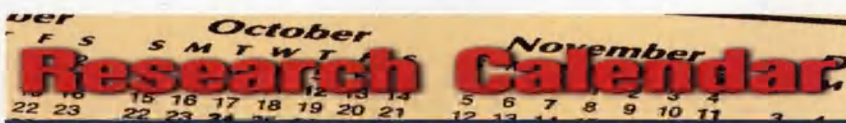
With BUSINESSQUERY for STATISTICA, users can query databases regardless of the underlying format (e.g., Access, Oracle, MS SQLServer, etc.) within a graphical environment, using terms with which they are familiar. They can create simple or complex queries and the data will appear in a STATISTICA spreadsheet for further analyses. For

more information, visit the StatSoft Web site at www.statsoft.com or call 918-749-1119.

Soup-to-nuts Internet search tutorial published

The WebTools Company, Vermillion, S.D., has released a

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AMA RESEARCH CONFERENCES:

The American Marketing Association will hold its marketing research conference and trade show on September 13-16 at the Chicago Hilton & Towers. On November 8-10, the AMA will hold its agribusiness marketing research conference at the Hyatt Regency Hotel on Hilton Head Island, S.C. For more information call 800-AMA-1150 or visit the organization's Web site at www.ama.org.

ESOMAR CONGRESS '98: The European Society for Opinion and Marketing Research (ESOMAR) will hold its annual congress in Berlin on September 13-16. Themed "The Power of Knowledge: From Research Findings to Marketing Intelligence," the congress will include presentations

and a trade show. For more information call 31-20-664-2141, send an e-mail to seminars@esomar.nl or visit the organization's Web site at www.esomar.nl.

STATISTICS IN SENSORY EVALUATION WORKSHOP:

Tragon Corp., a Palo Alto, Calif., research firm, will conduct a workshop entitled "Statistics and Measurement in Sensory Evaluation" from October 5-7. The program will be held in Palo Alto. The workshop covers measurement techniques and their analysis; design and analysis of difference tests; analysis of categorical and scaled response; factor analysis. Related methods are also discussed. For more information call 650-365-1833 or visit the Tragon Web site at www.tragon.com.



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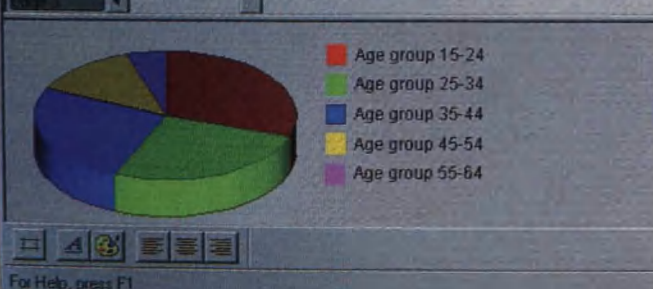
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	Fast food	13.00	19.00	19.00
	French	3.00	7.00	7.00
	Greek	10.00	13.00	23.00
	Indian	0.00	1.00	0.00
	Pizza	1.00	4.00	3.00
	Pub	9.00	8.00	15.00
Other	8.00	9.00	22.00	
What type of music do you like?	Soul/Blues	17.00	31.00	35.00
	Classical	2.00	11.00	15.00
	New Age/Ambient	9.00	27.00	30.00
	Jazz	1.00	2.00	6.00
	Pop/Chart	0.00	0.00	0.00



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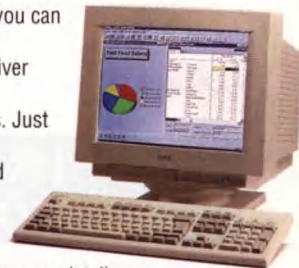
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Names of Note

Karen (Kacie) Best has joined



Best

RHi, a full-service research firm based in Overland Park, Kansas, as senior associate.

Charlotte Sibley, formerly senior director, business information and analysis with Bristol-Myers Squibb, has been chosen to head the new U.S. headquarters of *Isis Research plc* in Princeton, N.J., as president, *Isis*

Americas. She was also elected to the board of directors of *Isis Research plc*.

Alan B. Kessler has been named executive vice president at *Peter Honig Associates*, a White Plains, N.Y., research firm.

Cortney Garner has been named project manager at *MRT Service Inc.*, an Atlanta-area transcript and report writing service.

Houston Certified Research, formerly Houston Consumer Research, has promoted **Lois Vinson** to manager of the Alameda mall facility.

Karen Snapp, vice president for customer and consumer insights at *Frito-Lay*, has been named to the

advisory board of the *University of Texas at Arlington's* Master of Science in Marketing Research degree program.

Jim Langendorfer has been named acting president of *Elrick & Lavidge*, an Atlanta research firm. He replaces **Jeff McWey**.

Jeffrey Peel has been named vice president, information technologies sector research and consulting, at *Response Analysis*, Princeton, N.J.

Rockwood Research, New Brighton, Minn., has added **David Rachac** as director of operations and **Stephen Schelb** as project director.

Bob Ceurvorst and **Nan Martin** have been promoted to senior vice president in the Arlington Heights, Ill., office of *Market Facts, Inc.*

Osama Khidir has joined *Intelligent Marketing Systems, Inc.*, Minneapolis, as senior marketing statistician.

The Marketing Research Association, Rocky Hill, Conn., has announced its 1998-1999 board members. Installed to the board are: **Donald Marek Jr.** of Southwestern Bell Telephone Co., St. Louis, as president; **Joanne Robbbaro** of Lieberman Research Worldwide, Los Angeles, as president-elect; **Judith Hominy** of Pat Henry Market Research, Inc., Cleveland, as vice president; **Carl Iseman** of Assistance in Marketing/Baltimore, Towson, Md., as treasurer; **Judy Dyer** of Yankelovich Partners, Norwalk, Conn., as secretary; and **Elyse Gammer** of Dennis and Company, Stamford, Conn., as immediate past president. Installed as directors at large are: **Paula Crimmins** of

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PeopleSoft Inc., a provider of enterprise applications software, has selected Mountain View, Calif.-based **Decisive Technology's** EnterpriseView Program (EVP) to deploy a company-wide customer feedback system to gather customer information in real time. The Internet-based survey solution and professional services obtained through Decisive Technology will collect information from PeopleSoft's 2,200 customers worldwide.

Miami-based **Interface Technologies, Inc.**, a data capture service bureau, has changed its name to Outsource Business Services, Inc. The company focuses on mailing fulfillment, database management, scanning, and document imaging.

WMB & Associates, an Apopka,

Fla., research firm, was recommended by Orlando's economic development group to the Mayor's office and commissioned to develop and interpret community issues surveys for the Orlando area. Questionnaires will be sent to the majority of area households focusing on safety, communication, transportation, and lifestyles. The results will help the Mayor's office gauge citizen opinion and give a report card on key issues in progress.

PerformanceData, a Chicago-based provider of information for database marketing, has expanded and reorganized its sales force, adding a regional senior account executive in New York City, an in-house sales representative in Chicago, and creating a sales support group in Chicago.

Isis Research plc, a global health care research firm, has opened its U.S. headquarters at Research Park, 2 Wall St., Princeton, N.J., 08540. Phone 609-688-0474. Fax 609-688-0435.

Olchak Market Research, Greenbelt, Md., has opened a new downtown Washington, D.C., focus group facility at 900 17th St. N.W., Ste. 650. The new facility features a tiered viewing room seating 12 and equipped with individual telephone and electrical outlets, a private client lounge; and a one-on-one room with viewing for six. For more information call 301-441-4660.

NFO Worldwide, Inc., Greenwich, Conn., reported a 20 percent increase in first-quarter revenues, to \$50.2 million compared with \$42.0 million for the same period last year. Net income increased 6 percent to \$2.5 million from \$2.4 million in the year-ago quarter.

SOFRES Intersearch, the Horsham, Pa.-based U.S. headquarters of the Taylor Nelson Sofres group, has acquired **Chilton Research Services (CRS)**, Radnor, Pa. CRS will be combined with SOFRES Intersearch and will be led by Bruce Shandler, current president and CEO of SOFRES Intersearch.

Two research and consulting firms, **Maritz Marketing Research Inc.**, St. Louis, and **Keene/Paison & Co.**, Indianapolis, have formed Market Power, a research and consulting alliance serving the utility industry. For more information call 800-446-1690.

Exchange Applications, Inc., a Boston database marketing and software firm, and its client, INVESCO Funds Group, a Denver-based mutual fund firm, have won the "Best Data

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Warehouse Application" award from the Data Warehousing Institute.

The Arbitron Company, New York, has purchased the radio station, advertiser/agency and international assets of Tapsan, Inc., a Birmingham, Ala.-based developer of software for broadcasters, agencies, and advertisers. Terms were not disclosed.

Sky Alland Marketing, Columbia, Md., has consolidated its Wisconsin-based customer call centers. The company will relocate its Sheboygan operations to its new customer communications center at 4915 S. Howell Avenue in Milwaukee. All of the company's 45 Sheboygan-based associates have been offered positions at the new facility.

CLT Research Associates, Inc., New York, has extended its market research business to include a division devoted primarily to market mix modeling. The new initiative will be headed by Arthur J. Christiani, who has

been appointed as a senior vice president of the company.

Assistance in Marketing, Inc., Baltimore, has completed a comprehensive renovation of its Towson, Md., focus facility. The renovations include tiered seating in the client viewing rooms, lighted work surfaces, a new client lounge equipped with computer and Internet access. For more information call 410-337-5000.

Nordhaus Research Inc., Southfield, Mich., has merged with Research Data Analysis.

Market Probe, Inc., Milwaukee, Wis., has established a new business unit, the Business Research Center, at 2655 North Mayfair Rd. The Center will assist businesses with general consumer research, market feasibility studies, crisis intervention, research to support strategic planning initiative, and organizational studies involving employee satisfaction and business process design. Chris Plumb has been

named primary project director of the Center. For more information call 414-778-6000.

Philadelphia-based **Marketing Systems Group** has opened two new offices. The first is at 301 S. 68th St., Lincoln, Neb., 68510. Phone 402-489-0000. Fax 215-653-7115. The second is at 615 S. Catalina Ave., Suite 328, Redondo Beach, Calif., 90277. Phone 310-543-9003. Fax 310-543-2484. The firm also announced that it has installed its PRO-T-S telephony systems in numerous interviewing sites.

MRT Services, Inc., a transcript and report writing firm, has moved to new offices in the Atlanta area at 2890 Tig Knight Rd., Loganville, Ga., 30052. Phone 770-554-6775. Fax 770-554-5660.

Houston Certified Research (formerly Houston Consumer Research) has added a toll-free number, 800-527-9004, for the convenience of its clients.

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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. He can be reached at 818-782-4252 or at arishulman@aol.com.

Mark Balkman of Aid Association For Lutherans, which provides financial services for Lutherans, reports conducting qualitative interviews with couples on a new annuity product. One couple consisted of Carol and her husband John. Carol was quite outspoken and had very strong and eloquent opinions of the new product. John hardly said a thing. Carol was always willing to share her attitudes and feelings. But no matter how hard Balkman tried, he could not get John to say anything. Typically, when he'd ask John a question, Carol would pop in with her answer. He kept directing questions at John, but John simply refused to answer.

Finally, Balkman focused his eyes directly at John and asked his next question. Again, John said nothing. He looked at Balkman. Balkman looked at him. Balkman waited for what seemed to be an eternity, and yet John said nothing. After a while, Carol could no longer stand the pressure on her poor husband and stepped in to "rescue" him by sharing her thoughts, providing a well thought-out and articulate viewpoint.

The moment she finished, John looked up at Balkman and said, "That's what I was going to say."

Annette Abraham, who formerly ran

a focus group facility, tells about recruiting Porsche owners for focus groups. Her recruiters were having difficulty getting through to prospective participants — high-powered executives. So Abraham took matters into her own hands. She called the office of a Porsche owner whose secretary had stonewalled the prior recruiter. When the gatekeeper again denied Abraham's request, Abraham said, "Listen, honey. This concerns talking to him about his Porsche. Get him on the line." The next thing Abraham knew, the man was on the line, and eagerly agreed to be a respondent to talk about one of the things he loved best in the world — his Porsche.

On the day of the focus groups, Abraham watched from her second-floor office as respondents arrived in the parking lot. Without exception the Porsche owners drove around the fairly crowded lot, looking for spots where no one was parked on either side.

During the session, the possibility of discontinuing a certain Porsche model was brought up. The respondents all agreed that if that happened, the group, consisting of well-to-do professionals, would buy the discontinued models and stockpile them. After the group ended and the moderator left, the respondents all stayed around for an hour to compare notes on their Porsches.

Not to be outdone, Abraham's husband, Harry Heller of Heller Research, tells about his own experience with fanatical respondents during some focus groups he conducted almost 15 years ago on computers. A focus group

of Apple Computer owners was conducted from 6 p.m. to 8 p.m., at which time the session was ended so he could go on to his next group — owners of IBM and compatible computers. When Heller completed the second session, he had a fairly lengthy debriefing with his client, and finally left to go home, at well past 11 p.m. On his way to the parking lot Heller noticed all of the Apple owners were still in the parking lot, discussing computers. He concluded that they weren't necessarily lonely, but were so happy to find kindred spirits that they all decided to continue the discussion on their own.

Valerie Deaton of Response Analysis tells about conducting her very first focus group more than a decade ago. She was in her mid-20s at a large insurance company after having worked and trained at ORC for four years. Participants were in their late 60s. The product under discussion was a combination long-term care and annuity product.

Deaton was very nervous about having 15 very high-level clients behind the glass for her first group. When talking about an insurance rider for "skilled care" facilities, Deaton reversed the beginning letters of each word, calling them "scared kill" facilities. In the back room, the clients erupted with laughter. The participants weren't laughing, however. Deaton felt this was because they didn't catch her error, not because they didn't think it was funny. (*Or at least she hopes that was the case!*-Ed.)

Deaton says she could have just died, so to speak. □

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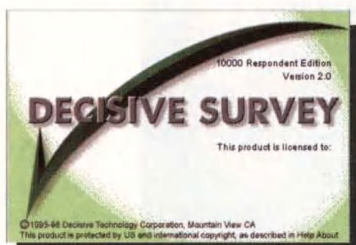
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High-tech surveys have arrived

A review of software for interviewing on the World Wide Web and with a PC



Decisive Survey for Windows Sensus Multimedia for Windows SurveySaid for Windows



By Steven Struhl and Chris Kuever



Editor's note: Steven Struhl is vice president, senior methodologist, and Chris Kuever is vice president, director of data processing, at Total Research, Chicago. Struhl can be reached at SMStruhl@aol.com (faster) or Sstruhl@totalres.com. Kuever can be reached at Ckuever@totalres.com.

The fine art of writing interviews is getting more complicated. As in many other areas of life, we have computers to thank for this. It seems that interviewing, any minute now, will step onto the World Wide Web in a big way. (Have we heard this enough times before? This time, though, it seems true.) Other new software will allow your PC to do interviews with all sorts of striking multimedia abilities. High-tech surveys have arrived.

For those of you who just mastered a CATI system, or are still struggling with one, or want to stay with paper-and-pencil interviews, these new technologies may not sound like the greatest news of the decade. Fortunately, PC software has become more intelligent, not just more complicated. Using new software can be quite a different experience from what you might have expected just a few years ago. Now you sometimes can start using something both new and technological without much of a learning curve

(i.e., a period in which approximately nothing works and you live in non-comprehension and terror).

You may find the best of new software, even if it requires you to pick up some new concepts, is surprisingly intuitive. ("Intuitive," another term with special computer connotations, means — more or less — that the software does not behave in remarkably unexpected, bizarre, or repellent ways too often.) In some cases, you can nearly get new software to work right out of the shrink-wrap. Given the recent history of high-tech, that's amazing.

We will discuss three software packages in this review. Because PC applications, and the Internet in particular, are burgeoning, you can find many, many other applications that try to do the same things. It is more than possible that we have missed your favorite application, or some promising new contender. These three applications really work, though, and have proven themselves under fire with extensive in-the-field use. Below, we have a brief paragraph on each, and then we will get on to the main reviews.

Sensus Multimedia by Sawtooth Technologies is (as the name suggests) the multimedia PC-based package. For those of you not versed in the new terminology, multime-

continued on p. 72

Turning to a virtual campus for a real education



Editor's note: James Fong is the director of Penn State University's Outreach Office of Marketing Research.

The Age of Technology and the impact of the Internet and global telecommunications have dramatically changed the face of education. In addition, demographic shifts

have created a new demand for continuing education or "lifelong learning." The non-traditional student, typically over 25 years of age and not living on a college campus, is now a mouse-click away from earning college credits, advanced degrees, and certificates of achievement via the Internet. These students now have access to on-line courses and programs from hundreds

of colleges, universities, and private institutions, including Penn State University. The Penn State system consists of 24 campuses, including a medical and law school, located throughout Pennsylvania. Its newest campus is the World Campus, the university's entry into the virtual campus arena.

Two years ago, Penn State began

Penn State University conducts multi-level research to launch its on-line campus

By James Fong

developing a strategy for how it would compete for students in this brave new world. The university chose not to offer typical programs — which would be subject to significant competition — but to offer signature programs in which it could be a dominant player.

Given the drastic changes in education and the Internet, many pitfalls stood before Penn State in launching its World Campus. Poor marketing, developing an ineffective product, or not meeting the customers' needs could hurt the university's national reputation, as well as demoralize the faculty and staff in future efforts to provide on-line education. There were also limited marketing dollars. In short, good decisions were essential.

A single mode of research wouldn't be sufficient to answer the many questions facing the university. There

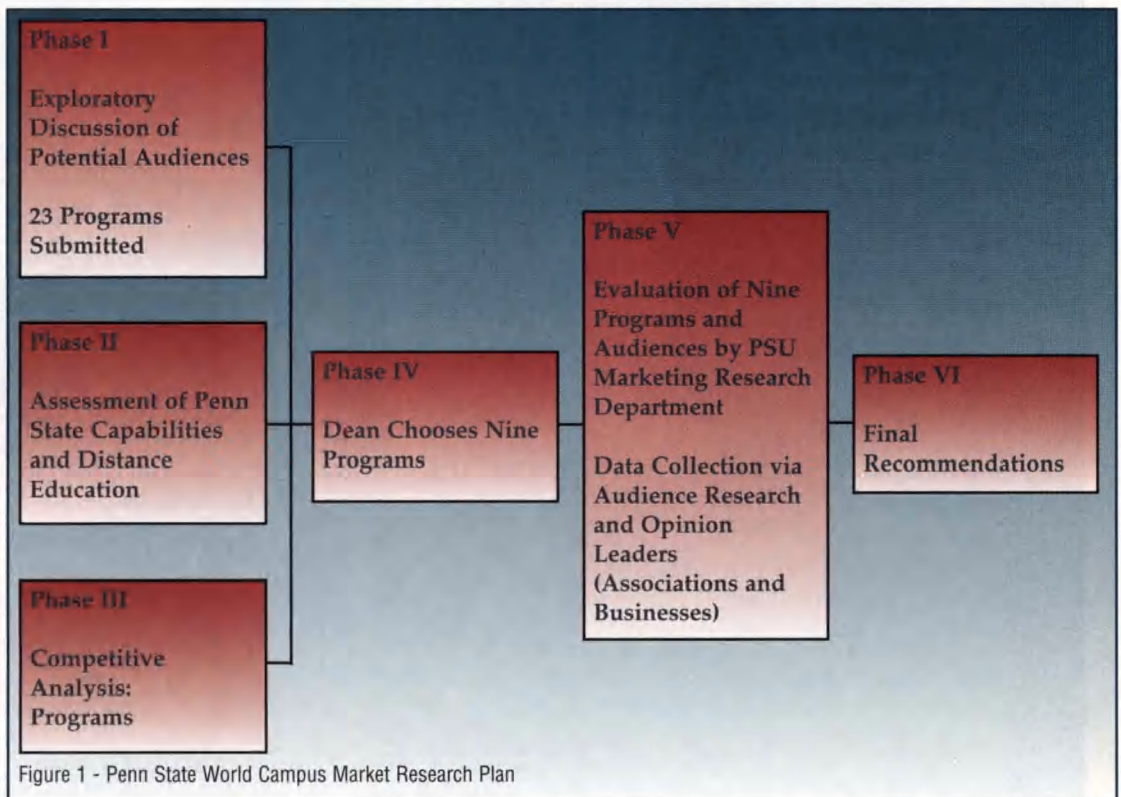
assessment surveys, and industry and competition studies helped guide the way. Measuring internal readiness was especially critical, since favorable market conditions were useless without a willing and ready faculty.

High quality instruction

In the spring of 1997, faculty submitted 23 programs for consideration, including programs in anesthesia, turf-

through World Campus.

Figure 1 shows the market research system to assess which programs would be delivered through the World Campus. The deans of the Penn State academic colleges worked together and, using a rating system, reduced the number of programs from 23 to nine for consideration for January or September 1998 delivery (Figure 1,



were questions on customer demand, technical readiness of the audience, faculty readiness, the ability of the student to pay, the competitive environment, program reputation, partnership potential with corporations and associations, marketing reach, and program pricing. In-depth interviews with associations and business leaders, need

grass management, chemical dependency counseling, engineering, geographic information systems (GIS), dietary systems and nutrition, material sciences, and child care. With a goal of developing three programs for January 1998 and at least three for fall 1998, the plan was to deliver an interactive, high quality mode of instruction

Phase I).

Phase II of the research consisted of identifying Penn State's program strengths and finding information and demographics on Internet trends. It was also critical to understand the needs of the independent learner. Prior to the World Campus, the independent

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On the front line of on-line



Snapshots of three firms' on-line research experience

By Joseph Rydholm
QMRR editor

For some real-world examples of on-line research, I talked to researchers at three companies about some of their recent on-line projects. Two of the companies, Bay Networks and Informix, serve the computer industry. The other, Nickelodeon, provides a range of TV programming through its Nickelodeon and TV Land networks.

Bay Networks and Informix are users of SurveyBuilder.com, a service offered by Virtual Architects, Sausalito, Calif., in which respondents are recruited to visit the SurveyBuilder.com Web site to participate in surveys.

Menlo Park, Calif.-based database technology firm Informix turned to research to obtain benchmark data for its Web site, including information on where visitors went in the site, what they liked/disliked, what information they wanted. "Prior to the research, we had no benchmarks about what people thought of our site," says Sandra Bateman, director of corporate Web marketing, Informix Software. "Because the Web is new — I always say that WWW stands for wild, wild west — there is a lot of maverick behavior, a lot of claims are being made, so trying to get actual user data is important. We're spending all this time and money making these Web sites, but are people using them? You can measure the number of hits, but that doesn't tell you why people are coming to your site."

In Informix's case, a script was written so that every fourth person who visited the Informix site would be asked if they wanted to take the survey. Those who said yes were taken directly to the SurveyBuilder Web site. As an incentive, SurveyBuilder.com lets respondents select a charity to which to donate \$2. "It's a win-win," Bateman says. "We get the information and the charities benefit."

The survey was kept brief so that respondents could complete it in 10-15 minutes. "I like the fact there is a lot of flexibility in designing the questionnaires," Bateman says. "We have full control over the kinds of questions

and the number of questions. The people at SurveyBuilder.com have good advice about length and usability and how to attract people to take the survey."

Bateman says the information from the initial survey will serve as a benchmark for a new site that's under development. Once that site is up, more research will follow. "I think it's a very cost-effective way to go. Focus groups are a very handy tool, but they take time and money to set up. This kind of research is very quick and easy. You can get a good amount of data in a short time. The limitation is that you're going after a selective audience, so there's no way for me to find people who aren't

"We're spending all this time and money making these Web sites, but are people using them? You can measure the number of hits, but that doesn't tell you why people are coming to your site."

— Sandra Bateman, Informix Software

going to the site and find out why. That's where a focus group would be helpful. But for our intents and purposes it's a good tool and we plan to use it on a regular basis."

Bay Networks, a Santa Clara, Calif.-based hardware networking company, has also used SurveyBuilder.com to research visitors to its Web site, www.baynetworks.com. Network managers, corporate management and others use the site to get product infor-

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The top 10 FAQs about on-line research

By Bill MacElroy

Editor's note: Bill MacElroy is president of Socratic Technologies, Inc., a San Francisco research firm. He can be reached at 415-648-2802.

The following questions are the ones that I hear most frequently from people considering using the World Wide Web and/or the Internet for conducting marketing research.

Q1: *Are the results that you get using on-line research techniques projectable?*

A: The question of projectability always needs to be examined in the context of the research being done. Statistical projectability says that if you take a random sample of sufficient size within a known population (e.g., that everyone in the population has an equal chance of participating), then the results are indicative of what you would get if you

polled the entire population, give or take some level of error. The real trick here is to answer the question "What population are you polling?" If you are attempting to determine the opinions of on-line users of a particular site, or users who register products on-line, and you randomly recruit them to participate, then yes, your results will be projectable to that population. If you are attempting to determine reaction to a new concept for a salty snack, however, using on-line research probably won't map to the total population of consumers of snack products. The universe of on-line users (both business-to-business and consumer) has grown to the point where it should be considered a sub-group of such importance that it is worthy of study in and of itself – without the questionable practice of attempting to project these

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findings back to the more general, off-line population.

Q2: How do you recruit people for these surveys?

A: Recruitment for on-line studies is done in one of several "ethical" ways. The best results for recruitment are achieved by contacting people who are "known" participants in your own on-line activity. These can be product registrants, people who have signed up for your on-line service, guest registrants on your Web site, etc. It is usually recommended that you include the request to contact registrants for possible follow-up research as a part of any on-line registration process.

There are several nationally known on-line databases (Socratic Forum, Greenfield Online, Cyber Dialogue, etc.) which can be sources of potential respondents. These databases consist of people who have volunteered to take part in on-line marketing research projects and who have been screened for on-line activities, as well as demographic, firmographic, and technographic characteristics. Unlike some traditional panels, these databases are usually not over-pollled. Incentives are set for each survey based on historical response rates for similar topics and questionnaire length.

Once the source of potential respondents has been identified, several methods of recruitment may be successful. For extremely sensitive or complex surveys, some studies are pre-recruited by phone. This can be somewhat expensive and cumbersome, particularly if passwords are required. Also, some respondents have difficulty in writing down complex Internet addresses (URLs such as www.survey.com/bin/auto_test~1), so it's best to keep them as simple as possible.

The best way we have found, however, is to use an e-mail invitation that has some very specific components. In order to be successful, the e-mail invitation should include:

1. A subject line that indicates the topic (e.g., "Survey Invitation for on-line Travel Purchasers")

2. Where the e-mail address was found (e.g., "As a recent registrant at

our Web site...")

3. Who is conducting the research (e.g., "XYZ Company has been commissioned by [Client Name optional] to perform this research). If the study must be blind to avoid biasing the answers, we often offer to reveal the name of the client at the end of the survey, or by follow-up e-mail if so requested. Note: If what you are testing is so confidential that the client can never be revealed, you may want to reconsider using the Web as the delivery mode.

4. A brief description of the topic (e.g., "We are interested in the opinions of those who have booked hotel reservations using an on-line travel

*The best results
for recruitment
are achieved by
contacting
people who are
"known"
participants in
your own on-
line activity.*

service...")

