



# QUIRK'S

Marketing Research Review

Volume XIII, Number 7

July 1999

## **Casting a wider net: BASES builds an on-line panel**

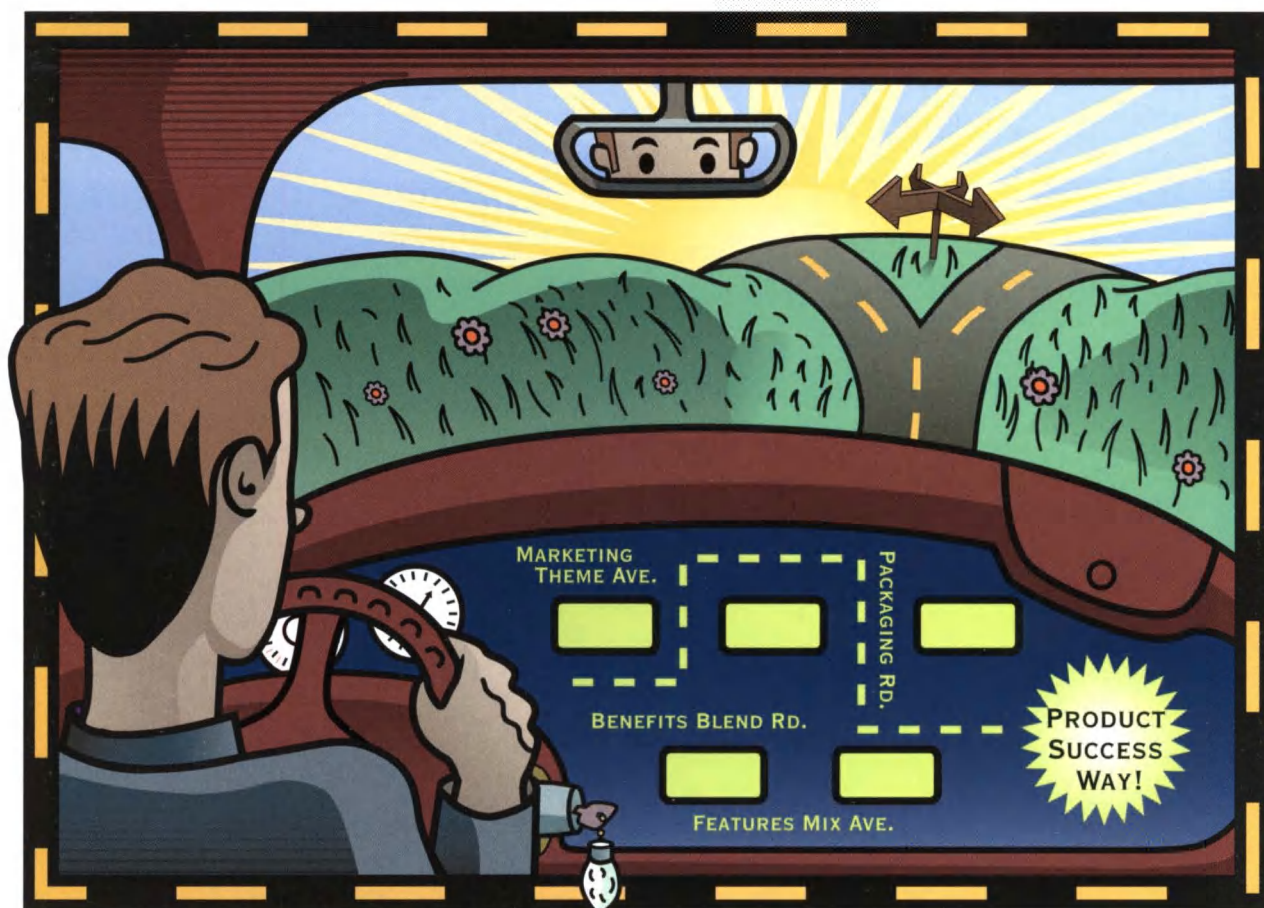
*Notes on Web  
interviewing*

*Recruiting for  
on-line studies*

*Comparing seven  
forms of on-line  
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*E-mail: a  
guerrilla app?*





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# QUIRK'S

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## Is history also herstory?