5. The approximate time required (e.g., "This survey should take no more than eight minutes of your time...")

6. A description of the incentive. Note: Very few people do anything on-line without some type of compensation or honorarium! (e.g., "The first 100 people to complete this survey will receive...")

7. The survey address. Note: Most modern browsers will automatically detect a valid Web address and turn it into a hot link – allowing people to immediately go to the survey site.

8. Valid contact information (e.g.,

"If you have any questions about this survey, or if you experience any technical difficulties, please contact the Project Director Brian Smith at 800-555-1234 or e-mail him at brian.smith@researchco.com)

Q3: *What is the difference between an e-mail recruitment and all the junk mail (spam) that people get?*

A: One way to recruit people for on-line studies which appears easy but is considered extremely offensive, is to send out mass e-mails to all sorts of people with no regard to the relationship they may have with the sponsor of the research. Not only is this considered very poor "netiquette," it also doesn't work! In an academic study run in 1995, controlled tests of response rates between paper and pencil and unsolicited, general e-mail surveys showed that even paper and pencil had a higher rate of return than spam e-mail surveys. In addition, the number of hate-mail responses was five times the number normally seen in other forms of research. Furthermore, the quality of data from the completed unsolicited e-mail surveys was terrible – many more missing answers, obvious sabotage, and a high number of unrealistic outliers demonstrate that SPAM DOESN'T PAY!

Q4: *What are "cookies?" Are these ethical? Can't people get around these?*

Cookies have been the source of a great deal of concern and alarm in the press. In simple terms, a cookie is an incredibly small bit of information that is stored in a user's browser. These files do not "escape" from the browser and can't affect the computer itself. Cookies are used to store information about what you have done on a Web site. Any sites that need to "recognize" you without a password (such as a customized news reader, MyYahoo!, or other personalized sites) do so by storing the key to your profile as a cookie. Cookies can be used in research to determine where a respondent has left off in a survey if they wish to pick it back up later. Cookies can also be used in conjunction with unique URL addresses and other technologies to help enforce quota controls and multiple-survey

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Although most new browsers allow users to either turn off the ability to write a cookie, or alert the user when a cookie is being written, most people who take advantage of these options lose a tremendous amount of Web functionality, or are prompted to accept or reject a cookie constantly. Most people quickly decide that the cookie writing functionality is worth any intrusive aspects.

The only thing that could prove unethical with regard to the use of

cookies has to do with spam. Some new technologies can read what sites you have visited and add you to a contact list that usually involves an unsolicited e-mail. Another, less intrusive technique involves using this same technology to create customized banner ads for your "surfing profile." For example, if you visit a lot of travel sites, you might begin to see more banner ads for travel specials and on-line agencies.

Q5: *How can you make sure that the person you invite is the one taking*

the interview?

A: Interestingly enough, there are more technologies to make sure that you are dealing with the correct on-line respondent than in many traditional techniques such as paper and pencil. One of the best ways is to generate a unique Internet address for each invitee. This can be done by using a random generator to tack on a short address to the main survey URL. If, for example, we generate the random string "xt)5~P," we can append this to the URL address in the individual invitation to participate (either through the mail or using e-mail). The resulting address, [www.survey.smart.com/sbs/exqm.xt\)5~P](http://www.survey.smart.com/sbs/exqm.xt)5~P), is unique to the recipient of the invitation. In conjunction with cookies and other technologies, this method allows respondents to click on the hot link and go to the survey site and either start the survey from the beginning or pick up where he or she left off. As the respondent attempts to enter the survey, the predetermined address code is compared to a database. If the survey code is valid and has not been submitted previously, the survey admits the respondent. This system allows the respondent to complete one survey from any number of machines (either at home or work), unlike systems that rely solely on cookies for screening purposes.

More recent developments from major browser producers allow for electronic signatures from individuals who have entered a password for access to the Internet. In the future, these "signed" documents will help certify who has submitted a completed survey.

Q6: *What kinds of security issues do you have to worry about when conducting on-line interviews?*

A: Actually, very few security problems have ever been documented that didn't involve people voluntarily giving credit card numbers or other sensitive information to unscrupulous operators. Most security issues that have been raised with regard to survey technology have to do with electronic eavesdropping or "data clipping." Clipping can occur when all the data from a survey is transmitted at once as

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a block of information (such as when you complete an entire registration form and press "submit" at the end). Although EXTREMELY rare, someone with the right equipment could technically capture the data from your respondent's completed survey, and if they knew the site address, could reconstruct the answers to the questions. Obviously, this is a lot of trouble to go through for the answer to one questionnaire.

In the newer, more interactive forms of Web surveying, the data is

More recent developments from major browser producers allow for electronic signatures from individuals who have entered a password for access to the Internet.

submitted as smaller blocks (particularly whenever the database needs to test a set of answers for skipping instructions, randomization, or other logical functions). Because the Internet sends each batch of information through an infinite number of routes, it is now almost impossible to get anything more than one or two disassociated answers. In addition, because the survey itself is interactive, it is almost impossible to figure out which questions go with the answer data you've clipped. Bottom

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line: Interactive surveys on the Internet are MUCH more secure than telephone or paper and pencil methods.

Q7: What are the various options for conducting on-line research and

when do you use one versus another?

A: At this time there are six types of on-line surveying being done. These are:

- E-mail and bulletin board surveys: Usually best with internal audiences

(employee groups, distribution partners, beta testers, etc.). Advantages: Very fast. Very cheap. Limits: Best with fewer than 12, close-ended questions. Not all e-mail/bulletin board readers support graphics. No skip patterns, error checking, randomization, or other logic-based control techniques are available.

- HTML form surveys: Use form-based data entry process and submit all survey answers upon completion of data entry. Advantages: fast, fairly inexpensive. Limits: best with shorter, more straightforward surveys. No skip patterns, error checking, randomization, or other logic-based control techniques.

- Fixed-format interactive surveys: provide interactive testing using a standard format for question construction. Most examples of this type of survey tool are stand-alone, PC-based software packages; some, however, can be designed and implemented on-line at a survey Web site. Advantages: fast; full use of skipping, piping, randomization, and other logic-based controls; less expensive than custom programming; built-in QA functions. Limits: less flexibility in formatting. Usually only one question per Web page or some other type of highly regulated question format.

- Custom interactive surveys: Advantages: provide all the benefits of fixed format interactive surveys with the added benefit of greater flexibility in Web page design and better presentation of graphic stimuli. Allow multiple question blocks. Limits: Much more expensive. Take longer to program and do QA.

- Downloadable surveys: Are programs that are designed to run on the respondent's computer, rather than on the host Web site. Advantages: larger number of fancier, Windows-based controls. More exotic testing is available (e.g., complex trade-off exercises, sophisticated allocations, and so forth). Limits: expensive to program. Long download times for even short surveys (10+ minutes). Difficult to explain/obtain respondent compliance in returning data file.

- IRC/chat functions: Interactive chat, used in qualitative research for both on-line focus groups and one-on-



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one in-depth interviewing. Advantages: faster than real focus groups. No geographic barriers. Limits: somewhat chaotic – relies very heavily on the skill of moderator to provide control. Tyranny of the best typists may skew results. Less interaction between participants than in physical groups. Difficulty in getting specific individuals together at one time with all telecommunications functions working properly at all sites.

Q8: *Can I run these surveys on my own equipment/server?*

A: Right now, several of these scenarios can be hosted by the client's

Interactive surveys on the Internet are MUCH more secure than telephone or paper and pencil methods.

own server. Once the researcher has created an e-mail or HTML form-based survey, these can be put up on the client's internal server. Other more sophisticated forms of Web-based surveying (fixed format and custom interactive surveys) are currently being hosted only on the producers' sites.

Q9: *What kind of incentives do you find effective for on-line studies?*

A: Many different types of incentives are being offered to potential respondents in an attempt to increase participation rates. These fall into several different categories. The most effective incentives (from a historical perspective) have been drawings for cash prizes of \$500 or more, or for computer or office peripherals (e.g.,

printers, PDAs, telephones, etc.) For very hard-to-reach respondents, individual incentives of airline bonus miles or cash awards of up to \$50 have proved extremely effective. However, individual cash incentives of \$100 have proved no more effective than \$50 cash premiums in attracting difficult-to-reach respondents.

Occasionally, someone asks about states that don't allow "lottery-based" incentives. What we have determined so far is that Web-based surveys are somewhat different than other forms of surveying in that all transactions take place at the site where the survey is hosted (the individual survey-takers are only connecting to the Internet at their site – not doing the survey). So far, if the server is in a state that allows these types of incentives, then they are permissible. Even though laws limit the use of the telephone to solicit or offer lotteries or other illegal forms of gambling in some states, the Internet has been determined to be different and distinct from this interpretation of "telephonic technology."

At this point it looks doubtful if the individual state governments will be able to successfully regulate this type of e-commerce. Be careful, though, if you plan to pre-recruit respondents by telephone or to download surveys that run on the respondent's PC – these are probably covered under the existing laws. Also remember that the Internet rules are "in play" and may change at any time.

Q10: *How long does it take to get an on-line survey done from start to finish?*

A: This, of course, varies according to the length of survey and methodology used, but here are some average times from final questionnaire to quantitative topline data:

E-mail: three hours to three days

HTML form: three days to 10 days

Fixed format interactive: three days to 10 days

Custom interactive: seven days to 14 days (includes three days of custom programming/QA)

Downloadable: seven days to 20 days (includes three days of custom programming/QA). □

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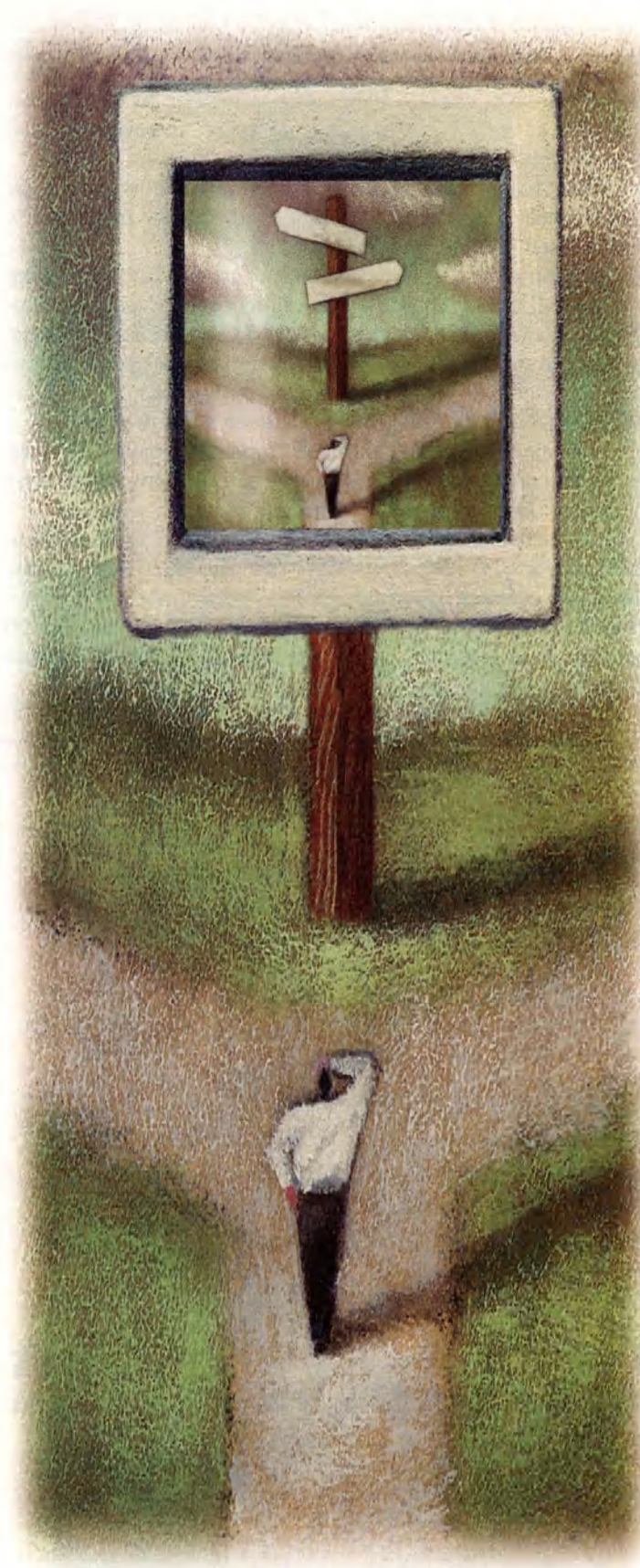
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Conducting full-profile conjoint analysis over the Internet

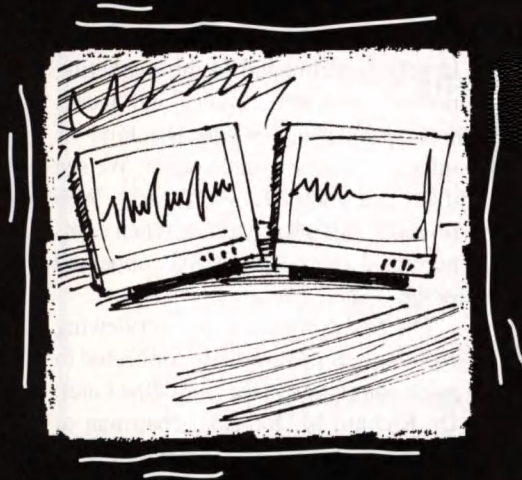
By Bryan K. Orme and
W. Christopher King

Editor's note: Bryan Orme is a customer support consultant, and Chris King is president, of Sawtooth Software, Inc., a Sequim, Wash., developer of PC-based computerized interviewing and conjoint analysis tools. They can be reached at 360-681-2300 or at info@sawtoothsoftware.com.

The advent of the World Wide Web (WWW) is changing the way we communicate in business. Over the past 20 years, a similar impact was felt with personal computers and software, overnight delivery services, fax machines, e-mail, and voice mail/answering machines. The WWW is building on the strengths of these advances.

The growth in Internet usage is truly astounding. According to IntelliQuest, Inc. of Austin, Texas, as of the first quarter 1998, 32 percent of the U.S. population age 16 and older (or 66.5 million individuals) is on-line. In the period of only a year (fourth quarter 1996 to fourth quarter 1997), the number of Internet users in the U.S. grew by 32 percent. And if projections hold, 38 percent of the U.S. population age 16 and older (or 78.4 million individuals) will be

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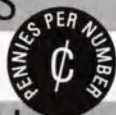
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As market researchers begin to use the Internet to conduct surveys, they shouldn't feel completely disoriented. Internet surveys share much in common with traditional computerized surveys. The trick is to leverage what we've already learned about computer interviewing and computerized conjoint surveys and apply it to this new and exiting medium.

This article is organized in two parts. First, we'll cover general WWW survey research issues, and then we'll report on an on-line full-profile conjoint survey conducted over the Web dealing with credit card preferences.

Computer interviewing: historical perspective

Until recently, the WWW had been largely experimental in the marketing research industry. Control and access were primitive, limiting the kind of information one could collect. We see many parallels between early Web research and what was felt when computerized interviewing first appeared in the '70s.

The first computerized interviewing was done using terminals connected to large computers in the mid '70s. Later, Dr. Richard M. Johnson, chairman of Sawtooth Software, pioneered PC-based interviewing in 1979 using Apple II computers. He found that he could customize each interview, not just with programmed skip patterns, but using adaptive heuristics to formulate efficient preference questions for collecting conjoint data. The computer would "learn" about a respondent's preferences and customize each interview to focus on the most important attributes. In 1985, Sawtooth Software released Ci2 (Computer Interviewing) and ACA (Adaptive Conjoint Analysis) for the IBM PC to the marketing research community.

Widespread use of disk-by-mail (DBM) was still many years in the future when PCs became commonplace in businesses and homes. Today we face similar issues and opportunities with the Internet. Fortunately, advances in software and the booming popularity of the Internet means that WWW interviewing is rapidly becoming practical and feasible as an addi-

tional tool for the market researcher.

Using the WWW to collect market research data consists of two modalities: surveys that are e-mailed, and on-line surveys.

E-mail surveys

The text-based e-mail survey is perhaps the easiest method for conducting marketing research surveys on the Web. Respondents type answers into pre-specified blanks with their e-mail editor or word processor, and return the completed form to the sender.

Text-based e-mail survey pros:

- Low cost: quick and easy to put together.

Text-based e-mail survey cons:

- Lots of data cleaning.
- Respondents may delete part of the survey with their word processor.
- Questionnaires are not very attractive: no graphics, font control or colors.
- Respondent sees all questions at once: no automatic skip patterns.

The second form of e-mail survey involves a program executable (usually in a zipped file) which respondents install on their computers. The data file is e-mailed back to the sender.

E-mailed survey executable pros:

- Control of skip patterns and data entry verification.
- Attractive surveys, including graphics, font control and colors.

E-mailed survey executable cons:

- Many users fear installing software e-mailed to them.
- Installation can be time-consuming: best for computer-literate respondents.
- Software compatibility across different computers — on some computers it may not work at all.

On-line surveys

The other form of Web-based survey is the on-line survey: respondents connect directly to the Web site which displays the questionnaire. On-line surveys can be formatted as a single form (page). The respondent scrolls down the page from question to ques-

tion, then clicks the submit button to send the information to a server.

Single-form on-line survey pros:

- Only a single download required at connection and a single upload when the form is completed.
- Relatively inexpensive to program and administer.
- Attractive surveys, including graphics, font control and colors.

Single-form on-line survey cons:

- No automatic skip logic.
- Data verification only possible at

*Until recently,
the WWW had
been largely
experimental in
the marketing
research
industry.
Control and
access were
primitive,
limiting the
kind of
information one
could collect.*

end of survey.

- Long forms can seem overwhelming and may not be completed.
- Long download time if survey is long, includes complex graphics, and/or your connection is slow.
- An entire interview might be lost if the computer, modem or net connection fails.
- Respondents cannot complete part of the form, terminate, and restart at a later time without losing all their



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work.

The second type of on-line WWW survey is the multi-form survey. Questions are presented on different pages (forms), and the data are saved when the respondent clicks the submit button at the bottom of each page.

Multi-page on-line survey pros:

- Permits skip logic and question-specific data verification.
- User doesn't face entire task at once.
- Attractive surveys, including graphics, font control and colors.

Multi-page on-line survey cons:

- Complex to program without the aid of WWW survey software.
- Delay between pages if you have a slow connection or your server has limited bandwidth.

Using passwords to control access to your Web survey

It is usually critical with Web-based surveys to limit access to your survey. Assigning passwords prevents unauthorized access to your survey and "ballot stuffing." Benefits also include control over quota cells and restarting of incomplete interviews.

Software compatibility and availability

Incompatibility among browsers and servers remains a major software issue. With the introduction of the Java programming language and Visual Basic (VB) scripting, additional functionality can be added to on-line surveys that far exceeds the restrictions of HTML. Unfortunately, Java standards are still elusive and VB is not supported by all browsers. Very little is common on the server side, and some software must be customized for each server configuration.

But, all is not hopeless. New PC-based software makes it possible to construct, administer, and host your own survey on either your own Web server, your ISP's (Information Service Provider) server, or the server belonging to the manufacturer of the survey software. The advantage of hosting your own site or using an ISP is that you have control over the study. You also avoid the per-interview costs

that are frequently associated with hosting on someone else's marketing research site. It also means that you can easily test your questionnaire, add questions while a study is in progress, and monitor its progress on-line.

Is the Web appropriate for your research?

Much has been said about the representativeness of data collected over the Internet. We trust you have studied the arguments to determine that the Internet is the right vehicle for your research study. We won't spend time

Even though computerized FP probably offers no significant benefit over paper-based surveys in terms of reliability or validity, real benefits might be realized in survey development and data collection costs.

addressing these arguments, but will proceed under the assumption that the Internet is appropriate for your research study.

We'll now focus our attention on conducting full-profile conjoint analysis on the Internet.

Conjoint analysis usage

In a 1997 survey of conjoint analy-

sis usage in the marketing research industry, ACA (Adaptive Conjoint Analysis) was found to be the most widely used conjoint methodology in both the U.S. and Europe (Vriens, Huber and Wittink, 1997). Traditional full-profile (FP) conjoint was also reported as a popular method. In general, we believe traditional FP conjoint is an excellent approach when the number of attributes is around six or fewer, while ACA is generally preferred for larger problems.

Paper vs. computerized full-profile conjoint

FP conjoint analysis studies can be done either as paper-based or as computerized surveys (Internet surveys, disk-by-mail, or CAPI). Because they typically involve fixed designs and, unlike ACA, are not adaptive, computerized FP surveys really offer no real benefit over the paper-based approach in terms of the reliability or validity of the results. In fact, paper-based FP may work better than com-

puterized FP. With traditional paper-based card-sort, respondents can examine many cards at the same time, comparing and manipulating them into piles. This helps respondents learn the range of possibilities and settle on a reliable response strategy. With computerized approaches, respondents see only one isolated question at a time. It may take a few questions for respondents to learn about the range of possibilities and settle on a reliable response strategy.

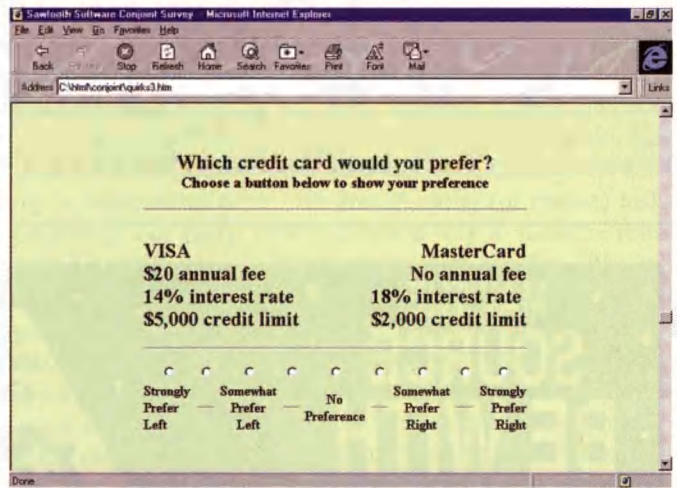
It is probably beneficial with computerized FP, therefore, to show the best and worst profiles early on in the survey.

Even though computerized FP probably offers no significant benefit over paper-

based surveys in terms of reliability or validity, real benefits might be realized in survey development and data collection costs.

Pairwise versus single-concept approach

Pairwise and single-concept presentation are two popular approaches for FP conjoint. A pairwise FP conjoint question administered over the Internet is shown below.



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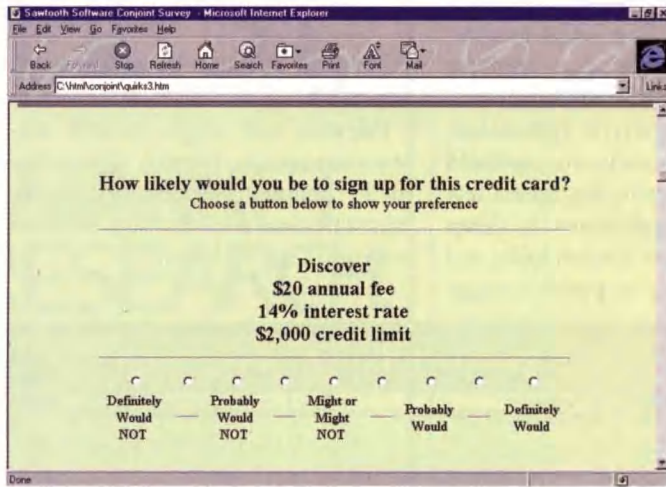
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The single-concept approach is represented below.

With pairwise questions, respondents make comparative judgements regarding the relative acceptability of

study other than this one that has directly compared these two approaches.



competing products. The single-concept approach probes the acceptability of a product, and de-emphasizes the competitive context. Both methods have proven to work well in practice, but we are unaware of any

Purchase likelihood ratings reflect the absolute desirability of product profiles. With pairwise ratings, we only gain relative information. This potentially can be a critical distinction, depending upon the aim of the research. Consider the person who takes a pairwise conjoint interview designed to find the optimal blend for tofu. The conjoint utilities might appear reasonable, even though he finds tofu disgusting and has absolutely no desire to ever buy it. If we use single-concept profiles, we can both derive utilities and learn about a respondent's overall interest in the category. Respondents who have no desire to purchase can be given less weight in simulations, or be thrown out of the data set entirely. The danger with single-concept ratings is that if a person gives most of the profiles the lowest (or highest) rating, there is limited variation in the dependent variable, and we may not be able to estimate very stable utilities.

One need not give up the benefit of measuring purchase likelihood when using the pairwise approach. Both pairwise and single-concept conjoint questions can be included in the same survey. Single-concept purchase likelihood questions could be used to calibrate (scale) pairwise utilities (as is done in ACA). We can get the benefit of the comparative emphasis of pairwise questions while including

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information on purchase intent.

An experiment

We designed an Internet survey to compare the pairwise and single-concept approach for computerized FP conjoint analysis.

The subject for our study was credit cards, with the following attribute levels:

Brand	Annual Fee	Interest Rate	Credit Limit
VISA	No annual fee	10%	\$5,000
Mastercard	\$20	14%	\$2,000
Discover	\$40	18%	\$1,000

Respondents completed both pairwise and single-concept conjoint questions (in rotated order). Enough conjoint questions (nine) were included to estimate utilities (12 part-worths) for both the pairwise and single-concept designs at the individual level. These designs had only one degree of freedom. In general, we would not recommend conjoint designs with so few observations rel-

ative to estimated parameters. For the purposes of our methodological study (respondents were required to complete both designs in the same interview) these saturated designs seemed satisfactory. Additionally, holdout choice sets were administered both before and after the traditional conjoint questions.

A total of 280 respondents completed the survey. Respondents self-selected themselves for the survey, which was launched from a hyperlink on Sawtooth Software's home page. This sampling strategy is admittedly poor had we been interested in collecting a representative sample. But the purpose of our study was not to achieve outwardly projectable results, but rather to compare the within-respondent reliability of alternative approaches to asking FP computerized conjoint.

We took three steps to help ensure the quality of our data: 1) we

required respondents to give their name and telephone number for follow-up verification; 2) we included repeated holdout choice tasks for measuring reliability and flagging "suspect" respondents; and 3) we examined the data for obvious patterned responses.

Measuring the reliability of conjoint methods

Reliability and validity are two terms often used to characterize response scales or measurement methods. Reliability refers to getting a consistent result in repeated trials. Validity refers to achieving an accurate prediction. Our study focuses only on issues of reliability.

Holdout conjoint (or choice) tasks are a common way to measure reliability in conjoint studies. We call them holdout tasks because we don't use them for estimating utilities. We use holdouts to check how well conjoint utilities can predict answers to observations not used in utility estimation. If we ask some of the holdout

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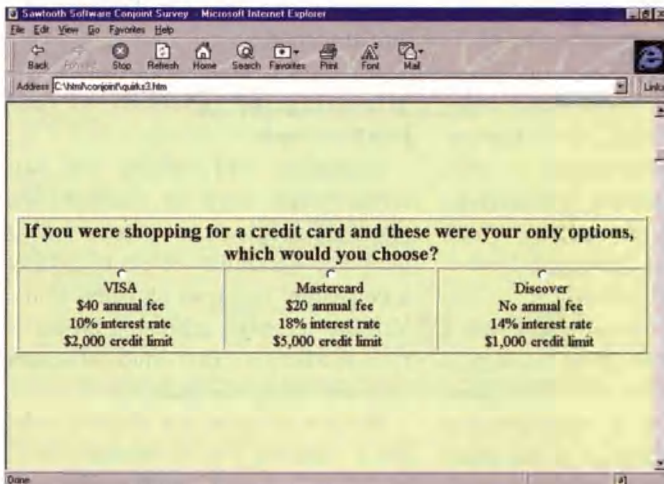
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tasks twice (at different points in the interview), we also gain a measure test-retest reliability.

We included a total of three different holdout choice questions in our Internet survey, which looked like:



These questions came at the beginning of the interview, and then the same ones (after rotating the product concepts within set) were repeated at the end of the survey. Respondents on average answered these holdouts the same way 83.0 percent of the time. This test-retest reliability is in line with those reported for other methodological studies we've seen that were not collected over the Internet. But one can argue that our respondents (marketing and market research professionals) were a well-educated and careful group. We cannot conclude from our study that Internet

interviewing is as reliable as other methods of data collection.

We use the holdout choice tasks to test the reliability of our conjoint utilities. We would hope that the conjoint utilities can accurately predict answers

to the holdout questions. We call the percent of correct predictions the holdout hit rate. Some have referred to hit rates as a validity measurement, but prediction of holdout concepts asked in the same conjoint interview probably say more about reliability than validity.

Comparing different conjoint methods using holdouts will usually favor the conjoint method that most resembles the holdouts. The comparative nature of the pairwise approach seems to more closely resemble the choice tasks (showing three concepts at a time) than does single-concept presentation.

Holdout predictions are not the only way to measure reliability. We can also examine whether part-worth utilities conform to a priori expectations. Three of the attributes (annual fee, interest

rate, and credit limit) were ordered attributes (i.e., low interest rates are preferred to high interest rates). When part-worth utilities violate known relationships, we refer to these as reversals.

Reliability of pairwise versus single-concept approach

The holdout hit rates for the pairwise and single-concept approach were 79.3 percent and 79.7 percent, respectively. This is a virtual tie; the difference is not statistically significant. These findings suggest that both methods perform equally well in predicting holdout choice sets.

The average number of reversals per respondent was 1.5 and 1.3 for pairwise and single-concept designs, respectively. The difference was significant at the 90 percent confidence level. These findings suggest that utilities from pairs questions may contain a bit more noise than singles. The difference was small, however, and we caution drawing general conclusions without more corroborating evidence.

Qualitative evidence

In addition to completing conjoint tasks, we asked for qualitative evaluations of the pairwise versus the single-concept approach. Respondents perceived that the pairwise questions took only 13 percent longer than the singles. We asked a battery of questions such as whether respondents felt the conjoint questions were enjoyable, easy, frustrating, or whether the questions asked about too many features at once. We found no significant differences between any of the qualitative dimensions for pairwise vs. single-concept presentation.

Conjoint importances and utilities

We calculated attribute importances in the standard way, by percentaging the differences between the best and worst levels for each attribute. Conjoint importances describe how much impact each attribute has on the purchase decision, given the range of levels we specified for the attributes.

We constrained the utilities to conform to a priori order for annual fee, interest rate and credit limit. Further, we scaled the conjoint utilities (at the individual level) so that the worst level was equal to zero, and the sum of the utility points across all attributes was

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equal to 400 (the number of attributes times 100). Importances were computed at the individual-level, then aggregated.

Importances and utilities for pairs vs. single-concept presentation were as follows:

Conjoint Importances

	<i>Pairs</i>	<i>Single-Concept</i>
Brand	18%	19%
Annual fee	37%	37%
Interest rate	21%	20%
Credit limit	24%	24%

Conjoint Utilities

	<i>Pairs</i>	<i>Single-Concept</i>
VISA	36	38
Mastercard	27	31
Discover	13	12
No annual fee	104	104
\$20 annual fee*	44	34
\$40 annual fee	0	0
10% interest rate	55	55
14% interest rate	30	30
18% interest rate	0	0
\$5,000 credit limit	64	67
\$2,000 credit limit	27	29
\$1,000 credit limit	0	0

*statistically significant difference at 99% confidence level

The only significant difference for either conjoint importances or utilities between the two full-profile methods occurred in the utility for the middle level of annual fee (\$20). In a presentation at our 1997 Sawtooth Software Conference, Joel Huber of Duke University argued that respondents may adopt different response strategies for sets of products versus single-concept presentation. He argued that when faced with comparisons, respondents may simplify the task by avoiding products with particularly bad levels of attributes. Annual fee was the most important attribute. The larger gap between the worst and middle level (44-0) for pairs versus single-concept (34-0) is statistically significant at the 99 percent confidence level ($t=3.93$) and supports Huber's "undesirable levels avoidance" hypothesis.

Pairwise versus single-concept FP conjoint: conclusions and suggestions

Our data tell a comforting story,

suggesting that both computerized pairwise and single-concept FP ratings-based conjoint are equally reliable and result in the same importances and roughly the same utilities. Computerized FP conjoint seems to have worked well for a small design such as our credit card study. Given that the researcher has determined that the Internet is an appropriate vehicle for interviewing a given population, our findings suggest that FP conjoint can be successfully implemented via the Internet for a small study including four attributes. □

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Internet surveys: a description of the demographics

By Daniel C. Lockhart and Fred R. J. Detwiler

Editor's note: Dan Lockhart, Ph.D., is director of marketing sciences, and Fred Detwiler, Ph.D., is a research analyst, at Maritz Marketing Research Inc., St. Louis.

The Internet is growing both in its number of users and as a medium for commerce and advertising. CyberAtlas¹, an on-line statistical reference resource for Internet marketing, reports that there are a total of 40-45 million adults in the U.S. using the Internet and 25 million total weekly Web users. They further report that some companies are netting on-line sales totals of up to \$2 million per day, and they estimate second quarter Internet advertising revenue at \$133 million.

This article discusses the following information regarding the demographics of individuals on the Internet:

- number of people on the Internet;
- current picture of Internet sales and advertising;
- information on companies who are conducting research on or about the

Internet;

- gender, age, and income biases associated with the Internet;
- interpretation of the meaning of results comparing Internet and telephone surveys.

Market size

Estimates of the number of people on the Internet vary depending on which of the following qualifications one uses:

- daily use of the Internet;
- having an e-mail account;
- connections in the last three months;
- ever looked at a computer screen connected to the Internet.

In addition, various groups have reasons to overstate or understate the actual market size of the Internet audience. While CyberAtlas reports that there are 25 million total weekly Web users and more than 31 million computers regularly connected to the Internet, forecasts from FIND/SVP², a provider of worldwide research and business intelligence services, indicate that by year's

end there will be:

- 75 million adult users in the U.S.;
- 28 million children;
- 28 million Internet-using households.

Peter Krasilovsky³ reported in early 1996, "Twenty percent of the American workforce and 5 percent of U.S. households say they currently have access to the Web...For the most part, these users represent the small (10 percent) but influential, highly-educated, high income, 'early adopter' segment of the population."

Sales

*USA Today*⁴ reports that salaries for a "vice president, on-line" are in the six figures. Their findings also indicate that Internet sales generate profits for 15 of the 104 large companies it surveyed. Web Commerce⁵ reports that The Yankee Group indicates that business-to-business electronic commerce will exceed \$135 billion by the year 2000. They further indicate that manufacturers of computer and airplane parts, such as Cisco and Boeing, lead

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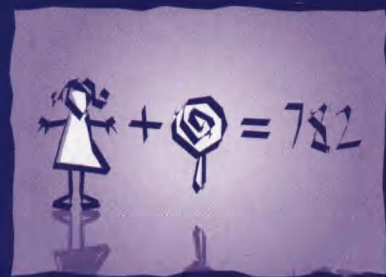
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the pack in business-to-business Web commerce this year, with \$3 billion in sales, or 38 percent of Internet business trade⁶.

Dell Computer's "Internet-Direct" reports that its Net-based sales are growing at a rate of 20 percent per month and generating revenues of more than \$1 million a day. Dell reportedly has corporate customers purchasing \$30,000 high-end servers on-line, and one large Fortune 500 company estimates its annual savings to be \$2 million through its Dell-developed Web site. Cox News Service⁷ reports that sales of music-related merchandise over the Internet now accounts for approximately \$23 million yearly.

Advertising

According to CyberAtlas, second-quarter Internet ad revenues totaled \$133 million — a 58 percent increase over the first quarter's \$84 million and a 250 percent increase over the same time period in 1996. Some heavy-hitting on-line advertisers include Microsoft, *TV Guide*, and *Wired* magazine.

However, CNET⁸, a digital technology information source, reports that the companies behind major consumer brands are still reluctant to advertise on

evidence comparing various methods of advertising before committing. CNET also reports that computer and Internet related companies spent 54 percent of their advertising budget for on-line advertising. Current Internet ad leaders include Netscape Communications, Yahoo!, Infoseek, and Excite.

CNET shows that automotive companies make up 5 percent of Internet advertising presence, with other consumer companies comprising 15 percent of on-line ads. Jupiter Communications expects on-line advertising spending to exceed \$5 billion by the year 2000.

Internet surveys and research

Several Internet sites are reporting on the on-line surveys they have conducted. Some of these are:

- Georgia Tech's historical Internet surveys;
- O'Reilly & Associates RDD telephone survey of Internet users;
- Netcraft's survey of Web servers;
- Find/SVP's American Internet User survey;
- Maritz AmeriPoll On-line;
- Nielsen's Internet demographics survey;
- sri VALS 2 Internet survey.

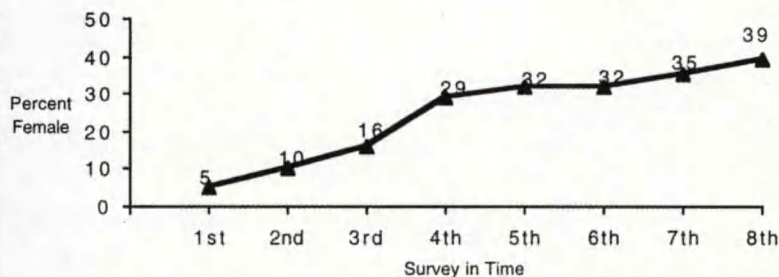
Table 1. Comparison by Sex

	U.S. Census	sri (1995)	O'Reilly (10/1/95)	Find SVP (1996-1997)	Georgia Tech (Apr-May 1997)	Maritz (Sept. 1997)
Male	49%	60%	67%	60%	65%	57%
Female	51%	40%	33%	40%	35%	43%

the Internet. While computer giants are swarming at advertising on the Internet, consumer products are holding back. Peter Storck of Jupiter Communications⁹ claims that the large consumer goods providers want solid

These surveys generally show that the Internet is gradually becoming more representative of the general American population. Some of the results of recent surveys are shown in Table 1.

Table 2. Gender Bias in Georgia Tech Surveys



Georgia Tech indicates that the average age has slowly but steadily been increasing, and the gender bias has been decreasing. Table 2 shows the decrease in gender bias as the percentage of female users steadily increases across the seven surveys conducted by Georgia Tech.

Age bias

Past studies have shown that Internet samples have an age bias, with samples

Table 3. Age Bias Comparison

	U.S. Census	Find/SVP	O'Reilly	Maritz On-line
Under 30	23%	23%	32%	23%
30-49	40%	60%	51%	46%
50 +	36%	17%	18%	31%

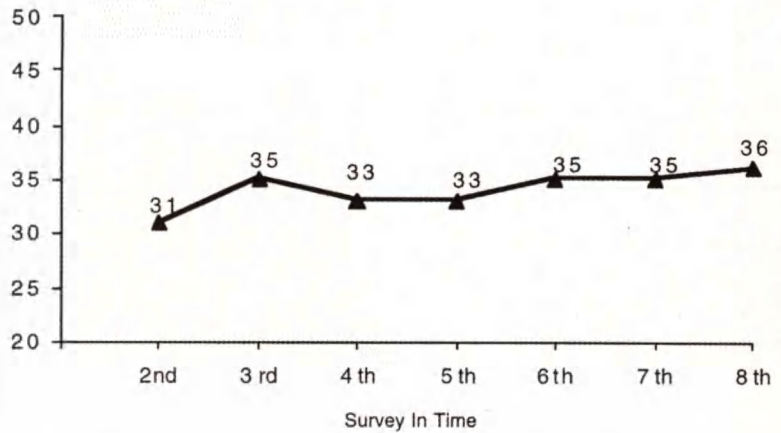
tending to overrepresent the middle-age categories and underrepresent the oldest age categories. Table 3 compares U.S. Census data to surveys by Find/SVP, O'Reilly & Associates, and Maritz AmeriPoll On-line. The Find/SVP and Maritz age categories were adjusted to match those of the other surveys.

Sri¹⁰ reports that there is a change in the age demographics of the Internet depending on the time of year when a survey is conducted. "We measured a

Table 4 shows the slight change in the average age of respondents to Georgia Tech's surveys.

Georgia Tech notes that the average

Table 4. Average Age on Georgia Tech Surveys



sharp decline in age after mid-August 1995, when the fall academic year started. As the domain data show, our sample contained a significantly larger proportion of new and returning university students from August through the start of October."

age has not changed much over time, but distribution has. The Internet population used to have a greater peak in the middle age bracket. Over time, a greater number of older and younger users are coming on-line, causing the age curve to become flatter.

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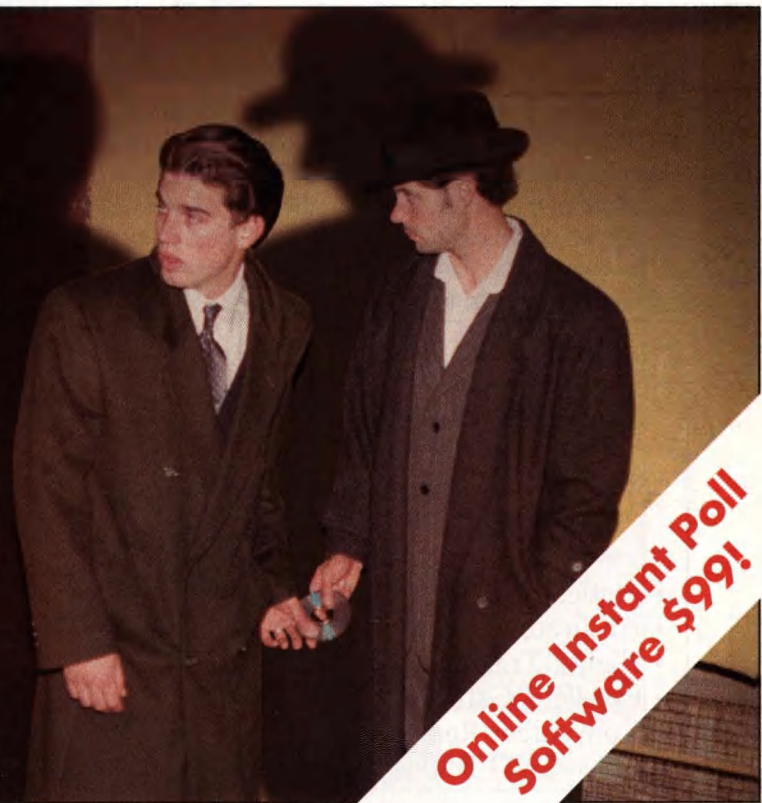
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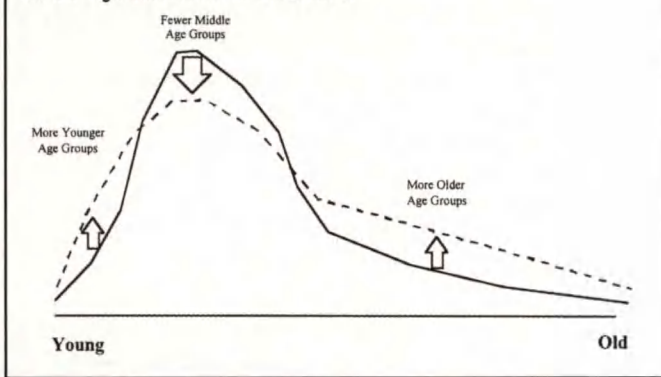
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Table 5. Age Distribution on the Internet



Income bias

The data in the chart from the Georgia Tech studies (below Table 6) indicates that individuals on the Internet are more likely to be in the wealthiest category than are individuals in the census.

However, data comparing previous surveys by Georgia Tech indicate that there has been a gradual decline in the average income of individuals surveyed in the Georgia Tech interviews (see Table 6).

Baseline knowledge regarding research on the Internet is rapidly increasing. Past surveys have suggested differences in samples obtained on the Internet versus samples obtained via other methods. However, there has been little attempt to validate the differences observed. At face value, it seems logical that individuals on the Internet are more likely to be younger males with more income than individuals not on the Internet. In addition, it seems to make sense that individuals on the Internet would be more likely to own (or have access to) a computer than individuals not on the Internet.

are biased, there is no definitive base-

line of comparison. Therefore, if someone obtains a different result than these sources, it is not clear which source is the most accurate. In addition, other factors may account for differences observed, such as:

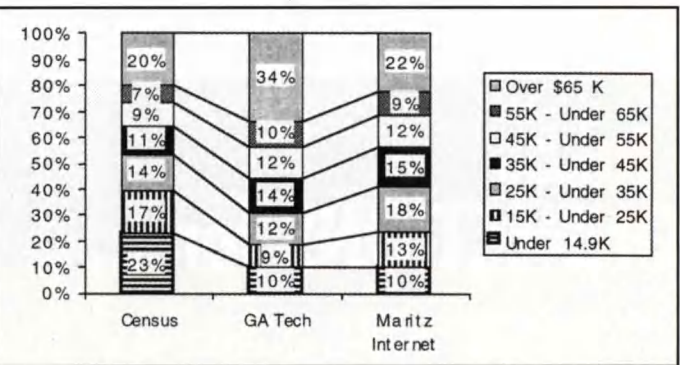
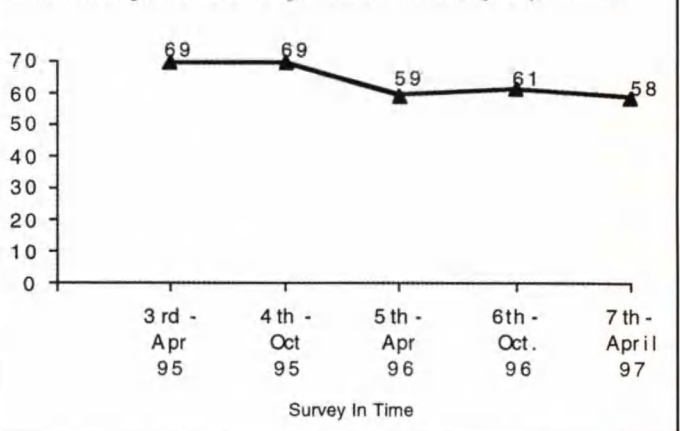
- dissimulation or lying;
- misunderstanding the questions;
- differences in the interpretation of questions.

But beyond this superficial validity, little is known with much precision. Georgia Tech has conducted a number of surveys and compared its results to those found by Find/SVP. However, if both surveys

Maritz is beginning to explore differences in survey results obtained via the Internet and those obtained via other methods. Currently, we have completed five parallel studies via both the Internet and telephone. Table 7 shows some basic information on these five studies.

Preliminary results of our analyses indicate that there are differences in the responses provided by individuals in an Internet survey and those provided by individuals in a telephone survey. Our data further indicate that these differences are not accounted for by differ-

Table 6. Average Income of Georgia Tech Internet Survey Respondents



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Table 7. Maritz AmeriPoll Survey Dates and Sample Sizes

Survey Topics	Telephone Dates	Internet Dates	Telephone Completes	Internet Completes
Car washing	4/15-17 ('97)	6/5 - 7/23 ('97)	1,003	963
Holiday shopping I	7/14-20 ('97)	8/12 - 22 ('97)	907	889
Billboards	8/25-27 ('97)	9/19 -29 ('97)	885	631
Holiday shopping II	11/3-5 ('97)	12/12 - 26 ('97)	1,006	1,076
Valentine's Day	2/2-4 ('98)	2/10-14 ('98)	941	1,030

Table 8. Summary of Adjusted Means Controlling for Demographic Variables

	Telephone	Internet	P <
^a Do not feel safe in the car (5 pt. scale: More means less safe)	2.6	2.7	.05
^a Find billboards entertaining? (5 pt. scale: More is more entertaining)	2.4	2.7	.001
^a Belief that billboards should be regulated (5 pt. scale: More is more agreement)	3.5	3.1	.001
^b Car washing frequency (number of times washed per year)	25	20	.001
^b Oil change frequency (number of miles between oil changes)	3,033	3,683	.001
^b How far ahead plan for holiday purchases? (days)	81	92	.001
^b How far ahead begin making holiday purchases? (days)	72	79	.05
^b Annoyance at pre-Halloween holiday sales (5 pt. scale: More is more annoyed)	2.9	3.7	.001
^a Demographics were age, gender, and income.			
^b Demographics were age and gender.			

ences in the demographics of respondents. That is, when one takes into account differences in gender, age, and sex, there are still discrepancies in responses not accounted for. Analysis of 18 variables from three of the Maritz studies (billboards, car washing, and holiday shopping I) reveals these telephone vs. Internet differences. Table 8 shows the eight variables on which the respondents differed.

It should be emphasized that these studies only examined telephone vs. Internet responses. The fact that some phone respondents are Internet users makes it likely that the differences found are smaller than would be expected if Internet users had been screened out of the telephone responses. The eight significant relationships out of 18 tests are higher than would be expected by chance alone. These data show that Internet responses are different in the following manner:

- They feel less safe in their cars.
- They find billboards more entertaining.
- They are less likely to believe that billboards should be regulated.
- They wash their cars less frequently.

quently.

- They change their oil less frequently.
- They plan further ahead for holiday shopping.
- They begin making their holiday purchases further ahead.
- They are more annoyed by pre-Halloween holiday sales.

Going beyond these results leads us to believe that individuals on the Internet are less conscientious about their cars, plan further ahead, are more entertained by advertisements, and are more interested in information and freedom of information flow. One may see an apparent contradiction between these individuals planning ahead yet being less conscientious about their cars. This could be accounted for by a belief by these individuals that washing one's car and changing the oil (slightly less often) does not have a significant impact on their automobiles. These individuals may be more concerned about self-improvement, knowledge, and civil liberties, and less concerned about their material possessions.

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A recent presentation by Roberta McConochie¹¹ at TECH '98 (sponsored by Golden Gate University, MRA, CASRO, Silicon Valley AMA, and the San Francisco Bay Area AMA) adds further insight into these results. She has found that individuals on the Internet are more likely to fit into one of three Arbitron segments: fast-laners, savvy sophisticates, or sports fanatics. She indicates that these three segments share the following characteristics:

- They prefer fast-paced entertain-

ment.

- They use technology to attain goals.
- They are achievement oriented.
- They are more involved in sports.
- They tend to have higher incomes.
- They are more likely to be college graduates.
- They are more entertained by fast-paced, intense, interactive entertainment.

These individuals appear to be information seekers who tend to be innova-

tors or early-adopters in their purchase behavior. Over time, more and more laggards will be getting on the Internet. We believe that because the Internet is a more private place for interviews and represents an environment that is more conducive to honest responses, social dissimulation will be less for Internet surveys than for telephone surveys.

The Internet represents a "brave new world" for professional marketing research organizations, where on-line surveying standards are just starting to be discussed. Currently, there is no definitive source identifying the population of individuals on the Internet. As this article has shown, the evidence indicates that the Internet has been very biased toward males with higher incomes in middle-to-younger age brackets. Over time, these biases seem to be lessening.

The Internet is already a vast medium for commerce and information exchange. Profitable companies are advertising and selling their goods on the Internet. New methods to legally and illegally make money are being made possible by the Internet. Our studies work toward helping to define how research should be conducted on the Internet, what differences one can expect when doing research on the Internet, and how research can be used to better understand the Internet. □

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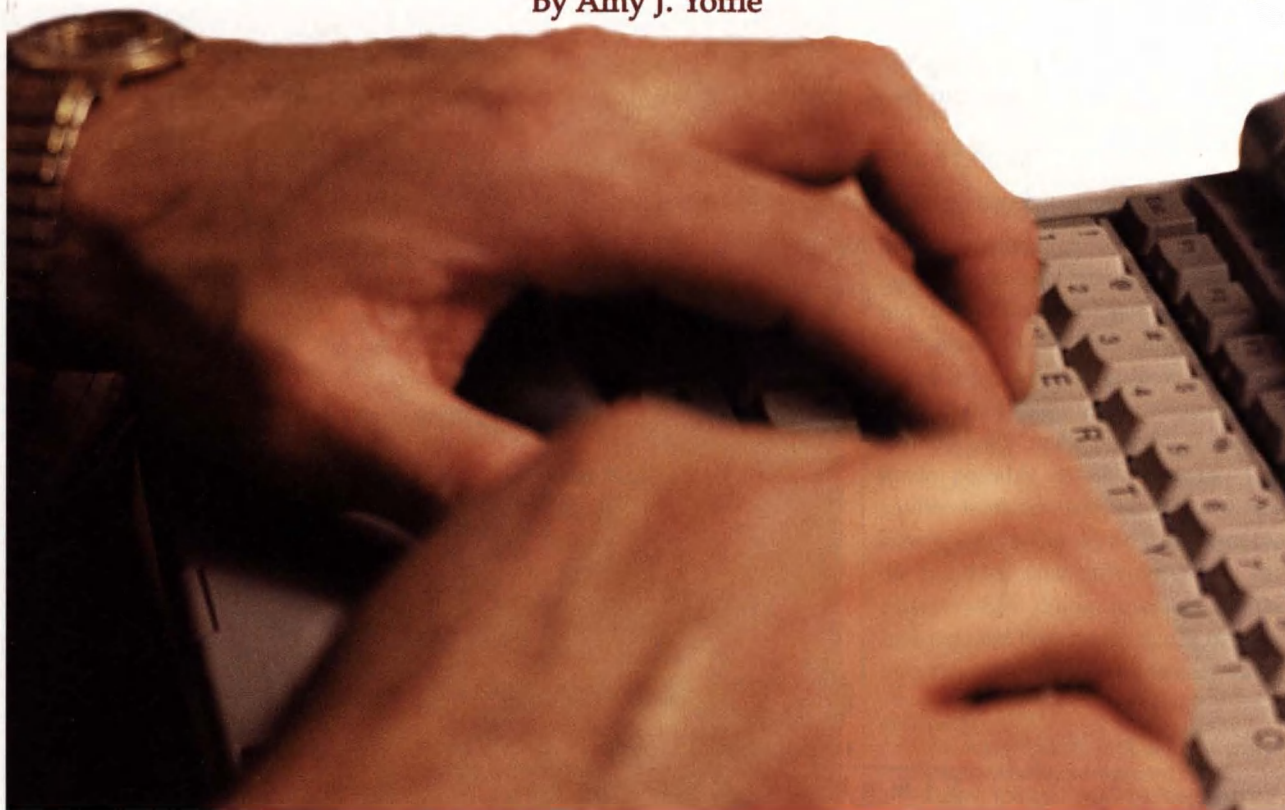
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On-line research: playing to the Web's strengths

By Amy J. Yoffie



Editor's note: Amy J. Yoffie is president of Research Connections, an on-line marketing research firm in Westfield, N.J. She can be reached at ayoffie@researchconnections.com.

Those who criticize and question the value of on-line marketing research may be missing an essential point. For some studies, Web-based research is, in fact, the better way to gather data. It has become a tool that enriches the researcher's efforts and provides a new way of learning what the customer wants. Thus, we need to consider the fact that rather than trying to replicate traditional research on the Web, on-line research can stand on its

own merits. And, it has the capability to provide us with information that is more revealing than what we can gather off-line.

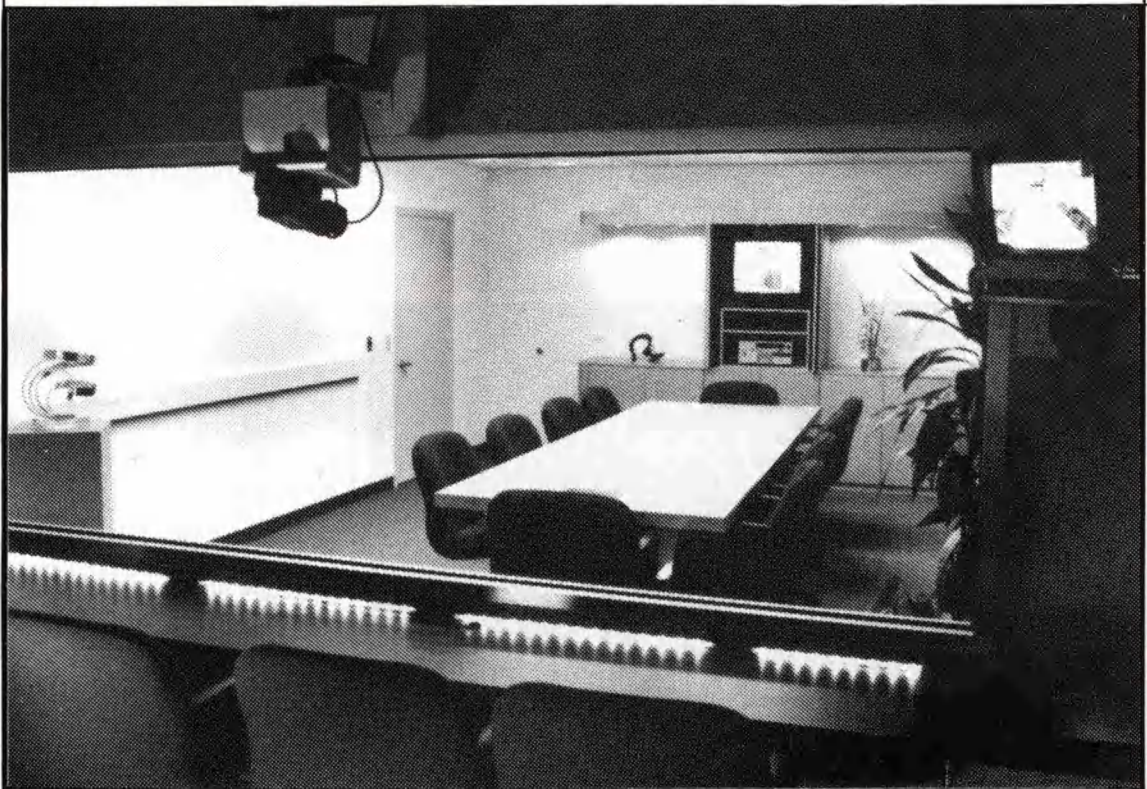
This perspective attracted a recent client, who was particularly interested in conducting on-line focus groups to learn about the relationship between its product and GenXers. I cannot reveal the company or its product, so let's say we were conducting the research for a company called Motor Madness, a manufacturer of motorcycles. Since GenXers are on-line in great numbers, the client thought the Web would be a particularly good place to meet and talk to them. Of course, to hedge its bets, the client also conducted traditional

groups.

Typically, when Motor Madness conducts qualitative research, it does so in order to understand the psychographics of its target market groups. For traditional groups it has accomplished this in a variety of ways, by:

- 1) obtaining lifestyles information via a screener;
- 2) asking each person to make a collage of items that are important to them to bring to the group; and
- 3) requesting that they bring objects with them that best represent their relationship to motorcycles. They also ask each participant to bring a buddy, the idea being that they will feel more comfortable revealing themselves if

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they have a friend in the group.

Three key items were clear to us about conducting this research on-line. First, we couldn't have people bring things to the group, so we needed to find other ways of self-expression. Second, the anonymity of the Web makes people feel more comfortable talking about themselves, so we did not need participants to bring a buddy. Third, the telephone screener used for in-person groups was too long to use during our recruit, which was conducted by e-mail. Respondents who were

between the ages of 20-30 were recruited from members of the Research Connections Internet Panel.

To handle the screener length problem, the e-mail invitation asked for basic demographics — age, gender, and employment/education status — as well as ownership of a motorcycle, and who paid for the motorcycle. There also were screens for past participation and security. Finally, because we needed them to take pictures, we screened them for ownership of or access to a 35mm camera.

Once we qualified people, we sent them a roll of film and the rest of the screener used for the in-person study. We also asked them to take photographs of their lifestyles and their motorcycle. And we asked them for the URLs (Web addresses) of their favorite Web site and five sites that reflected their relationship with their motorcycle. They were instructed to send the film to a company we had selected that would develop it as digital images.

As we received each person's photographs, we created for them and put on the Web a personal "photo album." Each participant's album (set of photos) was in a different location and they were given the URL to go to, so that they could view their pictures, select 10 to 12 of their favorites and write captions for them.

Completed the tasks

By the time we were ready to hold the groups, 35 out of 90 recruits had completed all of the tasks — filling out the screener, taking the photographs, selecting their favorite pictures and adding captions to them, and advising us of their favorite and motorcycle-related sites. We were impressed that so many people stuck with us.

As is typical of on-line groups, there was a 50 percent drop-off in the first two groups when it actually came time to participate; thus for the first two groups, we had six people. The last group had 11 people.

We met on-line at the Research Connections Virtual Focus Facility. This is a password-protected area, divided into "rooms" where we can hold on-line groups. Participants got there by typing the URL we provided, and by entering their user name and password when the site came on their screen. Each group had its own URL and unique user names and passwords to ensure that participants attended only the group to which they were assigned. The password security also prevented just anyone from wandering into the room.

The clients also were given user names and passwords so that they could attend and observe each group while it was in progress. They were instructed on how to communicate with us privately, in case they wanted to add

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questions or probe an unexpected response.

Each room has a split screen, so that instructions and visual items can be shown on the top half of the screen, while we "talk" on the bottom. Initially, participants saw a set of guidelines at the top of the screen, which were developed to enhance their experience. In particular, they were told that the moderator's comments would appear in capital letters, while theirs would be lowercased, to make it clear who was asking the questions.

They also learned how to send us a private message if they had questions during the group, so as not to impede the flow of the discussion. They were encouraged to use "emotions" in the discussion (e.g., laughs, grins, LOL [laughs out loud]), and we told them that "Spelling duzn't count" to encourage free expression. It turns out that we didn't have to be concerned on that score!

Lively and candid

The groups were lively, and the respondents quite candid. This was due, in part, to the anonymity of the participants. In addition to anonymous screen names, group members were able to open-up comfortably from the security of their own familiar surroundings. No one had to bring a buddy to feel at ease. In fact, we think that not having a buddy worked to our advantage because, by not knowing anyone else in the group, participants could speak their minds.

Participants could respond at any time, with comments as long as desired. In fact, they could all "talk" at once. In a traditional group, people have to wait to give their thoughts and, by the time they can do so, they often have forgotten what they want to say or their comments have become irrelevant. On-line participants can respond at any time and with comments of any length.

So how did the groups work? After a general conversation, we began to show, one at a time, the on-line photo albums of each participant, by "taking" everyone to see each album. RCI staff controlled whose album was displayed by typing in the unique URL for that album. Participants did not have to do

anything to access the album; it simply appeared to everyone on the top of the facility's split-screen. They typed their comments on the bottom half of the screen.

Even though only one person at a time could talk about his/her photos, others were brought into the conversation to reflect how someone else's lifestyle compared to their own. Common lifestyle topics included pets, computers, geography, road trips with their motorcycles, life as a student or worker, and concerns about their ability

to achieve the kind of financial success their parents had.

Since we wanted an understanding both of their relationship to motorcycles and how this generation perceives itself, we delved into the topic of what it's like being 20 to 30 years old: what is the best thing, what is most frustrating, and what is the greatest misperception about their generation.

Go where I want to go

For the most part, respondents valued freedom and independence above



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all else and resented things that took it away — like a lack of money and time. One participant defined independence as not having to tell people when he will be home or ask if he can go somewhere. Another said, "Freedom is going where I want to when I want to, minus traffic." Many wanted to clear up the misperception that Generation Xers are dumb and uncaring, which they believe is their image among older people.

Respondents also were asked to compare themselves to their baby boomer parents. Most believed that they probably have the same problems and worries their parents had when their parents were in this age group.

When asked about who and what influences their purchasing decisions, the participants cited their own experience and research (homework and word-of-mouth). While they may read advertising or talk to salespeople, they rarely believe what is said, unless there is some other source of confirmation.

When we reached the part of the discussion that focused on the Web sites they had chosen, again we were able to show each site at the top of the participants' screen, without their having to type anything to view it. We found that using a Web site as a means of self-expression proved to be very revealing.

For example, one participant cited a Web site which contained an image of the Rock of Gibraltar. She explained that this image was representative of her motorcycle because it was reliable and "solid, like a rock." Another participant pointed out a Web site that featured a wind surfer whooshing through the waves, describing her motorcycle as a "freedom/wind-through-your-hair kinda thing."

After sending the group to the USA Today Money Market Web site, a member said that since he owed so much money on his motorcycle he thought the site was an appropriate image. Yet another likened his motorcycle to yahoo.com (an on-line directory) because they both give him choices and make things available to him.

Diverse and personalized

Being able to go anywhere on the Web and having thousands of Web sites

from which to choose resulted in a diverse and highly personalized expression of participants' relationships to our client's product. Given the Web's reach, they had free reign to choose sites that "defined" them. The sites linked their values, lifestyles and perceptions of motorcycles to the motorcycle buying behavior of GenXers.

On-line focus groups enabled us to assemble for our client groups of people who were geographically dispersed. This resulted in a more diverse population than was possible in the traditional groups. In fact, there was an important difference between the two groups. The traditional groups favored a certain style of motorcycle, while the on-line groups did not. Why? Because the cities selected for the traditional groups had a higher penetration of this product. By using a national sample, we found that this style is actually less popular nationally than our client expected.

What's more, the on-line participants were more committed to the project. The tasks we gave them required greater effort and thought. They had to spend time taking pictures, viewing them on-line and labeling them, and also had to surf the Web to find just the right sites that would mirror their lifestyles and their relationship to their motorcycles. Ultimately being on-line provided the opportunity for data collection that was highly personalized and expressive.

Finally, we think the Web could be utilized even more for lifestyle studies, by having respondents design their own Web page. Talk about self-expression! As part of this task, we would require that participants build their page on one of the sites that simulates a city — like Talk City or GeoCities — because one of the first steps to building a site is to pick the "neighborhood" (theatre, sports, etc.) and the "street" where you want to live. This process could be most revealing of all.

Has the Web replaced traditional research? No, and it never will. But, as this study demonstrates, we market researchers are obligated to study and understand the medium, so that we can offer our clients a research tool that, for some studies, truly is a better way to collect data. □

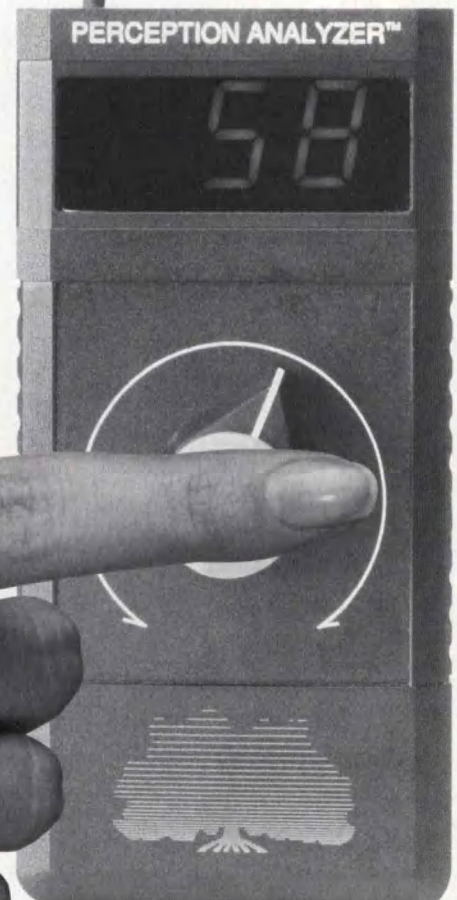
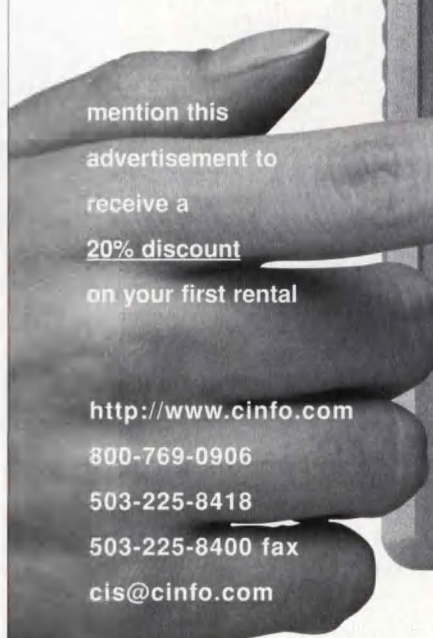
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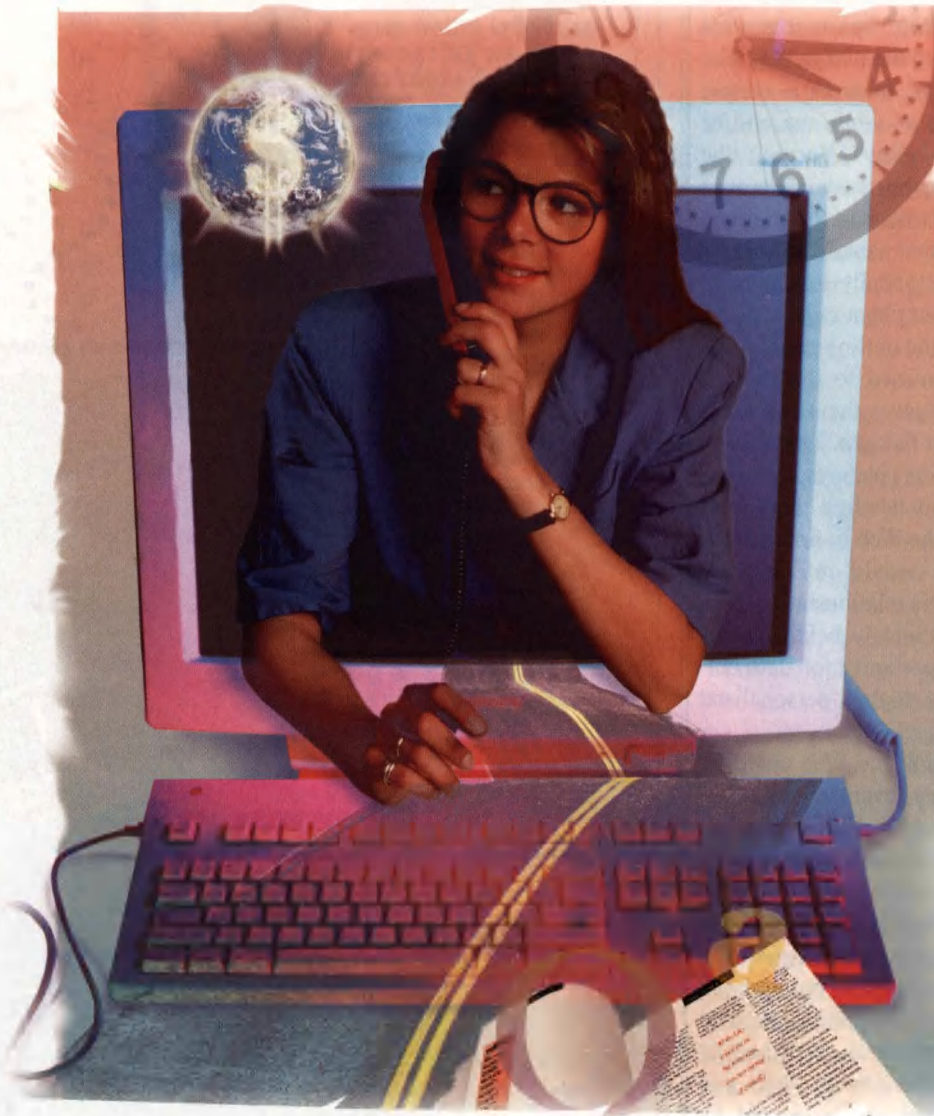
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Effective use of on-line research

By Rudy Nadilo



Editor's note: Rudy Nadilo is president and CEO of Greenfield Online, Inc., a Westport, Conn., Internet-based marketing research firm.

Imagine surveying thousands of your most important customers without having to pick up the phone or send a single piece of mail, and still coming in well under your

original budget. Now consider conducting a focus group during a blizzard and all the participants show up. Such feats are entirely possible with on-line marketing research.

On-line research is an efficient way to survey individuals with higher levels of education, slightly higher incomes, and greater probability of spending. These "consumers who

spend" (i.e., better-educated, higher-income individuals) are people with the money and the mind-set that make them the important buyers of most product categories, including packaged goods products. The Internet is proving to be the best route into the minds of these consumers. A well designed, thoughtfully executed, Internet-based marketing research

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sample delivers your most important consumers, faster, better and cheaper.

Consider the following example: a major international cosmetics manufacturer recently introduced a new beauty product which achieved a satisfactory level of first-time buyers but a low rate of repeat buyers compared to its chief competitor. The company knew they needed to act immediately to change their strategy before consumer habits solidified in their competitor's favor.

The company faced two research hurdles: low product incidence and a very specific research target group (frequent buyers of high-end cosmetics who had tried their product but rejected it). They worried that a traditional scanner panel would not produce enough relevant respondents. Furthermore, their budget was low, and they needed detailed results in less than a month. The company's research director decided they were ready to try their first on-line research project.

The on-line research project began with a pool of several hundred thousand households. During the space of

a week, participants were carefully screened for matches to the company's research criteria. Over the next week, participants logged onto the research Web site to answer nine different questions about the two competing cosmetic products and their reasons for buying one or the other and then not buying again. By the end of the third week, the data had been analyzed and delivered to the client.

The results were surprising.

Conventional research done before the product launch had suggested that the number of male consumers of the beauty product would be negligible. However, the scanner panel had not contained sufficient numbers of "consumers who spend." On-line research showed that male "consumers who spend" had a much higher trial rate (approximately 12 percent) than the general population of men (less than 1 percent), but that these males were switching to the competitor's product because its product seemed less feminine.

Conventional research had led the company to overlook a significant por-

tion of their most important consumers, because the "technically" representative research pool of the traditional sample diluted the impact of the product's actual buyers. The on-line research clearly demonstrated the importance of specific types of male consumers. The company immediately began targeting more of its marketing to men. Detailed analysis demonstrated that many of these men fell into two distinct groups: male college students and gay men — groups which are notoriously difficult to reach with conventional research but which are easier to access on-line. This finding led the company to begin very targeted and successful marketing campaigns in these communities.

Within months, the company's product had surpassed its competitor's product in overall market share, largely because it had captured more than 80 percent of the male market, nearly all of whom came from the group of "consumers who spend." The company's research director said that in the future he planned to use scanner panels only to determine the components of product purchasing (penetration and buying rate), but that on-line research was the best way to figure out the "who and the why" behind the penetration, particularly among "consumers who spend."

These consumers are important to marketers because of the 80/20 rule of thumb: 20 percent of customers drive 80 percent of volume. This principle is fairly accurate across nearly all consumer markets and is the main reason consumer panel research companies analyze the 20 percent of heavy buyers so carefully. Currently, much of that important 20 percent is on the Internet; conventional methods no longer offer the most cost-effective means for reaching them. An on-line research panel with hundreds of thousands of households can yield 10 times more heavy buyers than a similarly priced conventional scanner panel.

One of most important keys to the success of the previous cosmetics research project was the fact that it was done using computers. Because of the stigma attached to men who use beauty products, the company doubted

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that face-to-face interviews or telephone interviews (which might be overheard by the male participant's family or friends) would elicit honest answers. Many men might not have even admitted to using the product at all. Recent research published in the journal *Science* suggests that people are far more likely to answer honestly to a computer than they are to a person. Computers offer participants a feeling of privacy and anonymity.

Studies show that research conducted by live researchers (whether in per-

Within months, the company's product had surpassed its competitor's product in overall market share, largely because it had captured more than 80 percent of the male market, nearly all of whom came from the group of "consumers who spend."

son or over the phone) can lead participants to give answers that they think the researcher would prefer to hear defeating the entire purpose of marketing research. Computerized, on-line research simply delivers more accurate results.

Furthermore, on-line research typi-

cally generates more detailed responses. People love to offer their opinions, but dislike the intrusion of telephone interviews and the overwhelming length of paper questionnaires. In contrast, on-line research is done at the participant's convenience, when they are most enthusiastic about contributing. By removing the need to bring participants together in person, or to contact them via mail or the phone, on-line market researchers also provide their clients with efficiencies of scale. Finally, on-line research is simply more fun. Participants can be exposed to sound, color graphics and video, maintaining their interest and stimulating their responses.

Almost every sort of quantitative or qualitative research done conventionally can now be done on the Internet. Examples include tracking customer satisfaction, focus groups, package testing, copy testing, and nearly all other kinds of marketing research. As more consumers begin to use the Internet, more research will be conducted on-line. Companies that start taking advantage of on-line research now will be better placed to use Internet research to reach the even larger population of future Internet users.

Unfortunately, not all on-line research is of high quality. A number of firms take too many shortcuts as they simply take all the Internet users they can find to obtain a large enough pool of on-line research participants. Another common mistake many researchers make is limiting their research pool to just one Internet community or worse still, just one "opinion" Web site. Worst of all are research "spammers" who compile databases from responses to unsolicited e-mail.

As they hurry to utilize the Internet, some firms wander from good research techniques and use methods that would be unacceptable in conventional research. When used appropriately, by people who know marketing research, the Internet offers a great way for marketers to learn from their most relevant consumers more quickly, with greater quality and lower cost than traditional research. □



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The future of research is on-line



By Jeff Rosenblum and Chris Grecco

Editor's note: Jeff Rosenblum is director of Internet research, and Chris Grecco is director of quantitative research, at King Brown & Partners, a San Francisco research firm. Rosenblum can be reached at 415-512-1040 or at jeff@king-brown.com. Grecco can be reached at 606-335-1006 or at chris@king-brown.com.

The Internet is well on its way to becoming the world's most compelling entertainment, information and communication tool. Access to e-mail, databases, corporate information, newsgroups, and multimedia content like audio and video files enable users from around the world to access and exchange information more quickly and easily than most could have ever imagined.

Given these capabilities, it is not

surprising that the Internet is revolutionizing many industries, including market research. Internet-based research is becoming increasingly popular as companies regularly conduct on-line studies more quickly and more cost effectively than with traditional methods.

However, Internet-based research is not universally approved for all research projects. There are clear and consistent arguments against Internet-based research, and before developing an Internet-based research system, our company, King, Brown & Partners, Inc., found it necessary to address some key questions about conducting research on-line. These included: Are the demographic characteristics of the on-line survey population consistent with those who are not on-line? Are there attitudinal or experiential differences inherent in

having on-line access that bias the way respondents perceive products or services? Are there measurable benefits of using the Internet as a data collection tool?

Power and ability

We addressed these arguments against Internet research and weighed them against the Internet's power and ability to enhance the research process. Confident in the potential of this new research tool, KB&P launched an Internet-based research system in early 1996.

After completing many on-line projects, we have gained an appreciation for the research capabilities of this medium. We have found that the Internet has fulfilled its promise of being an effective and efficient tool and on-line projects have become the fastest growing area of research at

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KB&P. Some of the benefits we have experienced include:

– Cost and time savings: Compared to traditional research methodologies, on-line studies are conducted with an average savings of more than 40 percent in cost, with commensu-

Average Project Data Collection Costs



KB&P has found that average total quantitative project costs for Web-based surveys are forty percent less expensive than telephone surveys.

rate reductions in cycle time.

– Increased accuracy: While some audiences are more difficult to contact on-line, other targets are significantly easier to reach and more receptive to completing surveys via the Internet (e.g., regular Web users, MIS managers, employees for personnel surveys).

– Increased concept testing capabilities: By enhancing the questionnaire instrument with graphics or multimedia elements in surveys, Internet-based research is a more compelling stimulus environment than traditional methods. Respondents who see or hear a new product or advertising concept provide more valid and richer responses than those who simply hear the concept read to them over the telephone.

– Greater survey control: On-line surveys have greater control with regards to interview bias, sampling, skip patterns, awareness testing and stimulus materials.

Case study I: Internet-based research to develop Web sites

Our firm began working with the Discovery Channel in 1996. The first projects that we conducted were related to their Web site, Discovery Channel On-line (DCOL). At the time, DCOL management was interested measuring site usage, perceptions, demographic characteristics

and Internet usage of its visitors. Because the audience was exclusively Internet based, on-line research was the most appropriate methodology.

Using a Java-based intercept link on various pages within DCOL, we surveyed a relatively non-biased audience in a fraction of the time and cost that it would have taken using a telephone or mail survey. Perhaps even more important, however, was that the study simply would not have been feasible to

conduct via traditional means. Despite the fact that the site garners tens of thousands of visitors each day, trying to find DCOL users randomly by telephone (i.e., “dialing for dollars”), would have been cost-prohibitive.

Using the intercept method, we were able to conduct roughly 600 random interviews in one week. Because all survey responses were immediately downloaded to a back-end database (no keypunching needed), data cleaning and tabulation was completed in 24 hours. Preliminary findings based on the 600 completed surveys were available within 10 days of launching the study.

More impressive than the cost and time savings was the accuracy of the findings. By interviewing respondents while they were in the process of using the site, all of the issues covered in the survey were fresh in respondents’ minds. And, with the large dataset, we were able to undertake detailed subgroup analyses with statistical validity and then report differences with confidence.

Another benefit of conducting

Web-based research is the ability to conduct follow-up projects quickly and easily. All information from respondents was downloaded into a proprietary DCOL database. When DCOL management is interested in exploring specific issues related to the research findings or among a smaller group of its users (e.g., nature or science lovers) we can quickly recontact those users via e-mail and invite them to participate in a more targeted quantitative survey or qualitative exploration.

Case study II: Conducting on-line research to explore issues related to off-line services

While Internet-based methodologies are a relatively obvious solution for most projects related to commercial Web sites or on-line services, many questions remain about using the Internet for conducting research related to off-line products and services.

We have found that there are argu-

Average Project Data Collection Time



KB&P has found that data collection time for Web-based quantitative surveys are more than sixty percent faster than telephone and mail surveys.

ments both for and against using on-line research, and that they usually fall into either of two schools of thought:

1. As long as the demographic characteristics and attitudinal differences between on-line users and non-users are isolated, the only difference between the two methods is that one audience has an Internet connection and the other does not.

2. Those with an Internet connection can have substantially different demographic and psychographic profiles, so the research may yield significantly different findings.

We believe that there is no definitive answer and that each project must be analyzed on a case-by-case basis. We find that using a combina-

data by distributing postcards to in-store customers, inviting them to complete the survey either by calling a toll-free 800 number or visiting an on-line survey located on a KB&P Web server.

the foreseeable future. We also understand that although quantitative research has proven to be extremely effective when conducted on-line, there are times when it simply will not prove to be the best technique (for example, conducting research with the elderly or the poor).

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Sample Online Survey

In order to serve you better, we're conducting a survey of our visitors so that we can get a better understanding of who you are and your satisfaction with our site. The entire survey will take around 5 minutes to complete. Thank you for your participation.

1. Approximately how many times have you visited this site in the past three months?
_____ times

2. Please rate this Web site on the following characteristics:

	Excellent	Good	Average	Fair	Poor
Your Overall Satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Usefulness of Content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to Find What You Are Looking For	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Site Speed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Layout and Appearance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. What do you like most about this Web site?

One in five completed the on-line version, which is roughly the same percentage as the number of U.S. households with on-line access. This resulted in savings of 20 percent off of the data entry costs.

Still, for most projects when clients are Internet-based or involved with high technology products, we will almost always recommend conducting quantitative projects on-line. For other studies, we will continue to use a case-by-case perspective and weigh the advantages and disadvantages of each approach before finalizing a methodology. As with The Nature Company visitor survey, we may conduct a portion of the research off-line to ensure that our on-line findings are consistent with non-Internet enabled respondents.

tion of both on-line and off-line methodologies is often the ideal approach. On-line methodologies provide substantial cost and time savings. Traditional methodologies ensure that the on-line data is consistent with proven techniques.

We recently used a dual-methodological approach when conducting research for an off-line Discovery Channel product. Discovery Channel recently purchased The Nature Company's retail operations. When the purchase was finalized, Discovery management needed to understand customers' usage, perceptions, and satisfaction of the store and its products for baseline measurements.

Because we had many research objectives to cover and our survey was extensive, we knew it would take respondents a considerable amount of time to complete. We realized that we could achieve a better response rate and save money on interviewing costs by allowing respondents to take the survey on their own instead of being interviewed at the store locations. Thus, we decided to collect the

ences we found between the on-line and telephone surveys were on demographic characteristics. Not surprisingly, those who responded on-line were more likely to be male, educated, and affluent, characteristics consistent with the general Internet community. When these demographic characteristics were isolated and normalized, responses to key survey questions on store perceptions and levels of satisfaction were consistent between the two methods.

Thus, we conclude that giving potential respondents the option to complete the survey on-line does not create survey biases. And, in fact, it may decrease non-response bias by including respondents who would not ordinarily respond to surveys through traditional means.

Looking forward

Despite our successes at conducting on-line research, we still don't feel that Internet-based research is the ideal solution for all projects at all times. We believe that qualitative studies will continue to be better-deployed in-person than on-line for

Much of our decision-making revolves around one simple axiom: No research is perfect. Think for a moment about telephone research (which has not been recently scrutinized to the same extent as on-line research). We currently rely on interviewers to call strangers in the evening and ask them to answer questions about a product that they may or may not be interested in, at a time that may be inconvenient, without compensation. Oftentimes prospective respondents are either not home, do not want to participate at that time or do not want to spend time on the phone with a stranger. Now, compare that to the typical Internet-based survey, which is often more accurately targeted, is self-administered, contains multimedia stimulus, and can be taken at a time that is convenient for respondents. In this example, which method do you think provides a lower level of bias and more reliable results?

We believe that on-line research often is, and will increasingly become, the most appropriate approach. The future of market research is around the corner. And it will be on-line. □

Internet focus groups are not focus groups – so don't call them that

By Tom Greenbaum

Editor's note: Tom Greenbaum is president of Groups Plus, a Wilton, Conn., research firm. He can be reached at 203-834-1126.

One of the most talked about areas within the marketing profession is the use of the Internet to conduct marketing research studies. Many research companies have formed specific units to address the opportunities in this area, considering both qualitative and quantitative research studies.

One of the most disturbing outcomes of this process has been the attempt to conduct focus groups using the Internet, implying that they represent a cost-effective and time-efficient replacement for the traditional focus group. My problem with this comes not with the concept of trying to collect qualitative information on the Internet, but rather in attempting to imply that qualitative research conducted on the Internet could be a replacement for the real thing. There probably is some logic to trying to use the Internet to develop qualitative inputs, but it is absurd to imply that the work which is conducted would

be comparable to the output of traditional, professionally implemented focus groups.

The following will provide a few reasons why I feel very strongly that the research community is doing itself a real injustice by using the term "focus group" to refer to qualitative sessions conducted over the Internet. The basic principles that make focus groups an effective marketing research technique simply are not present in the Internet environment. Specifically, the following are areas where there are major differences between the two methodologies:

- **Group dynamics** — One of the key reasons to use traditional focus groups is to benefit from the interactions between the group participants, as this can provide excellent insights. In cyberspace, it is very difficult, if not impossible, to create any real group dynamics, particularly when the participants are reading from computer screens rather than interacting verbally.

- **Non-verbal inputs** — Experienced moderators will use non-verbal inputs from the participants while moderating and analyzing sessions. It is not

possible to duplicate the nonverbal input in an on-line environment.

- **Client involvement** — Many organizations use the focus group methodology because it gives client personnel an opportunity to experience some direct interface with consumers in an objective environment. Nothing can replace the impact of watching focus groups from behind the one-way mirror, no matter how good the videotapes, remote broadcast facilities, or reports written by moderators. With on-line focus groups, the client personnel only can monitor written responses on a computer screen.

- **Security** — When conducting focus groups, you know who is in the room, assuming appropriate screening has been conducted. With on-line groups, there is no way to be sure who is sitting at the computer. If you cannot see the person, how do you know who he or she really is?

- **Attention to the topic** — Another important benefit of the traditional focus group process is that the participants in the group understand that they are expected to stay in the room for the full two hours of the session and contribute to the discussion. It is very

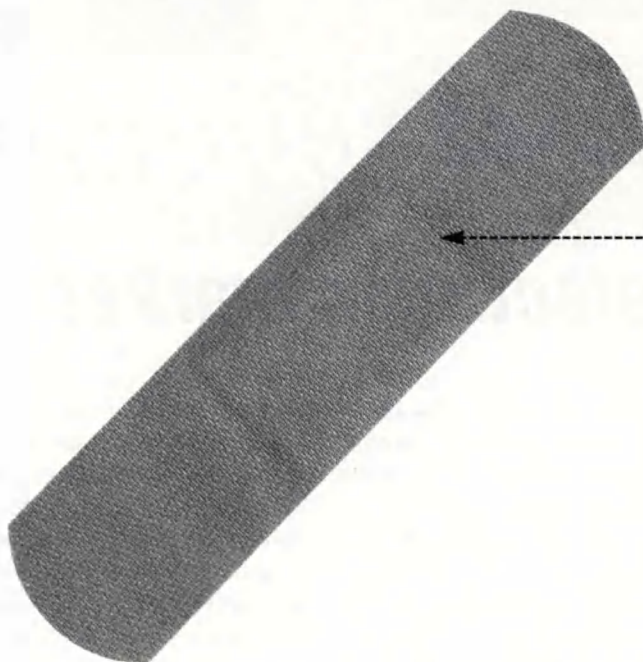
difficult for a participant in a well-moderated focus group to do something that could distract him or her from the proceedings. However, in an on-line environment, the moderator never knows if the participants are watching TV, reading a book or eating dinner while the session is proceeding.

- Exposure to external stimuli — A key use of focus groups is to present advertising copy, new product concepts, prototypes or other stimuli to the participants in order to get their reactions. In an on-line chat situation, it is almost impossible to duplicate the live focus group environment relative to the participant exposure to external stimuli. As a result, you have to wonder whether the input received is as valuable as it would be in a live environment.

- Role and skill of the moderator — Most marketing professionals agree that the most important factor in the quality of traditional focus group research is the skill of the moderator. Experienced moderators have developed techniques that involve more than simply asking questions of participants. A good moderator understands ways to draw out quiet or shy participants, energize a slow group, and use innovative techniques that will delve a little deeper into the minds of the participants. The techniques available to the moderator sitting at the computer are much more limited due to the lack of face-to-face involvement with the participants.

In summary, I feel the market research industry should continue to look for new ways to gather information, and clearly the Internet represents to most interesting new alternative in years. However, as professionals, we should not try to transfer the excellent credibility of the traditional focus group methodology to the Internet version, as the limitations of this approach are so extensive that they must be viewed differently when planning a research project. I hope that those companies which are pursuing the Internet focus group approach will continue to refine the technique, but the first step should be to change the name to avoid confusion with the real thing. □

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THE 100 commandments

of electronic market research

By Jon Buchwald

Editor's note: Jon Buchwald is founder and owner of Applied Business Intelligence, Inc., a San Rafael, Calif., business intelligence consulting and software firm. He can be contacted via his Web site at <http://www.biztelligence.com>.

The World Wide Web is becoming an increasingly popular medium for conducting market research. It allows smaller businesses that previously lacked access to a large base of survey respondents to carry out the opinion-based studies necessary for crafting a successful marketing strategy. Unfortunately, few surveys found on the Web are likely to provide good quality data upon which a strategy can be based.

While electronic (Web and e-mail) surveys are a valuable tool for gathering data, they have their fair share of built-in caveats, and must be constructed and structured carefully. Here are a few basic rules of electronic surveying that can help researchers and entrepreneurs get the most out of their questionnaire:

- Be respectful of your respondents'

time, and eyesight. Most respondents are on the Web for reasons other than your survey, and are likely to have a relatively low attention span. If the survey length is greater than your respondents' expectations, then you will suffer from a high breakoff rate. Keep your survey brief, and focused on what you want to learn. Observe a friend take the survey, and obtain feedback on its length and structure.

The look and feel of your survey is important, and simple is better. Survey respondents may suffer from eyestrain if your survey is too long or contains bright colors or graphics. Eyestrain is a potential source of respondent dissatisfaction, which may lead to poor data, and an increased breakoff rate. Avoid bright backgrounds; use cool colors. Try to avoid forcing respondents to scroll all over the survey. If a survey is lengthy, then break it into a few smaller pages, rather than having one huge page.

I once saw a 100+ question e-mail survey, in which respondents wrote comments like "Stop this!" in their open-ended responses.

- Don't assume that your phone sur-

vey will be successful on the Web. Many researchers assume that a survey designed to be administered by phone can be typed into an HTML form verbatim, and placed onto the Web. Phone surveys are controlled, and can be lengthy, whereas Web surveys are uncontrolled, and should be brief.

Before putting a phone survey on the Web, write down what you are trying to learn, and prioritize it. It is likely that a verbally administered survey will be too long for most Web or e-mail respondents. Make plans to cut or consolidate questions, in order to give your Web survey a concise look and feel.

- Keep in mind that electronic surveys are uncontrolled. If you are conducting a survey by e-mail or the Web, then you have no control over the amount of time your respondent takes to complete the survey, or what (s)he does between the first question and the last, nor can you rely on the respondent's state of mind, or sobriety. If response time is critical, or you need to be reasonably confident that your respondents had minimal inter-

ruptions while taking the survey, then set up a CGI script that records the time the survey is first accessed, and the time it is submitted ("cookies" combined with hidden fields also work nicely). Throw out responses with too large a time gap.

- Don't rely solely upon electronic surveys; mix your survey techniques. Web based surveys are inherently biased towards a more technically oriented segment of the population, and the fact that they are uncontrolled may lead to lower quality data. When possible, obtain some of your responses (>= 20 percent) using a controlled technique, such as a phone or live interview, and look for differences between responses obtained using different methods. Also, when possible, call some of your electronic respondents, and verify and/or probe their responses.

- Remember that browsers and modems are not created equal. If you are using graphics, Java, or a script like JavaScript or VBScript, then some respondents' browsers will not be able to cope with them. A respondent with a slow modem may become frustrated if there are lots of graphics to load. Frustration can lead to biased responses, and increase your breakoff rate.

If you require graphics in your survey, then ask for the respondent's browser type and connection speed, and look for response differences across browsers and modems.

- Avoid using canned questions. Some survey creation tools come with question libraries, supposedly designed by "experts." Avoid these, except for the most basic pieces of information (e.g., gender). Using canned questions is tempting, since it requires less thinking than carefully specifying what information is most important. However doing so will decrease the quality of the data you obtain. If you are able to articulate what you want to learn, the questions to ask will become clear.

- Don't expect respondents to flock to you...unless you attract them first. Asking Web surfers to take a survey is not unlike interrupting a TV program to ask viewers to take a survey. Your response rate is not likely to be high

unless there is some sort of incentive. Drawings for a cash prize often work nicely.

Don't forget to make potential respondents aware of your survey. While taking out a banner ad with a search engine may get you some respondents, it is expensive. Posting notices to electronic bulletin boards and newsgroups, and sending e-mail to potential respondents can be more cost-effective. Get permission before soliciting on a newsgroup or bulletin board.

If you are soliciting responses, then be sure you know who you are asking. Posting notices to a few specialized bulletin boards or newsgroups may inadvertently bias your results.

- If you are conducting a drawing, then be sure to conform to state and federal sweepstakes laws. Some states prohibit various types of drawings and contests. Provide a link to a complete set of contest rules from your survey site. Have a qualified attorney review the rules for appropriate disclaimers and language. If your winner is from a state that prohibits such drawings, then you may have to choose an alternate winner.

- Be aware of what your survey communicates, and take advantage of it. Surveys not only gather data, they communicate information to potential clients. If your survey is sloppy or

poorly structured it will hurt your reputation. A survey can be used to convey positive information about yourself (e.g., Please select the feature of our product that you think is the most valuable...), or negative information about competitors (e.g., Which of the following products has the poorest reputation for quality...Why?).

If you mention a competitor in a question, avoid making any undocumented direct statements about them. Use hypothetical cases, or ask questions about your respondents' opinions of their drawbacks. Ask respondents to elaborate on responses that are positive about you or negative towards your competition. It helps them to formulate good ideas about you, and arguments against your competitors.

- Respect your respondents' privacy. Use blind distribution lists to mass e-mail your respondents, and never give out their names, e-mail addresses, etc. If people get "spammed" as a result of taking a survey, then it hurts everyone who uses the Internet for market research, including yourself.

The Internet can be a cost-effective way to obtain quality information about both your clients and competitors. Following these 10 basic rules will help you to make the Web a powerful resource in your market research efforts. □

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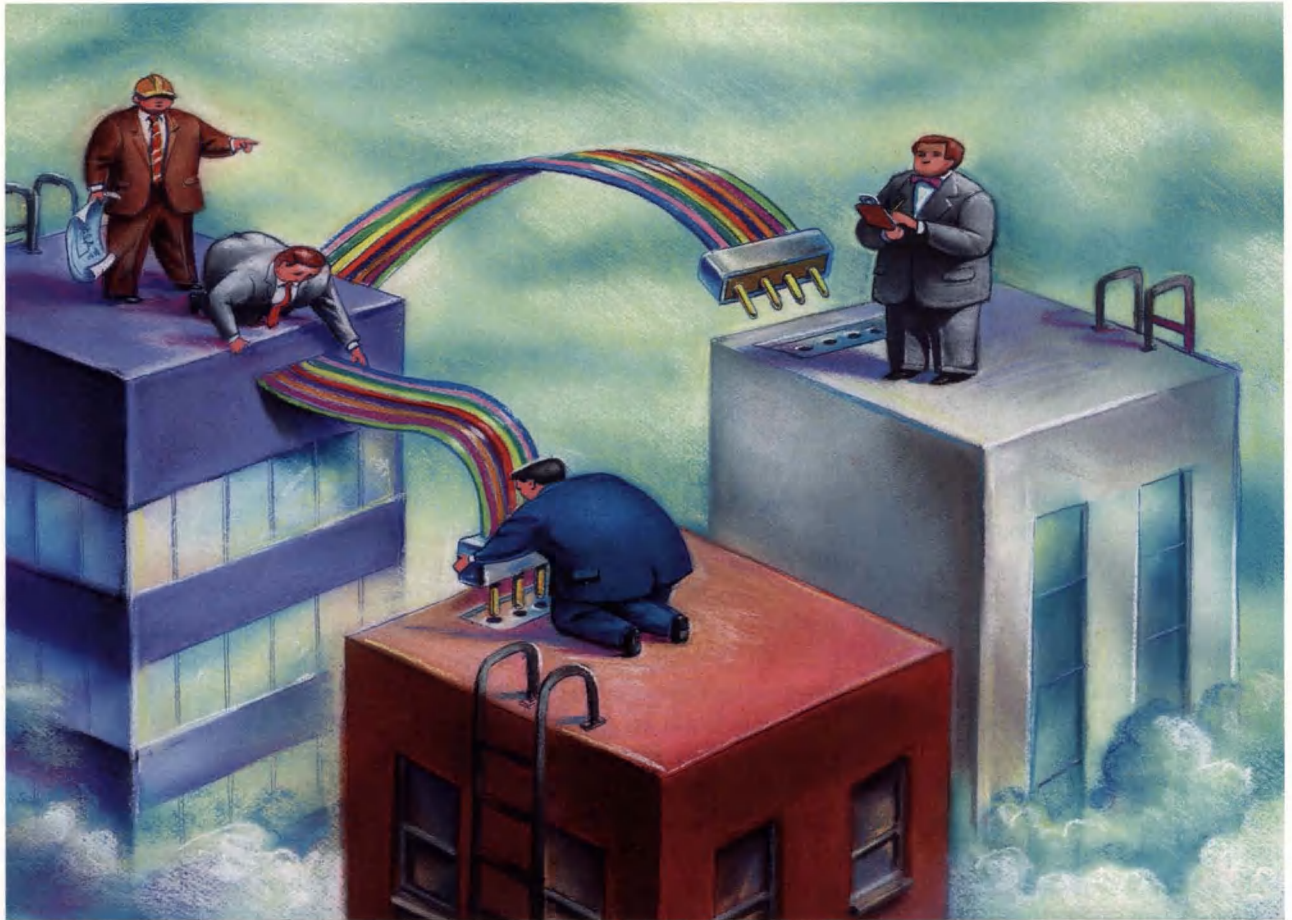
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Revealing
the online
customer mind.

Qualitative research



Using qualitative research to improve corporate intranet sites

By Randy T. Catron

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Intranet sites are becoming a common tool for communication within many companies. Unlike corporate Internet sites where the audience can be anyone in the world with Internet access, the intranet audience is typically limited to employees and

business partners associated with an organization.

The limitations on who may access an intranet create opportunities to communicate a variety of information that wouldn't necessarily be provided to the public, such as certain operational goals, performance results, or employee policies. It can also provide forums for employees to discuss and debate issues that are relevant to a company's progress.

Although intranet sites have a more narrowly defined audience, the challenges of communicating through the

intranet are very similar to those faced when attempting to communicate through the Internet. Issues such as navigation ease, site content, and graphic presentation are common to both intranets and the Internet.

The intranet at The Principal

The Principal Financial Group is a diversified financial services company with more than \$72 billion in assets. There are more than 18,000 employees worldwide who rely primarily on an electronic mail system and paper reports to communicate

and share information.

During the past two years more than three dozen intranet sites have been developed at The Principal by various departments, business units, and groups representing job functions. Typically, their purpose is to provide wider and faster dissemination of information to various target audiences, as well as to reduce overhead costs by using less paper and postage. Nearly all employees at the corporate headquarters in Des Moines, Iowa, have access to the intranet sites, as do many employees at external locations.

Developers of some of the intranet sites have asked the Management Services Research Team to analyze their respective sites with the purpose of refining the sites' information content, improving their usability and graphic appeal. Because intranets are a relatively recent communication medium and one that the team had not worked with, a new methodology was created to answer the research questions.

A qualitative approach

It is not uncommon to see questionnaires attached to Internet or intranet sites where the users are asked to rate the site using scales and text boxes. This methodology seems to make sense in this environment, since the questionnaire is delivered electronically in the same environment as the site.

However, this methodology does not capture the subtle reactions of the user to various elements on the site. Because the population we were researching was employees to whom we had direct access, we believed a qualitative, observational approach to the research would provide greater insight and richer information.

Our first customer requesting intranet research inquired about a focus group-type setting for the research. They envisioned eight to 10 of their potential users exploring the site in a computer lab, with a moderator in the room capturing their comments and ideas. The research team proposed a modification of that idea, suggesting a one-on-one user-researcher format rather than the

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group format.

A one-on-one format provided the following advantages:

- an opportunity to observe the user in his or her work setting, which would be a more comfortable and natural environment, and the one he/she would be in when accessing the site;
- a better setting for detailed questioning;
- a better opportunity to observe the user's cursor movements, mouse-click actions, and other physical movements that may explain how he/she interacts with the site.

Preparation phase

The research process began by meeting with the intranet site project leader and the designers (the research customers). At the meeting, the customers provided information such as their purpose for creating the site, any specific details related to the site they want explored by the research, and information about their target audience (the users). Most often the sites are intended for a segment of the employee population, such as employees who work with information technology (IT), although there are some intranet sites created for all employees, such as the human resources site at The Principal.

The customers either defined the potential user population so a sample could be randomly selected, or they specifically identified potential users who they wanted to participate in the research. We believe our customers were not attempting to bias the research with their specific selections; every person they selected provided both positive and negative feedback and none had worked on the specific intranet site project.

After eight to 12 research participants were identified, they were contacted and asked to schedule one hour of time for the research. Generally one hour is sufficient for data gathering, and in many cases, the participants completed the process in less than an hour.

After conducting two intranet projects, it seems there are two primary classifications that apply to the participants: those who are experienced or inexperienced with Web-type applications, and, those who are interested or mildly interested in the information contained on the intranet site. Ideally it is best to include a mix of participants from each of these classifications.

As is common with much qualitative research, many participants brought up similar issues, ideas and concerns. However, it was interesting that nearly every participant identified or commented on at least one aspect of the site that was not noticed by or did not concern the other participants.

The data gathering process

A three-step process is used to collect data from the participants: a pre-browse interview; the browsing activity; and a post-browse interview. Ideally the three steps will occur at the participant's workstation with the researcher observing from a side chair.

The pre-browse interview is analogous to a focus group warm-up. It provides an opportunity for the participant to become comfortable with the researcher and to initiate communication. It occurs prior to the participant bringing the site up on their computer screen. Usually the following information is gathered during the pre-browse interview:

- basic demographic questions such as job title, years employed;
- current sources of information related to the focus of the site;
- types of information would they expect to find on the site;
- previous experience with intranet or Internet sites.

For the browsing activity, the participants are asked or instructed to load the site on their computer. At this time the researcher is looking diagonally at the screen, mouse, and keyboard with the participant's back to the researcher. From this vantage point it is possible to observe the par-

ticipant's actions and reactions to the intranet site.

Often the browsing activity starts by asking the participant to verbally describe his or her reactions to the overall design and content of the site's home page. Next the participant is asked to view every major element of the site and think out loud, describing what he or she is thinking while exploring the site. The researcher listens to the participant, watches the cursor and mouse movements, and looks for other cues (such as a pause in action) that indicates a reaction to some aspect of the site. If the participant does not verbalize a particular action, the researcher probes for understanding. (An example might be a participant's quick click on some words that are not hypertext. This occasionally happens when the words are a color other than black or the color used for hypertext.)

The researcher may record the sequence followed by the participant when exploring the site. Another helpful observation is to ask the participant to start at the site's home page and then locate a very specific piece of information (such as the date of a particular training class). It is valuable to note how participants use different methods to locate information. (Some participants will use the site's search feature; others will go to one or more locations on the site where he or she thinks the information should be located and then drill down.)

During the browsing activity the participant is not required to view every element of the site, just the front page of every major section. Some will choose to drill down several layers into one section, but only look at the front page in another. This may be a reflection of natural behavior had the participant explored the site in a non-research setting.

Often a participant's comments and reactions to an intranet site can be assigned to one of three categories:

- Content: the type of information presented on the site, how it is organized, and how it is presented.

- Navigation: how easy or natural it is for the participant to move within and around the site.

- Graphics/design: whether the color or design of the site enhances or inhibits the participant's ability to process the information or navigate the site.

The following are examples of participants' comments about intranet sites we have researched:

Content: Several participants commented that a "job listings" section was in the incorrect location. It was placed within a section titled, "People," but most participants said it should be in the section titled "Career Management."

Navigation: Several participants found links that were dead-ends (incorrect reference addresses). Also, navigation buttons were not available in the locations where the participants expected to find them.

Graphics: Several participants commented that a light gray patterned wallpaper made the black text difficult to read. Also, a site required too much scrolling down to access the content that was often off the bottom of the screen.

The final step in the process is the post-browse interview. The purpose is to ask summary-type questions and to provide an opportunity for the participant to share final suggestions and ideas. Often this step requires very little time unless the participant wants to re-review certain sections of the site.

Analysis and reporting

After collecting the data, the notes on each participant are reviewed for differences and common themes. The primary objective of the analysis is to provide information and guidance to the site's creators that will enable them to communicate more clearly and provide content that meets the needs of their target audience.

Typically the report follows a format that includes background, methodology, and a review of the participants' reactions to each major section of the site. The comments can

often be categorized as content-related, navigation-related, or graphic/design-related. The report usually is completed by the researchers' recommendations about the major items that should be modified on the site.

Provide guidance

It would be helpful if the creators of an intranet site conducted research on their potential users prior to developing the site. This would provide

them with guidance on the specific types of information that should be included and excluded from the site, as well as information on how it should be organized. However, many times this doesn't happen.

This type of research, like the intranet, is new for our research team and we are continuously refining the methodology. Overall, our customers have been pleased with the outcome of the intranet research and have perceived it to be valuable. □

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Measuring and improving Web site design - case histories & insights

By Scott Young

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To develop effective Web sites and measure their impact, marketers need to regularly gather the input and feedback of site visitors. Web site-based surveys, in which people are "intercepted" and questioned as they visit a site, are a fast, affordable way of carrying on a dialogue with site visitors. The following case histories illustrate how surveys are being used to address a broad range of Web marketing issues.

- A media company wanted to gath-

er information which would assist in the sale of advertising space on its Web site. Over the course of one week, every 50th visitor to the Web site was intercepted and asked to participate in an on-line survey. Nearly two-thirds of those asked chose to respond, resulting in over 2,300 responses. The survey uncovered that a majority of the site's visitors had made purchases over the Internet — a fact which was used in promoting the site to advertisers. In addition, it found that the Web site was extending the "brand" to a new audience not familiar with the television channel.

- A publisher wanted to document the value of its Web site in driving off-line book purchases. For two

weeks, a screen icon was placed at different sections of the Web site, inviting people to participate in an on-line survey and offering a free book as an incentive. Over 2,900 people chose to take the survey, which confirmed that the site was influencing several million dollars of sales taking place at traditional "brick & mortar" book stores and/or other Web sites. It also revealed that most site visitors were extremely heavy book purchasers (over 20 books/year) — and that many had become aware of the site through off-line advertising. These insights confirmed the value of the Web site in reaching and influencing book buyers — and guided decisions regarding content, design

and site promotion.

- A travel-oriented Web site wanted customer feedback to guide the development of new site features. Over one month, 650 people completed an on-line survey, which asked them to discuss their reasons for visiting the site, rate the site on different dimensions (i.e., content, navigation, etc.) and react to several new content ideas. The survey confirmed interest in a customized travel planning service and provided guidance for its development. It also uncovered a demand for improved maps and revealed that changes in design were needed to facilitate the printing of different pages/screens.

While site-based surveys can play an important role in Web site design and assessment, their value ultimately depends upon how well they are implemented: Poor sampling or survey design can result in misleading findings. With this in mind, here are several guidelines to consider in developing and using site-based surveys.

- Actively intercept site visitors. To gather the most representative sample of responses, it's best to actively intercept site visitors (i.e., every 20th or 50th visitor) rather than simply posting an icon/link. If a random-intercept is not possible, consider offering an incentive for participation, yet keep the potential cost of fulfillment in mind — and beware that this may draw first-time visitors in search of giveaways. A link without an incentive is essentially the same as the "leave us your comments" icons on most Web sites — it will draw relatively few responses, which brings into question the projectability of the feedback gathered (i.e., Are these responses representative of all visitors to the Web site?).

- Keep it short. Even if you offer an incentive, it is best to keep the survey to roughly 10 questions, or five minutes of each visitor's time. Beyond this point, you run the risk of boring people — and gathering responses which are not serious, thoughtful or

complete.

- Include open-ended questions. When asking people for their time, it's important to give them the opportunity to speak their minds and make comments/requests in their own words. Asking only closed-ended, multiple-choice questions is short-sighted, because they will inevitably miss some unanticipated problems and opportunities. At the very least, each survey should include a question asking visitors for their ideas to improve the site (i.e., How can we make it better?).

- Differentiate between first-time and repeat visitors. The feedback of repeat visitors is usually quite different from that of first-time visitors to a site — and far more relevant to marketers with respect to measuring the impact of the site (i.e., Has it influenced visitors' attitudes and actions?). For this reason, repeat visitors should be identified (through a survey question) — and their responses should be analyzed separately. In addition, you may want to actively discourage first-timers from taking the survey before fully visiting/viewing the site.

- Use site-based surveys appropriately. To use site-based surveys effectively, it is important to understand their limitations. To begin with, they

are not the place to share confidential ideas, because your competitors are among the most frequent visitors to your site. Surveys are also not an ideal forum for guiding initial design or gaining an in-depth understanding of site visitors. Both of these objectives require more thorough discussion, and are thus better-suited to focus groups or personal interviews.

As these points suggest, site-based surveys are not the answer to every Web marketing issue, nor are they a replacement for traditional off-line research. If used properly, however, they can be a valuable tool for periodically taking the pulse of Web site visitors and gathering the feedback needed to assess and improve design. Ultimately, Web marketers who invest in this dialogue will have a better understanding of their site visitors and the insights needed to make their sites more compelling and effective.

□



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Data Use

continued from p. 16

dia programs (if they are really multimedia) can use sounds, images, and even little animations or movies in addition to standard text. Sometimes, you will see a program called "multimedia," even if it can do no more than play a simple Windows ".wav" file (like the one that says, "Welcome!" every single time you start America Online). Fortunately, Sensus Multimedia does much more than that — as we will see below.

Decisive Survey by Decisive Technology allows you to do interviewing over the Internet and by e-mail. The program handles both creating the surveys and gathering the data.

Survey Said by Marketing Masters does interviewing over the Internet, like Decisive Survey. Also, like Sensus, it allows you to do various types of PC-based interviewing.

Sensus Multimedia

Sensus Multimedia (version 2.0) shows how detailed knowledge of interviewing and research practices can help make a better interviewing package. Sensus comes from Sawtooth Technologies, a firm with long experience in market research (some of you may be familiar with their Ci3 CATI interviewing package). Version 2 packs nearly all the question types and question sequencing options that you are likely to need. It lets you lay out an attractive PC-screen-oriented questionnaire, using multiple fonts, pic-

tures, sounds, and even animation or movies. You can run the resulting questionnaire on a PC, or send it out as a disk-by-mail survey.

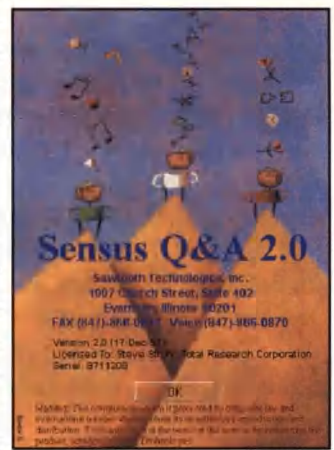
Many useful features

Perhaps the quickest way to give you an idea of Sensus' capabilities is to show a checklist (see below), with the features new to Version 2.0 highlighted in italics, and with a special symbol ✓.

Some terms in the checklist may require explanation, especially among the newer features. Those of you who already know all the latest terminology can safely skip to the next section.

Under question types, we have several terms that may require explanation:

- "Analog rating scales" means a sliding scale or slider, like the one in Figure 1
- A "roster" is a page in which a respondent evaluates a series of items on the same rating scales, but is not a "grid" (discussed right after this). Rather, items rated and the scales on which they are rated both are rotated. The program displays each combination of items and rating scales, and then goes on to the next. These go by one at a time on



<p>Questionnaire Design Point-and-click interface Drag and drop to move and resize objects Unlimited colors Unlimited fonts, typefaces, sizes Printable questionnaire ✓ <i>Text undo/redo</i> ✓ <i>Text search and replace</i> ✓ <i>Text import from Word or WordPerfect</i> ✓ <i>Spell checking</i></p> <p>Question Types Numeric Formatted numeric (e.g., phone numbers and dates) Open-end Single choice Multiple choice Ranking Other/specify ✓ <i>Constant sum</i> ✓ <i>Analog rating scale</i> ✓ <i>Grid</i> ✓ <i>Constructed list</i> ✓ <i>Roster</i></p> <p>Operating Systems Windows 3.1 Windows 95 Windows for workgroups Windows NT</p>	<p>Response Options Buttons Text input Scrollable input ✓ <i>Sliding scales</i> ✓ <i>Radio buttons</i> ✓ <i>Check boxes</i></p> <p>Randomization of: Responses in a question ✓ <i>Questions</i> ✓ <i>Groups of questions</i></p> <p>Sequence or Logic Skipping and branching Incorporating responses in later questions ✓ <i>Nested logic</i> ✓ <i>Mathematical computations</i></p> <p>Standard File Formats Sounds and narration using WAV files Images using BMP files ✓ <i>Images using DIB, JIF, JPG, PCX, TGA, TIF, WMF, and WPG files</i> Movies using AVI, ✓ <i>MPG and MOV files</i></p> <p>Questionnaire Design Drag and drop to move and resize images ✓ <i>Images can disappear once selected</i></p>	<p>Interview Administration Computer-Aided Personal Interviews (CAPI) Computer-Aided Self-Administered Interviewing (CASI) Disk-by-Mail Kiosk</p> <p>Interview Input Options Touch-screen Pen Mouse Keyboard</p> <p>Data Delimited and user-definable output ✓ <i>Import/export data to other programs during interview</i> ✓ <i>Open-end coder</i> ✓ <i>Summary statistics</i> ✓ <i>Marginals</i> ✓ <i>Two-way crosstabs</i> ✓ <i>Data editor</i></p> <p>Sensus Advanced Development Environment Complete environment to create Custom Sensus capabilities</p>
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the computer screen, and so could take a while for a long list of items rated on many scales.

• A “grid” is more familiar, looking like a table in a word processing program, with the items evaluated as the row

stored. Interestingly enough, Sensus will not play the animated GIF files that are becoming so popular (and annoying) on Web sites these days. We are anticipating ourselves

In the grid below, please check the ways you use each brand of breakfast substance (choose as many as apply)						
	For breakfast	For lunch	For snacks	For kitty litter	To clean the garage	Midnight snacks
SoggyOs						
Kardboard Krunchies						
Sorghum Snax						

headings and the columns as the items or scales on which these are rated. The example above shows how a grid might work.

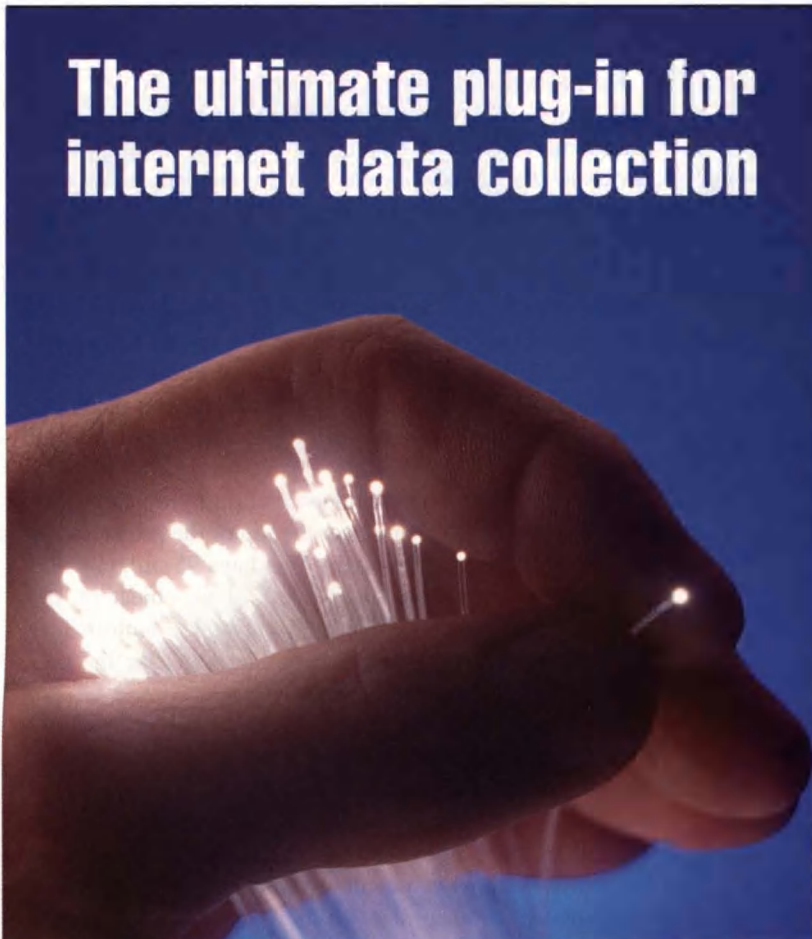
Under response options, “radio button” means a small circle that changes from hollow (white) to black when clicked. It differs from a (plain, unmodified) “button,” which is a small object (round or square) that you push on the screen. These terms are, by the way, standard Windows terminology — so if you did not know them before, you have just learned something crucial to your ongoing existence.

The various file formats are used for sounds (WAV files), still pictures (BMP, WMF, WPG, DIB, JIF, JPG, PCX, TGA, and TIF), or pictures that move (AVI, MPG and MOV). If nothing else, these show not only that Sensus is versatile in handling file format, but also that Windows has not brought with it any standardization of how data gets

here; a discussion of the Web is yet to come.

Some excellent features

Among Sensus’ many fine features, some of the best are found in its abilities to incorporate earlier responses into later questions. It even can do calculations that follow through to later answers. For instance, suppose you fill out a survey on tractors, and say that you have two Fords, three John Deeres, and four International Harvesters. In a later question, the package could then ask you “Thinking about your nine tractors . . .” It could then go on and ask you questions about your two Ford tractors, your three John Deeres, and four International Harvesters. In short, it remembers what you said, it can add, and can come up with the appropriate phrase at the appropriate time. It can even multiply answers, or use them in calculations with parenthetical logic — and show the results to the amazed respon-



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dent. This is pretty smart for a computer.

Working with Sensus

You almost certainly will satisfy nearly all your survey-related needs with the basic Sensus Multimedia package. Sensus also can include its own programming language module, Sensus ADE (at an extra cost), and this allows you to extend the capabilities of the package even further. Sensus ADE looks somewhat similar to Visual Basic. So if you know something about Visual Basic and you like programming, you should find this familiar and perhaps even congenial to use. (We will be discussing the basic multimedia program here, not the ADE language.)

Sensus appears as several programs, each of which handles one aspect of its operation. These parts are called:

Create	Coder	Data Extractor	Help
Data Mover	Data Viewer	Field	Statistics

Figure 1 shows the Sensus multimedia "Create" program, which is where you put together the survey, and where most users likely will spend most of their time. As the figure suggests, quite a bit can happen in this part of the program.

This screen shows you some of the many types of questions and "objects" you can build into a Sensus interview. The area with the gray background corresponds to what the respondent would see. To the left is an actual movie, in the

AVI format. With typical video efficiency, it uses about 796,000 bytes for a whole two seconds of playing time. (This use of storage space is something to think about if you use Sensus for disk-by-mail interviews, since these interviews must go on a single floppy disk. Images or sounds that would require more than one floppy disk therefore, cannot go on disk-by-mail surveys.)

On the right side of the gray area, you see three types of questions. The topmost is a nice analog "slider," which records responses as numbers based on the position of the small sliding bar. You would need either to add some spe-



Figure 1: The Sensus "Create" Window

cial Sensus text, or to import a picture from another program with a numeric scale on it to get numbers next to this control. Sensus can resize and move pictures from other programs, but it cannot create or edit them. The image needs to look right before it gets to the program.

The next control below is a scrollable numeric, or "spinner," which goes from a specified minimum to a specified maximum value. The respondent uses the up and down arrows to change the answers with this control, or can type in a number.

To the right you will see a "property" window. The properties here refer to this control (the spinner), which you can tell (more or less) by its appearance — a small box outlines the control itself, which we selected on the screen with a mouse click. You will see in the "property window" that you can set many characteristics of this control, including its font, color, and the minimum and maximum values that it will accept.

To get this "property" window to appear, you can call it using the "Window" menu near the top of the screen or the F4 key. This differs from many Windows 95 programs, in which you can get the "properties" of an object on the screen by clicking on it with the right mouse button. This does not happen in Sensus yet, perhaps because the program also runs under Windows 3.1.

The lowest control in the gray area (which corresponds to what the respondent sees) is called a "masked numeric field." This means that it will not accept any answer above a certain value. This one will take any number with no more than three digits. We added appropriate instructions for those who want to enter values of 1,000 or more. Incidentally, another nice touch is that you can set the

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masked field to accept only a certain numeric format, like dollars, or percentages.

To the right of the gray area, and below the property window, is another small window that shows you where you are in the questionnaire. This allows you to navigate from one page to the next easily.

At the bottom of the diagram, you see two menu bars, one labeled "edit" and the other (with a title much harder to read in the figure) labeled "objects." Only one of these bars can be active at a time, which explains why the objects menu is less visible — at the time of the screen capture, it was sitting there inactive, or inert. The edit bar is for text only. So you either can edit the text on the screen, or the other "objects," such as the controls, at any one time.

Sensus has other fine features that do not appear on the screen. For instance, it lets you check the questionnaire logic and skip patterns starting at any point in the questionnaire. You can go directly to the section you need to test, and run everything from that point forward.

Some problems: a few thorns on the rose

Sensus 2.0 does some marvelous things. Still, a few things about it just did not work quite right. Nothing led to irremediable problems, but Sensus caused a few irritable moments. Let's start with the more vexatious of these.

We cannot say that installation went without a hitch. We tried to install the program on the E:\ drive of one of our PCs, which did not work well. The installation ran, and the program appeared, but it kept looking for files it needed on

the C:\ drive. A call to technical support revealed that Sensus in fact will only run properly if installed on drives designated as either C:\ or D:\. The program documentation did not mention this.

Sensus comes on a set of six floppy disks, so reinstalling was not entirely painless. Limiting installation to only the first two drive letters is one restriction that the makers of Sensus need to eliminate.

Also problematic to us was that critical elements in the questionnaire disappeared using a standard monitor resolution and set-up. In particular, using the "large fonts" option (which was preset in the Windows display panel) made two key questionnaire controls disappear. The items that vanished were the "Next" button and the "Back" button that appear in the questionnaire, and without these you cannot go from one page of the questionnaire to the next.

Eventually, Sawtooth found a way for us to get these buttons back on the screen, but it was not readily apparent. Before we found out about this we fell back on changing the Windows screen display set-up to use "small fonts" instead. As we will describe, this could make you very irritated.

There was no warning that parts of the questionnaire could vanish if your PC uses "large fonts." Sawtooth provides a nice, thorough-looking description of screen resolutions in their manual, but somehow this piece of information did not make it there. (We would strongly suggest that Sawtooth add some warning about this problem. Even a small sheet of paper slipped into the front of the software



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manual would help.)

Anyhow, at first, it just seemed that the program would not work. No control buttons on the screen would mean that respondents never could get past the introductory page. This could lead to some highly undesirable results if you try to use the program for disk-by-mail surveys. Almost certainly, most people who had a problem like this would, at best, throw the survey away. You also might hear some language over the phone from them that you genuinely would not appreciate.

Unfortunately, without Sawtooth's secret work-around, dealing with this problem was a nuisance. You will need to restart Windows to change from "large fonts" to "small fonts." (You need to do this even if you have that nice Quickres software gadget that Microsoft gives away with its PowerToy software bundle. Quickres lets you change the resolution of your screen display without restarting Windows, and you can get it from Microsoft's Web site — and yes, it and the entire PowerToy bundle are absolutely free.)

One of us (Struhl) really dislikes small fonts. They make Windows menus and much of the other text on the screen much harder to read. So switching to them from the big fonts has a high nuisance quotient.

Unfortunately, Sawtooth's work-around also requires a lot of work. You need to find the object (like the "next" button) listed in the "properties" window, highlight its name, and press the "Control" and "Home" keys together. The control jumps to a place in the corner where you can see it, but probably not where you want it. You will need to repeat this and drag the control where you want it on each questionnaire page.

It would all be much easier if the program worked with large fonts in the first place. This one aspect of Sensus seems more than ready for an upgrade.

Aside from these two problems — which need fixes — the program had a few other areas in which performance could use a slight boost. Oddly enough, Sensus seemed to behave less flexibly in its handling of text (i.e., questions that appear on a page) than in its handling of the various controls and objects that you can add. (Sensus actually has two kinds of text, but the kind that is easy to move doesn't have flexibility in fonts and colors, and vice versa.) The text that you can format best finally will go where you want it, with a little work. You cannot push and pull these nicer-looking text "blocks" using the mouse, as you can with nearly any drawing or desktop publishing program. You need to set the size and position of this text with a dialog box that you call up from the edit menu. Figure 2 shows the dialog box that you need to use, to set where this text appears.

Anyhow, having two different types of text, and making the nicer one (that you will want to use) require this dialog box, makes formatting a little cumbersome. Unfortunately, the nicer text also tends to "bump" the other objects (controls and buttons) on the page when it is moved or changed, so lining up things on the page required a fair amount of work.

Overall, this part of the program seems to need a little

fixing. We would like to see Sensus make text into one type of object, and make that work like other objects, so you can format, maneuver, and resize everything on screen, using a

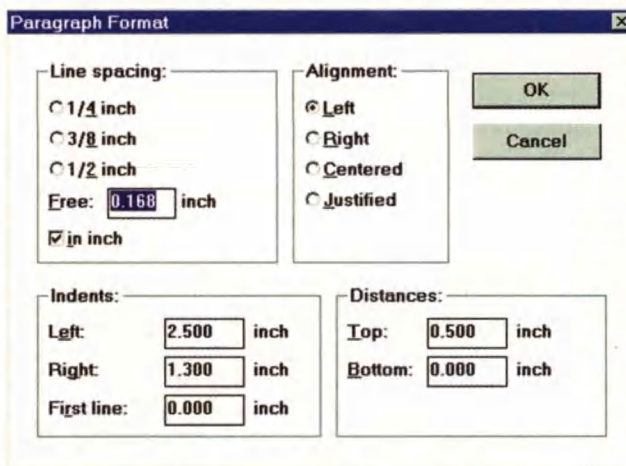


Figure 2: Sensus Paragraph Formatting Box

mouse.

We have one final caution about sending out disks to field services. If you have multimedia objects, expect the interview to run across several floppies. Even without small movies included in the interview, your survey likely will take up several diskettes. The program will "install" these, along with a Sensus "field" module to run the survey on another PC. If you include a batch of pictures, a movie or two, and some narration, you will wish that PC makers had long ago standardized on the nice 100 MB Zip drive, or the nearly as nice 120 MB super-floppy. You may end up swapping in quite a few disks for the survey with each holding a mere 1.44 MB.

Sensus overall

Sensus Multimedia costs about \$2,000, and is well worth the investment if you need strong multimedia interviewing capabilities. It is powerful and full-featured, and does many remarkable things. The makers of Sensus obviously have applied long experience in market research to the design of the program and its features, and it shows. Grumbles about the program reside in two principal areas: problems with the video display that required resetting Windows' basic display properties, and some awkwardness in moving the question text in the display. We hope that Sensus will work on these areas — and allow you to install this product on a drive with a letter higher than "D." If Sensus can resolve these problems, it will really deserve that title the programmers love the most: a "killer app." Even with a few things left to resolve, Sensus is the best PC-based interviewing package we have seen yet.

Internet and World Wide Web: a brief primer

Before we start with our Internet interviewing packages, we'd like to give you a brief review of the key terms. If you are one of those lucky people who (think they) know everything there is to know about the Web and the Net, you can skip right to the next section. For the rest of us, let's start

with the basics.

The Internet is a huge data network that spans most of the globe, linked by an enormous assortment of high-capacity data cables, over thousands of routing locations. Data that travels over the Internet get broken into small pieces, or packets, which get routed to their destination and then reassembled. They share their data pipeline with untold other packets, all going to their various destinations. This makes the Internet highly efficient, because it keeps the pipeline as full as possible at all times. (The routers are computers that figure out where the packets should be sent to keep things flowing.) This is very different from the transmission methods used by your friendly telephone company to connect your phone calls, where you get an entire line dedicated to your conversation, including the pauses and blank spaces.

This is all very impressive and wonderful technology, even if it does seem to get a lot of use for junk e-mail, going to the wrong places, aimless browsing, and downloading dirty pictures. (Not by any of our readers, of course.)

The World Wide Web is simply the component of the Internet with a graphical interface. For those of you who are not technically inclined, that means it is the part that looks a lot like America Online. Also, you will need a Web site of your own (or will have to borrow a friend's) to run either Survey Said or Decisive. Responses must come back to a specific location.

The Internet truly is growing explosively. For instance, a company that you most likely never heard of is just now

finishing up a data "backbone" across the U.S. that will have roughly 20 times the bandwidth (or capacity) of AT&T, MCI, Sprint and WorldCom combined. (By the way, the company is named Qwest. Didn't we tell you that you never heard of it?) No doubt all this capacity will soon find many new uses carrying data, much of it on the World Wide Web.

As another "for instance," data transmission speeds available to everybody are about to increase dramatically. Microsoft, Intel and the various Baby Bells (assuming more than one of them remains after they finish merging) have already cooked up a new and promising transmission technology called ADSL. This will work on current equipment, including copper phone wires (they say), and run anywhere from 20 to several hundred times as fast as your modem does now. Of course, the Baby Bells are the same crowd who took a promising technology called ISDN and made it so expensive and horrendously complicated that they managed to scare away nearly all potential buyers. Still, Microsoft and Intel, which at least know how to make products that people will buy, may have enough to say about ADSL that it will work reasonably well. If not, there's another competing technology right behind it.

The conclusion then, is that the Internet is here to stay, it is getting more important all the time, and is likely to get much more important in the future. The two products that we will discuss next will let you hop on board, creating surveys that can go out on the World Wide Web in style.

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change them to anything else. Using these letters can help with data entry (you can punch these in quickly), but it's a shame they can't be varied. We have some long-standing evidence that using the letters "A" through "F" to label questions can introduce bias in responses.

Also, this makes it problematic to run surveys on both the Web and on PCs and have them remain truly compatible. If the surveys do not look the same in both versions, we can't promise that responses from both will be strictly comparable. In any event, a little more flexibility in labeling the various buttons, and in setting up scales, would only be welcome.

Still, you will find that the program offers you many options in its preset forms. If you can live with the program's small inconsistencies, you should be able to find something that gets close to what you need in any particular question. (For instance, in the question type shown in Figure 3, you can have anywhere from one to 24 answers — although it would seem you need not have the option of selecting one choice if only one is possible.)

Survey Said cannot do calculations and feed sums from your earlier answers back to you. You can use detailed skip patterns to guide respondents to different questions depending on their answers, though. Figure 4 shows you the window in which you can edit skip patterns. Note that you can select a different question as the point for skipping for each possible answer.

In one moderately confusing aspect of the program, you only can get to this window if, under the main "File"

menu, you select "Open survey" rather than "Open library." It would be much simpler if the menu said something like "Edit skip patterns" to direct you toward the window where you can do this. As shown in Figure 4, you can see and edit all the skips in one place, making it simple to check the logic of the survey.

From Question	From Answer	To Question
1 - StillOwnAuto	If Not Answered Skip to →	1 - StillOwnAuto
2 - ServiceAdvDealer	Completely Satisfied	2 - ServiceAdvDealer
3 - ServiceAdvisorPoliteness	Very Satisfied	3 - ServiceAdvisorPoliteness
4 - OrderPromptness	Fairly Well Satisfied	4 - OrderPromptness
5 - OverallSrvAdv	Somewhat Dissatisfied	5 - OverallSrvAdv
6 - Repeat work	Very Dissatisfied	6 - Repeat work
7 - WhyReturnVisit		7 - WhyReturnVisit
8 - NatureOfRepeat		8 - NatureOfRepeat
9 - MaintainService		9 - MaintainService
10 - MinorService		10 - MinorService
11 - MajorService		11 - MajorService
12 - BodyWorkSrv		12 - BodyWorkSrv
13 - RecommendSalesperson		13 - RecommendSalesperson
14 - RecommendDealership		14 - RecommendDealership
15 - RecommendAutomobile		15 - RecommendAutomobile
16 - OverallDealership		16 - OverallDealership
17 - OverallAutomobile		17 - OverallAutomobile
18 - BuyFromDLRagain		18 - BuyFromDLRagain
19 - BuyClassicAgain		19 - BuyClassicAgain
20 - ContactYou		20 - ContactYou
21 - FollowUpInfo		21 - FollowUpInfo
22 - AreasOfConcern		22 - AreasOfConcern
23 - MilesOnAuto		23 - MilesOnAuto
24 - Gender		24 - Gender
25 - Customer's Age		25 - Customer's Age

Exit

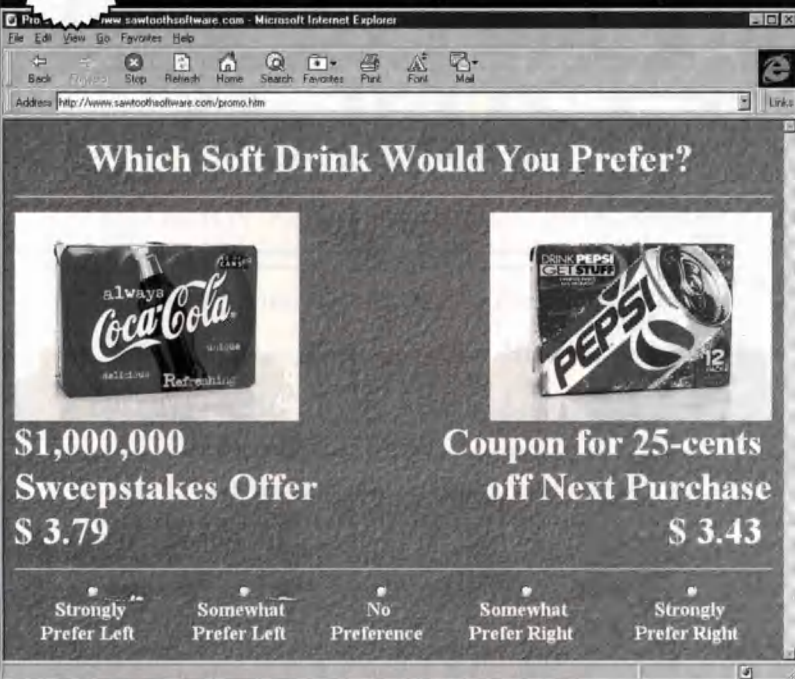
Reset Current Question Reset All Questions

Figure 4: Survey Said Window for Editing Skip Patterns

More about HTML

Here we need still more explanation of HTML. Once the survey gets created, you will need to translate it into HTML format to run it as a well-presented document that behaves itself on the Web. As things now stand, you get precisely one version of the HTML-format survey, and all the ques-

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tions must appear on it. Skip patterns in the computer-based survey become instructions in the HTML form. At the risk of running far too long an example, we have included below a few sample questions that worked nicely with skip patterns on the PC transformed into HTML format.

By the way, to see the survey in this form, you can just call it up from your hard disk in your Web browser, such as MS Internet Explorer or Netscape Navigator. The excerpt below looks much like a part of the Web survey. We pasted it with no trouble into this document, in the word processing program, going directly from the Web browser window.

Survey Said added all the skipping instructions you see, but you will notice that this just is not the same as having the question disappear when the respondent does not need it.

As you can see, certain types of skipping and branching that we more or less take for granted with other survey forms are much more of a problem here. Putting in some forms of question control that are easy to administer elsewhere — such as rotating questions, or having some respondents skip certain blocks of questions — seem really difficult on the Web. With Survey Said, you would need

erate a page using the latest Java tools, which means that you can have the type of control you want. Unfortunately, as we mentioned earlier, Java applets are so new that today's Web browsers may not run them properly. We will need to wait, to see if Java becomes the truly standard language that it needs to become, if we are to use it with Web interviewing.

Survey Said today: the program runs everything from one file

Survey Said has a special method for creating a ".cgi script" that will work with all its different formats. Again, the versions may not match 100 percent, but at least, once you get the survey working, it will work on the Internet, on a PC and with disk-by-mail. So you do not need to rewrite the survey several times to get it to run in several places.

The program uses a nice system on your Web site, with which it routes the answers to the correct survey. You can have as many surveys running as you want, and the program will simply pull out the answers from each and send them to the correct data file. It has several built-in security features as well. These prevent amateur hackers from mak-

1. Just how much do you really love the new product? Use any number from 0 (I hate it and I'm crazy) to 10 (I'm as sane as they come and I love it) <u>(If Not Answered, Skip to Question 4.)</u>
<input type="radio"/> 0 <u>(Skip to Question 3.)</u>
<input type="radio"/> 1 <u>(Skip to Question 3.)</u>
<input type="radio"/> 2 <u>(Skip to Question 3.)</u>
<input type="radio"/> 3 <u>(Skip to Question 3.)</u>
<input type="radio"/> 4 <u>(Skip to Question 3.)</u>
<input type="radio"/> 5 <u>(Skip to Question 3.)</u>
<input type="radio"/> 6 <u>(Skip to Question 3.)</u>
<input type="radio"/> 7 <u>(Skip to Question 3.)</u>
<input type="radio"/> 8 <u>(Skip to Question 3.)</u>
<input type="radio"/> 9 <u>(Skip to Question 3.)</u>
<input type="radio"/> 10 <u>(Skip to Question 3.)</u>
2. Why do you love this product so much? <u>(If Not Answered, Skip to Question 4.)</u>
<input type="radio"/> I know what's really good <u>(Skip to Question 4.)</u>
<input type="radio"/> I, along with you, know what's really good <u>(Skip to Question 4.)</u>
<input type="radio"/> Also, other people know what's good <u>(Skip to Question 4.)</u>
<input type="radio"/> I don't answer questions like this without a fee <u>(Skip to Question 4.)</u>
<input type="radio"/> Who are you and why do you need to know? <u>(Skip to Question 4.)</u>
3. Why not, you miserable skeptic? <u>(If Not Answered, Skip to Question 4.)</u>
<input type="radio"/> Are you talking to me?
<input type="radio"/> I could tell you but you wouldn't understand
<input type="radio"/> Come to think of it, nobody really understands me
<input type="radio"/> Really, I have always been misunderstood
<input type="radio"/> Mommy told me not to talk to strangers
4. Anyway, what's your mother's favorite color? <input type="text"/>

to create several versions of the survey, by hand, and then reassemble the answers from them later. This seems like the type of work the software could do, but this is not the case yet. And there seems to be nothing you can do to whisk respondents by questions they do not need to see. In some ways, in spite of the slick graphics you find on the Web, we are still roughing it there, after all.

Perhaps at some time in the not-too-distant future, Java applets will solve our problems here. Survey Said can gen-

ing system accept anything but approved answers to the survey, and prevent any damage to the main survey-collection file.

You can customize the messages that Survey Said will send back to respondents when they complete surveys, as well. If you have several surveys going at once, you can have a message of receipt or a "thank-you" specific to each.

If we have not said so, the PC version is a full-scaled program in its own right, not a simple add-on. It has many fine

features of its own. Among them, it stores the survey compactly so that you can have up to 300 questions on a single floppy disk — far more than even the most tolerant respondent will suffer. You also can set the program to accept one respondent or multiple respondents (up to 200, depending on the survey's length) on a single diskette. This could simplify sending the diskettes out to a field service. Finally, the program does not need to install anything on the PC to run the survey. Everything you need comes right on the survey diskette—and stays there.

Survey Said comes in three versions with different limits: the two lighter versions cost a few hundred dollars less and are limited to 400 and 700 responses each. It is really worth spending the extra money to get the full version, though, as this will allow you to collect as much data as you want for not too much more expense (it costs \$1,000).

The program should run with nearly any type of Web-server (that is, the computer that runs the Web site). If you are running the site from Windows, you get the needed executable files with the program. If you are running the site from UNIX (as many do), Marketing Masters provides the source code so that you can compile it to run under whatever flavor of UNIX you have. (UNIX is somewhat picky about how a program's code gets compiled, each version wanting its own compilation.) If you have a Web master, setting up SurveySaid on your site should be a simple task for her or him. If you are new to the Web, and are doing it yourself, just take a few deep breaths, and follow the

instructions. You will find them clear and thorough.

Some small rough edges

Survey Said looks a little less slick than either Sensus or Decisive (coming up in the next section), but don't let this appearance fool you. Survey Said is remarkably versatile and does its job. We have some complaints about it, but only a few. For instance, installation leaves a little to be desired. The program automatically creates its own Windows "group." (In Windows 95, this appears as another entry in the main "Programs" menu — the one that you get by clicking the "Start" button). Most programs now have slightly better manners, and ask you if you want to create a new group, or install the program in one you already have.

Also, we found a slight "hole" in Survey Said's PC-based questionnaire versions. If you allow respondents the option of reviewing their answers (which you can deny them by simply changing one check-box in the survey set-up), then they can back up and answer questions that they were supposed to skip also. We're not too sure what this does to the data file, but clearly if a question is supposed to be off limits, it should be off limits.

Since the Web version relies on one long HTML page, all the questions sit out there in view, whether respondents need to answer them, or not. Maybe once the Web gets faster, answering a question in a certain way could send you, via a special link, to an entirely different page with the appropriate question. But for now, one big page seems like

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the only way we can go.

Otherwise, we have a "wish list" for, rather than gripes about, Survey Said. One salient omission is its lack of a spelling checker. You can export the questions to another file and read them into MS Word or some other application, but this takes more time and effort than it should. It seems to us that any package that generates self-administered questionnaires (that your critical public will view) should have a spell checker as a standard feature. Anyhow, if a program that you can find for about \$39, like Micrografx Windows Draw, can have a spell checker, it can't be that tough to add one. We hope the point is taken.

We would like to see the program become more flexible in the ways it displays choices on the PC screens, and we would like it to become more sophisticated in its use of branching and skip patterns there. Even if this option must remain limited on the Web, and rotation means building several alternative versions, we would like to see these capabilities taken further.

For the PC version, it would be helpful if it could pick up earlier responses, and incorporate them into later questions, as Sensus can do. Also, when you run Web surveys and PC surveys, they should look as similar as possible. At the very least, the program could do without the extraneous letters that appear with choices on the PC version. Finally, we also would like to see a section of the manual devoted to tips on making HTML surveys into "multimedia" documents.

Survey Said overall

If you have straightforward surveys to do on the Web, Survey Said should provide you with all the horsepower you ever will need. It is a versatile program, and even allows you to send out the same survey in several forms — on the Internet, using disk-by-mail, and even on paper. You have to accept some small differences in format from the PC to the Web, but versions at least will look good. If its capabilities meet your needs, you should find a lot in this program to please you. We found it easy to use, and fast in creating surveys that will work on the Web. Its data collection facilities allow you to get several (or many) surveys up and running on one Web site. At its price of about \$1,000, the "full" version (which handles as many responses as you

want) is a great bargain for real "leading edge" technology.

Decisive Survey

Decisive Survey offers truly industrial-strength software packages. Their larger version, Decision Source (which we will not discuss here), can process unlimited numbers of surveys, requires a dedicated Web server, and commands a high price. This is software used by enormous organizations, like America Online, that sometimes need to gather millions of responses from their customers. (Although, come to think of it, neither of us has ever been among the millions who must have gotten an America Online survey, either. Just a random observation, here.)

We will discuss Decisive's "smaller" size, the 10,000 respondent edition, here.

Decisive has some ambitious goals for its product, seeing as part of a "real-time information" system, which can provide ongoing "feedback" from customers to manufacturers or service providers, or from employees of large organizations to their managers.

Decisive Survey seems well suited to these types of tasks. However, it does not give you the variety of question types that you will find in either Sensus or Survey Said. As Figure 5 shows, you can choose among four basic styles of questions:

- Choose one
- Choose all that apply
- Rating
- Enter text

Decisive Survey does not allow for scaled responses, except as simple text. It does not do rankings, point allocation, or sliding-scale questions. It allows you to skip to other questions, but does not provide any more advanced forms of branching in the questionnaire. Again, recall that the Web (for the moment) does not fully support many



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Figure 5: The Decisive Survey Main Program Screen

fancier question formats, which will need to wait for widespread adoptions of Java applets to run intelligently.

If you find its range of capabilities meet your needs, you should like Decisive Survey. The program is polished and well thought-out, with a nicely integrated "interface" or appearance. Figure 5 shows you that the layout is compact and intelligent, with everything readily accessible from well-organized menus.

Decisive Survey, unlike Survey Said, gets its responses back in the form of e-mail. Each survey comes into a designated e-mail address on your Web site, rather than into a dedicated file. Because it uses this transmission method, you can easily put Decisive onto an employee e-mail system. Decisive may well be your product of choice if you intend mainly to send out surveys via e-mail.

Like the other products, Decisive can gather the responses for you and do some basic data processing. It knows enough to ignore answers given to Web survey questions that respondents should skip (Survey Said is still working on getting this feature into their package). If you have a Web master, you should find it simple to get Decisive up and running. Otherwise, the manual is clear, well-laid out, and helpful. Decisive, like the others, does some summary statistics, but not nearly as much as a dedicated data analysis package, such as SPSS or SAS. Also like the others, it will export data to these packages, but only as a plain text (or ASCII) file. Unfortunately, also

like Survey Said, Decisive lacks a spelling checker.

Decisive in brief

Decisive obviously has the capacity to handle as many surveys as you can throw in its direction. It has a very impressive client list, having met the survey needs of organizations with millions of customers, such as America Online. The program is well-organized and has proven under fire that it will do what it sets out to do. You will need to restrict yourself to four basic types of questions with Decisive Survey. Also, it will not catch your spelling errors automatically. If you do not mind these limitations, you should find that it performs well. Since it relies on e-mail as its basic data collection method, you may find it the best choice if you do mostly e-mail-based surveys. The 10,000 respondent version costs \$2,400.

A final comment: talking to and sharing with other programs

Part of the great promise Windows has always had (or is that a promise it has always made?) is that Windows programs would share data with each other. An ideal Windows (software) inhabitant should be able to give over whatever it is working on to another program, whenever needed. Unfortunately, programs that have anything to do with writing surveys typically have stayed well behind the curve in this area. Even very expensive pack-

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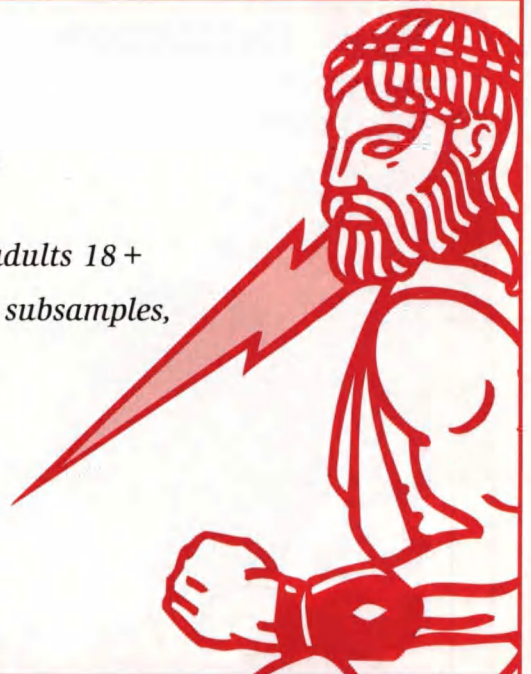
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ages, like CfMC for tabulations, only recently have managed to produce files in anything but their proprietary file formats or plain text (ASCII) files.

It is a real waste when programs which allow you to create questionnaires — and so have questions with numbers and labels already on them — but can export questionnaire data files only as plain, unlabelled text. Yet you and I know — and we would hope the makers of these programs would, too — that somebody, somewhere might want to analyze the data more completely than their programs allow. Then perhaps, the manufacturers could make the leap, and allow you to export data in a form where it has labels. You might even wish that they would learn how to export files to SPSS and SAS, the two big noises in statistical software. (If the program could export the labels, then you would not have to put them in all over again to do any other analyses.)

But usually this seems like wishing for too much. Information that you painstakingly enter for most ques-

tionnaire-related programs is lost for all others. Perhaps this is part of the hubris that seems to crop up in the software business — where some manufacturers start believing that their products ought to serve as the one-stop solution for all needs. Maybe the makers get exhausted just cooking up their own list of special features. Whatever the case, we earnestly wish that the manufacturers would see the error of their ways, and start to make the software do the real work in exporting files, rather than leaving this to us poor users.

Apropos to this, the head of a large software development team once remarked to one of us (Struhl): "What? You actually expect it to do what you want? Don't you know it's only software?" End of complaint, and we hope that the point is taken — at least by someone, somewhere.

Summary

These programs may, indeed, be only software, but they show a great deal of intelligence and many good features. Sensus Multimedia will give

you an outstanding solution if you need to do advanced PC-based interviewing. It is flexible, can do complicated skip patterns and logic, and remembers what respondents said for use in later questions. It can sum responses, multiply them, and even exponentiate, or do math involving parenthetical statements — which is more than most respondents can do. You may have to do a little fiddling to get things just right, and you will want to watch for some rough spots in the installation and in how it uses the Windows screen display. Overall, Sensus Multimedia is the best PC-based interviewing package we have seen.

Survey Said is the leader in versatility, and the most reasonably-priced of the programs. You can use it to interview on the Web, on PCs, using disk by mail, and even to create scannable forms. Although it shows a little inflexibility in question formats, it provides a wide range of question types. It does not have all the sophisticated features you will find in Sensus, but then some of this seems inherent in the Web itself. And Survey Said lets you put your survey up on the Internet, which Sensus cannot.

Decisive Survey is probably the program to choose if you will be collecting millions of responses — but in that case you will want Decision Source, the larger, more expensive version. This program only offers four basic types of questions, but it is nicely made, and intelligently designed. It uses e-mail as its basic method for returning surveys, and it seems particularly well suited for surveys sent out in this form. If you primarily do surveys by e-mail, and need to go out on to the Web at other times, this may be the software package of choice for you. □

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Survey Monitor

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those who track stocks on-line, and net-connected home banking customers.

Only 39 percent of low-income optimists currently own PCs. However, this moderate penetration hides a burgeoning enthusiasm. When asked about their interest in computers, eight out of 10 prospective buyers surveyed by Forrester in these segments rank near the top of the scale. Enthusiasm combined with falling PC prices and strong demand for applications like home budgeting, educational software and the Internet will drive penetration to 49 percent. Held back economically from PC ownership, African-Americans and Hispanics in this segment are 50 percent more likely to buy a first PC than their white counterparts.

"As consumers move on-line, mass marketers must develop strategies that intercept this audience as it does," says Bernoff. "Mainstream consumers will concentrate their early on-line activities on research. Consumer electronics, real estate, and home improvement sites should deploy deep informational sites to meet this need. Banks, grocery stores, and discount retailers need to invest in a simple user interface and scale economies to satisfy less-sophisticated, price-sensitive customers."

The report also finds that as PC ownership moves down-market, vendors must prepare for a new, broader audience. Ads that promote whizzy computing features will leave first-time, low-income buyers cold. "Low-cost PC makers like Packard-Bell should build on their bargain-minded base with messages about ease-of-use and joining the PC revolution," says Bernoff. "Computer, software, and on-line vendors can tap into Hispanic and African-American PC aspirations with multi-cultural media buys."

However, the survey found some

obstacles to continuing e-commerce growth. The Report found that the 5 percent of North Americans who buy and trade securities on-line generally share high incomes, optimism toward technology, and relative comfort with on-line security. These e-commerce participants have been on-line for two years and log on to the Web daily. Currently, on-line buyers rate security as only adequate; those yet to buy rate it as poor. The survey shows that even among Internet transactors, only 26 percent believe Internet security is excellent. Almost half of all prospective purchasers surveyed by Forrester cite credit card fear as obstacles to future purchases.

"Consumer perceptions are absolutely inhibiting the growth of e-commerce," says Bernoff. "Think about the messages they're getting: Every time anything is submitted in Netscape, a warning about an unsecure network pops up, riling all but the most savvy Internet users. IBM has a TV ad about server security that would frighten anyone. The first marketing campaign to step up to the plate to promote the Internet as a secure environment to do business will be a clear-cut winner." For more information call 617-497-7090 or visit the company's Web site at

www.forrester.com.

On-line advertising gains momentum

Binary Compass Enterprises (BCE), a Los Angeles research company specializing in the study of customer satisfaction data on the Web, has released data from its Fourth Quarter 1997 Internet Shopping Report. BCE gathers and analyzes shopper data from customers of Web merchants around the Web. BCE publishes a portion of the data it gathers in its on-line shopping resource, the BizRate Guide (www.bizrate.com).

The study reports, among other findings, that on-line advertising is gaining worth for driving traffic to e-merchants.

Although on-line ads are still not as effective as browsing referrals in directing people to shopping sites, the gap is closing. BCE's first Internet Shopping Report published in May 1997 indicated that 12 percent of surveyed shoppers were directed to a site through on-line advertisements, while browsing referrals accounted for the remaining 88 percent. In the current study, the discrepancy between the two referral types decreased, resulting in a split of 26 percent vs. 74 percent.

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It was found that direct marketing efforts, including catalogs, direct mail and e-mail, were most effective in referring potential customers to a site: 15.7 percent of shoppers surveyed learned of merchant sites through direct marketing, spending an average of \$213 per transaction at these sites. Yahoo! came in as the second-most popular referral source, with 14.4 percent of the shoppers and an average of \$109, followed by AOL at 9.9 percent and \$74.

In addition to referrals, BCE's study also looked at the factors affecting the purchasing behavior of consumers. According to the report, 94 percent of shoppers who received their orders on time stated that they were either "very likely" or "likely" to buy again from the same merchant, while only 50 percent of those who received late orders gave the same response. Combined with the finding that the average purchase

amount for a repeat customer is \$208 versus \$109 for first-time shoppers, this fact becomes particularly significant for retailers doing business on the Web.

In assessing the merchant attributes that were most important to Web shoppers in determining which sites to purchase from, the study found product availability, product selection, on-time delivery and price to be the most important respectively. "Contrary to what most retailers believe, price is not the most important factor in attracting shoppers. Rather, success hinges upon a merchant's ability to excel along several dimensions of customer service," says David Lau, vice president of market research for BCE.

Another aspect of Internet shopping that the BCE reports have analyzed in depth has been the demographics of today's Internet shopper. A surprising finding that has remained virtually unchanged in all of the reports is the fact that men still comprise the vast majority of the on-line shopping population (76 percent), despite reports that the percentage of women on the Internet has been steadily increasing. One trend that the study did find, however, is the rising popularity of Internet

shopping among those earning less than \$50,000. Fifty-four percent of the respondents in this study fell under this income bracket, as opposed to only 37 percent in BCE's first study. "Although the Internet shopping population still represents a limited demographic, with the typical shopper being a Caucasian male earning an annual income of \$65K, the introduction of low cost PCs is sure to increase the penetration of computers in U.S. households, and as a result the on-line shopping population will diversify fairly quickly over the next few years," says Lau.

The Internet Shopping Report is based on 32,826 shopper surveys gathered during the three month period from October to December 1997 from customers at 64 on-line retailers including CDNow, CUC International, 1-800-Flowers, Garden Escape, GolfWeb, Powell's Books, Insight, eToys, Virtual Vineyards, CDW, Music Boulevard, Crutchfield Corporation, and more. These merchants offer a range of retail products including food and drink, computer software and hardware, home and garden supplies, sporting goods, books, music and entertainment, and consumer electronics. The surveys were conducted at the point-of-purchase on the Web, with a follow-up survey sent via e-mail after the expected date of delivery.

An abbreviated copy of the Internet Shopping Report which features general shopper statistics and findings of the study is available for \$495. The full report, available immediately at an introductory price of \$1,495, runs over 430 pages in length and contains more than 350 tables and graphs. This study provides descriptive statistics, crosstabulations and analyses of shopper demographics, transactional data, advertising referral data, performance and importance rankings of 10 dimensions of service on the Web. For more information call David Lau at 310-202-5311 or visit the company's Web site at www.bina.com

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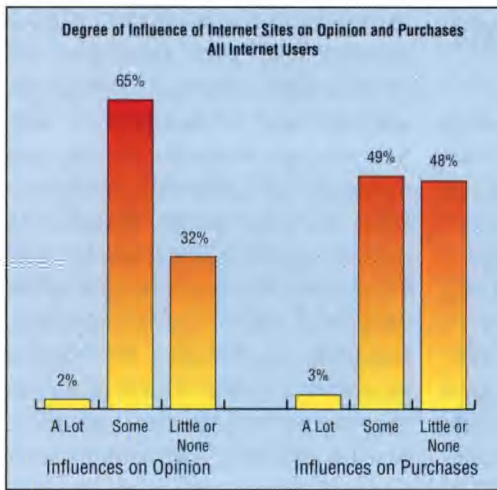
Internet users question security

A study by New York-based CDB Research & Consulting found that about half of Internet users think information posted on the Internet is unreliable. Generation Xers have the least confidence in such information, while better-educated, affluent and employed consumers are most likely to trust information viewed on-line. In addition to concerns about the reliability of information posted on-line, Internet users say the security of electronically transmitted information is



problematic as well. Of 400 people polled, 52 percent say that buying products on-line with a credit card is unsafe. "The implication is clear," says Larry Chiagouris, managing director of CDB Research & Consulting Inc. "Many on-line vendors are not winning customers from traditional retail outlets that guarantee security and privacy during business transactions. Consumers have fundamental concerns about the security of personal information transmitted over the Internet that many companies have yet to adequately address."

Despite the amount of product information available to consumers who go on-line everyday, information viewed on-line has had little effect on Internet users' buying practices. "With a few exceptions, such as Amazon.com, on-line information has



more impact on consumer opinion than actual purchases," Chiagouris says. "Shoppers use the Internet to access product information, but they frequently wait to make purchases at more traditional retail outlets. For more information call 212-367-6858.

On-line banking - demand exceeds supply

On-line consumers want more from their banks. There is a growing demand from customers who are interested in locating mortgages, auto

loans and investments on the Internet. People are hungry for quality information and Internet services which will assist them in managing their personal finances, according to Ken Wanek, president of RateNet, a new Web site (www.rate.net) that monitors and ranks deposit and lending rates for over 11,000 institutions nationwide. "Thirty-five percent of banks and credit unions have Web sites and only one in 10 of these offer on-line banking," Wanek says.

In a survey of RateNet customers, the number one reason consumers were searching the net for a new bank is that their current institution lacked convenient services such as on-line banking. "RateNet's visitors were not leaving for better rates," Wanek says, "they were simply looking for on-line institutions with at least competitive rates."

Considering current technology, the availability of financial alternatives on the Internet and the low cost of on-line services, Wanek believes financial institutions who do not participate in on-line banking are putting their futures at risk. For more information call Ken Wanek at 414-223-2300, ext. 3037 or visit the company's Web site at www.rate.net.

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Product & Service Update

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comprehensive reference on how to find information on the Internet. The 60-page guide is entitled, "Search Tutorial: Guide to Effective Searching of the Internet." Search engines are essential starting points to finding needles in the Internet's 300 million document haystack. But, on average, users only issue 1.5 keywords per query and have little knowledge of effective query construction or how Internet search services operate. The inability to find desired information is cited by three-quarters of all Internet users as one of their biggest frustrations. The guide is generic to all major search services such as Yahoo!, Excite, Infoseek, AltaVista, Lycos, HotBot and WebCrawler. The guide is available from its Web site at: <http://thewebtools.com/searchgoodies/tutorial.htm>. It may also be downloaded from the site in Microsoft Word 6.0 and Adobe Acrobat formats.

Consumer Guide from Scarborough

Scarborough Research, New York,

has released its Consumer Guide for the full year 1997 release of the Scarborough Report. The two-disk software tool is designed to help Scarborough subscribers find the thousands of consumer, media and retail analysis options available in the company's 60 local market surveys. Users can search by nine major categories (auto, travel, banking, financial, healthcare, TV, cable, product and retail). Within each category are as many as 1,600 products, services or stores. For more information call Gary Seidner at 212-789-3560.

New capabilities from Surveycraft

scyWeb, a Web interviewing module from Australia-based Surveycraft Systems, now supports all Asian languages. In addition, Surveycraft Systems has released an Asian language compatible version of scyField-HPC, CAPI software for hand-held PCs. ScyField-HPC is designed to run complex CAPI surveys on affordable hardware, with features to automate question routing, randomization, arithmetic and sliding bar scales. ScyField-HPC can share questionnaires and data with

Surveycraft's software for paper data entry, CATI, multimedia CAPI, Web interviewing and analysis.

In addition, it is now possible to update a scyWeb questionnaire while it is in use. Previously, users had to shut down scyWeb in order to update the questionnaire. This feature enables scyWeb to use the old version of the questionnaire to complete interviews that were commenced prior to the update, while all subsequent respondents will be presented with the updated version. For more information visit the Surveycraft Web site at www.surveycraft.com or contact Andrew Jeavons at sc-usa@surveycraft.com or at 513-871-2580.

Three new products from Pulse Train

U.K.-based Pulse Train Technology has released STAR for Windows, a batch tabulation package for PCs. Designed as a set of software modules for tabulation, the package includes a Windows version of Pulse Train's existing product STAR and additional modules for editing, viewing and printing tables, editing card data and designing specs for tabulation. Tables can be exported directly into HTML format so they can be posted on the Web. They can also be exported into .WMF format, for use in reports using Microsoft products such as Word and Powerpoint.

The company also released a new version of its questionnaire and forms processing package, Bellview SCAN. Version 2.0 is completely scalable, allowing anything from a single user station to a networked system of scanners and work stations. The package includes a workflow system which takes care of each stage of questionnaire processing. Users are free to use any combination of modules which include scanning, editing, verifying and coding. A keying module is also included to allow data entry of damaged or unscannable questionnaire pages. Data is produced in flat ASCII format or in an ODBC compatible database such as



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In addition, the company introduced Bellview WEB, a software package for conducting surveys on the World Wide Web, including Web site questionnaires, consumer panels and other types of research. Based on the company's existing CAPI and CATI software, Bellview WEB includes all standard computer-aided interviewing features such as routing, masking and substitution of text. Multimedia elements can also be included. For more information call Hank Copeland at 561-842-4000 or visit the company's Web site at <http://www.ws.pipex.com/ptt>.

New classification tree software

Salford Systems, a San Diego developer of data mining software, has introduced CART classification-and-regression tree software. CART uses historical data to discover patterns, trends and relationships. For experienced data analysts, CART provides: multiple automatic self-validation procedures; adjustable misclassification penalties; intelligent surrogates for missing values; eight choices for tree-growing criteria; multiple-tree, committee-of-expert methods, or bootstrap aggregation; and a complete programming language with flow control for on-the-fly data manipulation. The product supports a variety of desktop stand-alone and client/server operating environments, including Windows 3.x, Windows 95, Windows NT, Macintosh, UNIX, IBM MVS and CMS. For more information call 619-543-8880 or visit the company's Web site at www.salford-systems.com.

LEXIS-NEXIS offers access to govt. data

Statistical Universe, a new Web product from LEXIS-NEXIS provides access to U.S. federal, state and organizational statistics. Abstracts link directly to individual tables, figures and charts. Searches may be

done by subject, by title, by agency or for comparative data. The foundation of Statistical Universe is three reference databases from Congressional Information Service, Inc., — American Statistics Index (ASI), Statistical Reference Index (SRI), and Index to International Statistics (IIS). (ASI and SRI are available now, IIS will be available in August.) For more information call 800-227-4908, e-mail newsales@lexis-nexis.com, or visit the company's Web site at www.lexis-nexis.com/business.

Site offers free job postings

The JobMarket, an on-line global employment service at www.thejobmarket.com, is now offering companies the ability to place unlimited classified postings for free on its site. Visitors to the site can take advantage of a full line of job-seeking and recruitment tools aimed at putting qualified candidates in touch with potential employers. There is no limit on the ad's length. Companies can include a general overview of their products and services, a detailed searchable description of specific candidate skill requirements for each position listed, and an in-depth description of job benefits and corpo-

rate culture. In addition to a mailing address, companies can include their e-mail address in the classified job postings whereby candidates can immediately respond to the advertised positions while on-line or request additional information from the corporate representative. Finally, The JobMarket classified postings are searchable by the job seeker using set criteria including industry, title, description, requirements, and location, thereby providing prospective candidates with the ability to immediately locate only those advertised positions that meet their needs and desires. For more information call Marc Hatton at 305-663-3563 or send an e-mail to info@thejobmarket.com.

SPSS upgrades SYSTAT

SPSS Inc., Chicago, has released SYSTAT 8.0. New features to the statistics and graphing software include additional spatial statistics, a revamped interface, an Output Organizer which navigates complicated analyses by automatically scrolling to any analysis or graph with one mouse click, a Data Editor, and 32-bit architecture. For more information call 312-329-2400 or visit the company's Web site at www.spss.com.

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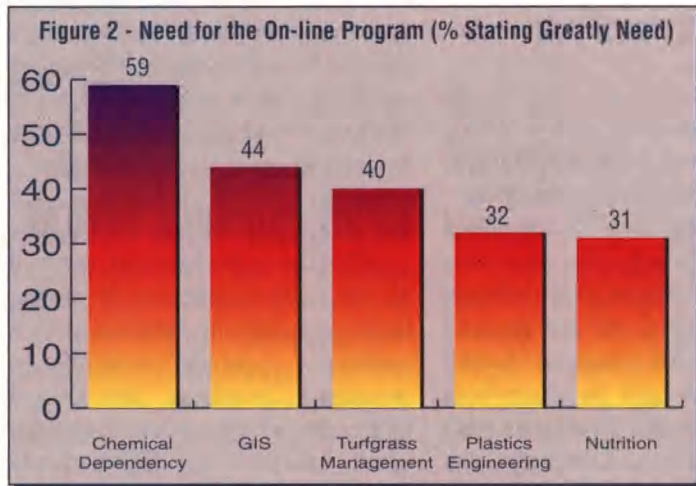
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Penn State

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learner at Penn State would take correspondence courses via textbook, audio or videotape, CD-ROM, or videoconferencing.

Telephone surveys were conducted with students completing an independent learning certificate program. While e-mail survey software is now readily available, few quality packages were available in early 1997, therefore, listserv surveys were used. These elec-



tronic questionnaires were posted on a listserv (an e-mail list centered around an interest or field), inviting students who were already taking courses with Penn State through the Internet on a pilot basis to take a survey about education via the Internet.

In late 1997, an e-mail survey using a package designed by Decisive Software was issued to recent inquirers to Penn State's independent learning program. Of the 1,403 inquirers who gave e-mail addresses, 297 returned the survey. A significant percentage of non-responses were a result of incorrect or expired e-mail addresses, or lack of interest.

These electronic and telephone surveys provided information on why students chose an independent learning mode of study, why they chose Penn State, whether they had access to technology, and did they or their employers have ability to pay for continued education. In addition to their desire to continue their education, independent learners often were seeking convenience of study (82 percent), a Penn

State education (53 percent), and had access to technology (85 percent) and received some sort of reimbursement from their employers (43 percent).

As shown in Figure 1, Phase V consisted of major marketing research activity on the nine programs selected by academic deans of Penn State. Specifically, three major questions needed to be answered through marketing research.

1. What is the institution's reputation? Internal assessments, secondary research, Internet searches, rankings by national media, and interviews with other universities and associations, showed that Penn State rates high in the fields of engineering, agriculture, health care, business and science.

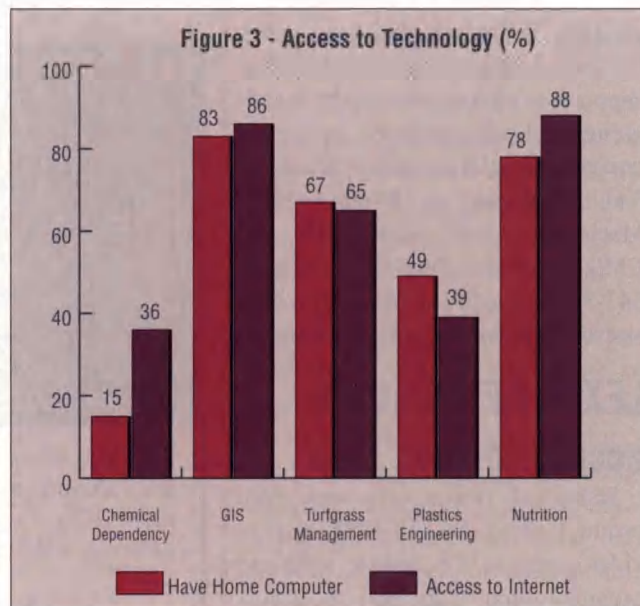
Therefore, in terms of World Campus and the university's traditional strengths, Penn State would look strongly at offering turfgrass management, GIS, and engineering via the World Campus. Penn State would most likely encounter lower levels of competition and higher levels of awareness on these programs (Figure 1, Phase III).

One method Penn State staff used to measure reputation was to ask the faculty of a department proposing a World Campus program what other schools or institutions offered similar programs. Staff from Penn State's Office of Marketing Research (OMR)

then interviewed these organizations to ask them who they thought their competition was. If Penn State was named by these organizations, then these findings, as well as data from other sources, was used to measure reputation and levels of competition.

2. How ready are faculty, the departments, or those providing the instruction? World Campus leaders quickly learned that delivering education through the Internet was new to most faculty. Many had perceptions that on-line instruction would be text-heavy and have limited graphics or interactive capabilities. Many did not realize that the delivery environment had multimedia capability, allowed for group projects, and used a lot of e-mail interaction.

In-depth personal interviews with faculty quickly revealed that faculty from turfgrass management and a number of engineering courses would be most ready, while those in the material sciences and nutrition would be least ready. Staff from OMR and Penn State's Distance Education Department interviewed faculty to discuss departmental readiness, commitment to the program, whether the course content was prepared, whether the course was delivered through other modes of distance education, and how likely would the proposed program enhance or meet the strategic goals of



the academic college.

3. What are the conditions of the

population? Serious consideration was made regarding the size and demand of the market, whether marketing can reach them, but more importantly, whether they have access to technology and the ability to pay. Surveys of each population yielded data suggesting that Penn State turfgrass management, engineering, GIS, and chemical dependency counseling programs would be most successful. Approximately 100 surveys were conducted with professionals in each of the fields. They were asked whether other professionals in their industry would be interested in or need the proposed program. While access to technology was low for those in the chemical dependency counseling profession (Figure 2), interest and need in this program was highest among the five programs studied.

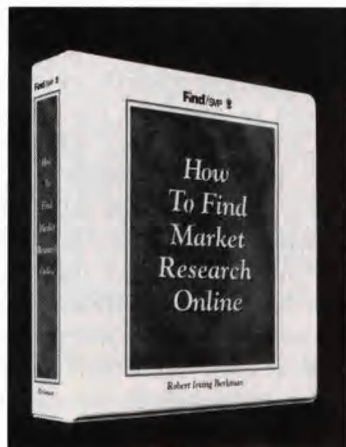
Surveys also revealed that, although potential demand would be highest for chemical dependency counseling, technical readiness would be a concern (Figure 3). Representatives from each industry surveyed were asked whether they or employees who might benefit



from the proposed program had access to computers at work or at home or had access to the Internet. Plastics engineering showed low demand and the potential audience also had low access to technology, thus making it less attractive. Both GIS and nutrition professionals had high levels of access to computers and the Internet.

Although access to technology was lowest for those interested in chemical dependency counseling, demand for counselors was expected to double by 2005, thus making the true market size slightly more attractive. In addition, it was expected that lower priced computers would play a large part in the adoption of technology for this population at a later date.

Other critical factors were the ability to pay and the willingness of employers to reimburse its employees. Figure 4 shows that reimbursement possibilities were highest for those in the plastics, nutrition, and GIS professions. These professions typically have a larger number of employees compared to chemical dependency clinics or golf courses.



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The chemical dependency industry, given major changes in health care policy and governance, had lower levels of employee reimbursement for education. Counseling organizations also varied greatly in size, ranging from independent counseling organizations to large regional treatment facilities.

In-depth interviews

Other data were collected including demographic profiles of Internet users, industry outlooks, and interviews with major associations. In-depth interviews were conducted with associations in the chemical dependency counseling, GIS, engineering, and turfgrass fields. Strong partnership potential with associations or major corporations also contributed to support of a program. For example, the Golf Course Superintendents Association of America was interviewed and later partnered with Penn State to deliver

courses to their members.

Using many data sources, final recommendations were made to launch certificate programs in turfgrass management, chemical dependency counseling, and noise control engineering

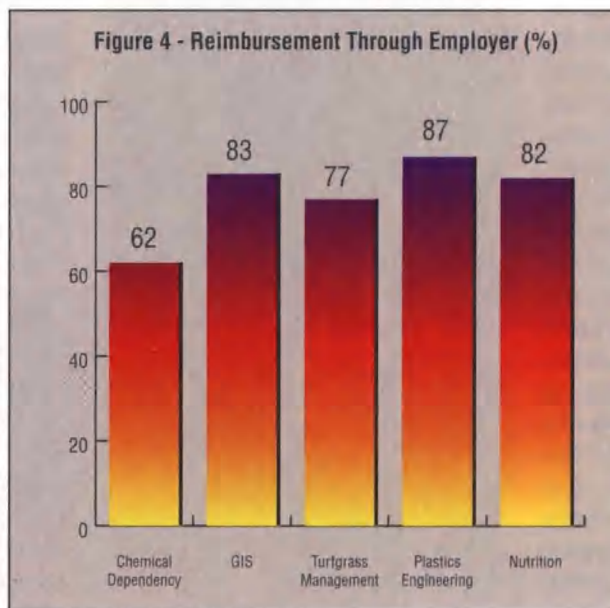
conducted to support the addition of noise control engineering to the spring offering. In total, 37 students registered and were accepted out of the 73 who applied to these three programs. Since the first three programs

were offered, Penn State has received over 1,000 World Campus inquiries from 46 states, two territories, and 26 nations on six continents.

In the fall of 1998, a masters degree in reliability engineering will be offered, as well as a certificate in GIS. Programs such as anesthesia and child care were moved farther down the consideration list due to a number of factors (willingness and ability to pay).

Other courses added to the 1998/1999 schedule include business logistics, fundamentals of engineering, and nutrition/dietary systems.

Other programs for consideration in the spring of 1999 currently undergoing marketing research include statistics, illumination and lighting, agricultural economics, and landscape contracting.



in the spring of 1998. Inferences were made on demand for engineering courses and additional research was



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Wide range

A wide range of research processes were used to prioritize Penn State World Campus educational offerings, but more importantly, research helped to guide a path of low risk and brand equity maximization of the Penn State name. Penn State's use of marketing research has made the likelihood of making mistakes such as poor pricing decisions or entry into a highly competition or technology deficient market unlikely.

As technology continues to change and greater educational offerings become more prevalent through the Internet, marketing research will help assess Penn State's current offerings and expand to other programs and degrees. While competition will no doubt increase, Penn State's programs are unlikely to incur many attacks due to the university's signature program positioning and constant use of marketing research to reach new customers. □

Front line

continued from p. 21

mation. The site also features service and support areas and a knowledge database.

Bay Networks conducts a quarterly user survey to obtain information about Web site visitors' Internet architecture, the browsers they use, which platform(s) they use, if they use Java, and their overall satisfaction with the Bay Networks site.

Surveys are also run in the different sections of the site, to see how the various audiences (resellers, network managers, etc.) feel about the sections designed for them. A Java applet randomly invites visitors to take the survey.

Quick turnaround of results is one of on-line research's selling points, says Connie Sanchez, Bay Networks' Web marketing manager. "It depends on how much traffic your site generates, but we have no problem turning around 500-response surveys in a few days. Recently, for example, we were designing a new section on the site and we wanted to find out what size screen users have, so that we can design content to take advantage of that. We were surprised to find out that 80 percent were on larger screen sizes. We needed that information right away to move ahead with the design work."

Sanchez says that the ability to embed graphics in the survey form aids respondent recall. "For a technology survey in which we asked what plug-ins [like Acrobat or Shockwave] respondents had, we embedded the download icons into the survey so they would click on the ones they had on their system. That helped people remember, because they might not recall the name of the product but they recognize the logo."

That capability will help Bay Networks as it looks at conducting on-line usability testing. "We're exploring that as a way to test different concepts and mock ups of user interfaces. We would like to actually load the graphical interface; it would be embedded within the survey so people can view it and make comments and answer questions."

For some of its on-line research, Nickelodeon uses Digital Marketing Services (DMS), a Dallas, Texas, firm that gives clients access to America Online's (AOL) 12 million users through AOL's Opinion Place, a member area devoted to research. Visitors to Opinion Place provide screening information about themselves which enables them to be considered for a wide range of sur-



veys.

For Nickelodeon's surveys, parents of nearly 1,500 7-to-14-year-old kids were recruited to help their kids complete a survey on their on-line habits, including their favorite on-line locations (both Web sites and AOL areas), their impressions of Nickelodeon, etc. "Our aim was to segment kids in terms of how they use on-line and find out what they like or don't like about given areas in sites," says Dave Charmatz, director of Nick at Night and TV Land research for Nickelodeon. "Kids are hard enough to talk to anyway, and with our strong presence on AOL it made sense to do it on AOL and the Opinion Place seemed like the perfect place to do it.

"All the controls that you have on a regular survey are there. If you want to make sure you don't oversample in a certain age group, you just put those requirements in up front. You can fill out many questionnaires in a short

"Our aim was to segment kids in terms of how they use on-line and find out what they like or don't like about given areas in sites."

— Dave Charmatz, Nickelodeon

period of time; we can do 1,500 kids in a week."

Involving the parents was key, Charmatz says. "AOL overall has relatively strict guidelines on talking to kids on their service. Our standards are even more rigid than theirs are. But any time you're talking to kids, especially the young ones, you need to involve the parents because of their ability to type and help answer the questions. As far as parent supervision, we want to make sure they're comfortable with what we're asking the kids, and make sure that anything we're asking isn't too confusing. We're very cognizant of on-line security and we don't ask anything very personal. And since it is done in a

secured area on AOL, they're more relaxed about the process."

Like Bay Networks' Sanchez, Charmatz cites the ability to incorporate graphics into surveys as a welcome aspect of on-line research. "We used miniaturized front screen captures of the Web sites and on-line areas we were asking the kids about, which was a big plus for us because we felt that it limited some of the confusion between complementary Web sites and AOL areas."

"We were able to use images and logos as reference points to help the kids identify if they had visited the site, as a point of reference when we were asking them about it," says Shelly Bracken, senior director, business development, DMS.

Caveats

On-line research has a great future, Charmatz says, as long as people keep some important issues in mind. "For certain types of products it's ideal. But overall, on-line has a ton



of caveats that have to be assumed going in, especially when you're looking at other people's research. If you know what those caveats are, that's fine. Any research has its natural biases; on-line has more than

just one or two.

"We use on-line because we want to talk about on-line to kids who are on-line and we use AOL because it's such a major presence; two-thirds of kids on-line are using AOL to some extent. It's the best place for us to do this kind of research. That's not to say we won't do research on the Web using the nth visitor or something like that. But then there are other issues with security on the Web where it's a lot harder to get parents to sign off on letting their kids take surveys. In this environment we know the parents are more willing to give us that kind of permission."

In one-PC, one-phone line households, many kids are allowed only a limited time on-line. So they may not want to take valuable time to conduct a survey, Charmatz says. "There are some issues with self-selection, but DMS tries to go back and sample off-line as well as on-line to see that their sampling procedures match the overall AOL universe and how it projects to the national universe."

The capabilities of on-line research are growing (to include more advanced graphics presentations and audio and video streaming), but unless home computer technology keeps up, the advances won't mean much. "If the respondent can't handle all the graphics and data because they are using a 14.4 modem and a 386 machine, it's not that useful," Charmatz says.

Respondent control

As these examples show, though on-line research isn't yet suitable for surveys of the general population, it is a great way to reach specific audiences. And in many cases, it allows respondents to control when they participate in the research process. "Over my years in research, I've found that most consumers truly do want to give their opinion. Most are interested in companies providing better things for them, but they want to give us that information at their

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convenience, not when we want them to," Bracken says.

In addition to controlling when they take the survey, on-line respondents can often control how long they spend completing it. They aren't

that has hurt our industry the most is getting people on the phone and saying, 'I just have a few questions for you' and keeping them on the phone for an hour," Bracken says. "They decide they aren't going to do that

again. We're up-front with respondents about the length of the survey and they are there because they have the time to take the survey. When they are ready to give their opinion, the survey is available for them 24 hours a day, seven days a week.

"We know how difficult it is to

"We use on-line because we want to talk about on-line to kids who are on-line and we use AOL because it's such a major presence; two-thirds of kids on-line are using AOL to some extent."

— Dave Charmatz, Nickelodeon

at the mercy of an interviewer on the other end of the phone line. "That's important because one of the things

interview anybody, especially kids. People are not answering the phones, they're not in the malls stopping for

Names of Note

continued from p. 10

Crimmins and Forman Market Research, Inc., Southfield, Mich.; **Christine Farber** of Eagle Research, Denver; **H. Grace Fuller** of Fuller Research Services, Inc., Portsmouth, Va.; **J. Patrick Galloway** of Galloway Research Services, San Antonio, Texas; **Ann Hudson** of The Consumer Center of Mid-Florida, Safety Harbor, Florida.; **Gwen Kaplan** of Survey Sampling, Inc., Fairfield, Conn.; **Cathy Kneidl** of Quality Controlled Services, Fenton, Mo.; **Michael Mermelstein** of Communications Center, Inc., Washington, D.C.; and **Betsy Peterson**, MRA executive director.

Margaret Bustell has been named midwestern manager, advertiser/agency services, for *Arbitron* in Chicago.

Market Probe, Inc., a Milwaukee research firm, has named **Karen**

Ethington, CPA, accounting & financial officer.

Dan Bernard has joined *Marketing Systems Group*, Philadelphia, as vice president of the PRO-T-S Telephony Systems division. In addition, **Tom Barbera** has been named vice president-marketing for all corporate activities, and **Gregg Kennedy** has been named vice president of the GENESYS Sampling Systems division.

Answers Research, Solana Beach, Calif., has added **Terry Kaufman** to support its business development efforts.

Richard Sciacca has been promoted to manager, worldwide marketing research and product optimization at *Abbott Laboratories Diagnostics Division* in Chicago.

Schulman, Ronca & Bucuvalas, a New York research firm, has appointed **Mark E. Donnelly** to head its Financial Services Group.

surveys. As an industry we do research to find out what consumers want to tell our clients. With the rising non-contact and refusal rates, consumers are clearly telling us that [on-line research] is what they want and yet we are the last to take our own advice. We ask our clients to start listening to the consumer. I think we in the research industry need to start listening to the consumer as well." □

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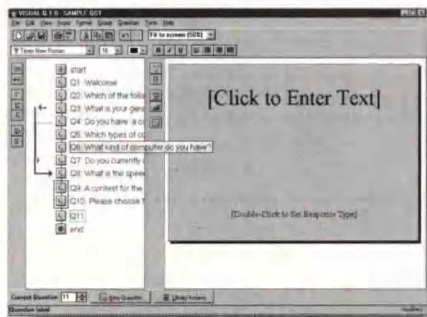
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Editor's note: Ron Sellers received the following e-mail in response to his article "Outsource or keep it in-house" (QMRR, May).

To: Ron Sellers
Subject: Congrats on your article in Quirk's

Hi, Ron. I just read your article in Quirk's, and I wanted to congratulate you for being the first person to really hit the important issues related to research outsourcing right on the nose. I think you caught the pivotal issues and I appreciate how you didn't pass summary judgment on any particular client decision. I generally have come to expect vendor representatives who write for trade

publications to come out strongly on one side of this issue (and you can guess which side that is...).

You may find my personal experience validates your opinion. I've served clients both as a vendor and as an internal consultant (in my current position, for example). I've followed in my current position a variety of tactics across a number of projects, depending on the circumstances and on my assessment of the vendor's strengths.

To wit, when I'm really pressed for time on competing projects, and I have a strong vendor with considerable experience on the key issues, I'll give them the whole enchilada and even bring them in for a presentation (which is not traditional in this particular

corporate culture). Other times, I'll hire a very competent research firm to really do no more than field and tab, because I trust their interviewers to be professional and competent—and then I conduct the advanced analysis and translate results into recommendations for the executives and managers. Through no fault of their own, this is something which few vendors can do effectively.

Again, I commend you on an excellent article and I wish you luck in your future pursuits.

Robin Way
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Please add the following firm to the 1998 Telephone Interviewing Facilities Directory:

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Corrections

The list of authors of the article "Using virtual reality-based conjoint to capture the voice of the customer" (p. 34, May QMRR) was incomplete. Please add Sheryl Cates, project manager, Research Triangle Institute, as a contributor.



Trade Talk

By Joseph Rydholm/QMRR editor

QMRR Web site adds more features

To close our second annual on-line research issue, I thought I'd give you an update on some of the enhancements we're planning to make to our Web site, www.quirks.com. We're hoping to have them all in place by late summer or early fall.

Events Calendar. Although we often include a Research Calendar in the Product & Service Update section of the print version of QMRR, information on research industry seminars and conferences hasn't been available on our Web

site. But with the debut of the Events Calendar, you'll be able to plan months in advance and click directly to the event of your choice for more details. Where applicable, we'll also link you to on-line registration. Send press releases to me via e-mail (joeqmrr@mn.uswest.net) or fax them to me at 612-854-8191. I'll make sure they appear in the magazine and also pass them to our webmeister, Dan Quirk, for placement on our Web site.

Software Demos & Downloads. Each February for almost 10 years QMRR has published the most complete and detailed directory of marketing research related software. Our most recent directory listed hundreds of titles in dozens of categories. But no matter how well the software is described and the features highlighted, nothing beats a hands-on demonstration. That's why we're designing a special section of our site just for software demos and downloads.

Subscription Center. Our Subscription Center will allow readers to make address changes and request new subscriptions and sample issues. In addition we'll collect e-mail addresses for a monthly e-mail newsletter for research firms which will keep them informed of upcoming issues, directory listing deadlines, advertising dates and other pertinent information regarding both the printed publication and the Web site.

Education Center. Here we'll list colleges and universities around the country that offer courses and programs in marketing research with links to their Web sites. It's never too late to learn!

If there are other features you'd like us to add, please let us know. Our aim is to make the Web site a useful companion to our printed magazine. If you have questions about our Web site, feel free to call Dan Quirk at 612-854-5101. □

Farcus

by David Waisglass
Gordon Coulthart



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