Men and women demonstrate surprising differences and similarities in their views of major events of the 20th century, according to a study conducted by Roper Starch Worldwide for The History Channel. When asked to choose the one event

that interests them most, men are more likely than women to choose wars (26 percent vs. 15 percent), technological advancements (7 percent vs. 2 percent), or economic events (11 percent vs. 6 percent). For women, the Oklahoma City bombing (7 percent vs. 2 percent of men), major health developments (17 percent vs. 11 percent) such as AIDS or

the development of antibiotics, and events related to women's rights or the changing role of women in society (10 percent vs. 2 percent) are more interesting than for men. The telephone survey of 1,003 adults, conducted from Feb. 24 through March 8, has a maximum sampling error of  $\pm 3$  percentage points.



### Loyalty programs work

Customer loyalty programs will increase business for companies, according to research findings from a study by Carlson Marketing Group (CMG) and Total Research Corporation. The survey on loyalty marketing and consumer spending, conducted during the fourth quarter of 1998 by the Minneapolis office of Total Research Corporation for Carlson Marketing Group, a division of Minneapolis-based Carlson Companies Inc., found that

six out of 10 people claim spending more money with the company that offers their favorite loyalty program than they did before joining the program. Overall, people estimated they increased their spending by 27 percent.

"Brands can no longer depend on price and product alone to differentiate themselves," says Dick Dunn, vice president-business development, CMG's Loyalty operations. "Loyalty programs do increase business for a company, but for a loyalty program to be worthwhile, it must be possible to measure its effect on consumer spending. If it can't be measured, it's likely to be discontinued," adds Dunn.

The study noted that participants in airline and credit card programs were more likely than others to give more business to the company after joining its loyalty program. Credit card loyalty programs derived the greatest increase in usage, it said, with a 46 percent gain. Long-distance phone companies, rental car firms and lodging companies were also more likely to use such loyalty programs.

CMG said the survey of loyalty program members showed that rewards are the most important feature of any program — followed by special services, special offers or one-time discounts. The study also revealed that if a company were to discontinue its favorite loyalty program, 60 percent of the respondents would spend less with that company. Survey respondents estimated that, on average, they would cut spending by about 30 percent. Credit card companies would be most adversely affected by discontinuing their program.

Consumers reported that they participate in an average of 3.2 loyalty programs. Gender and income influence participation: as household income rises, people tend to participate in more loyalty programs, with men participating in more programs than women. For more information call 612-525-4050.



In choosing among major events of each decade, women are about as likely as men to choose WWI (38 percent vs. 43 percent) or the Japanese attack on Pearl Harbor (28 percent vs. 29 percent).

Women are less likely to select the dropping of the atom bomb on Hiroshima (22 percent vs. 33 percent), the war in Vietnam (27 percent vs. 34 percent), or Desert Storm (21 percent vs. 36 percent) as the most interesting events of the decades in which these took place, and they are less likely than men to choose a war as the single most interesting event of the 20th century (15 percent vs. 26 percent).

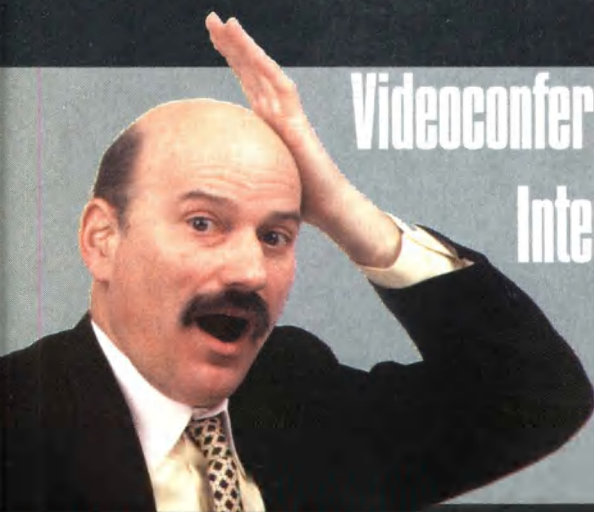
Men are twice as likely as women (39 percent vs. 20 percent) to describe the stock market crash of 1929 as the most interesting event of the 1920s. In their choices of most interesting event of the century, 11 percent of men say they find one of three major economic events most interesting — the 1929 crash, the Great Depression that followed and FDR's New Deal to help the nation recover — compared with just 6 percent of women.

While many women find technological advances to be among the

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# Names of Note

The board of directors of Atlanta-based *Equifax* has elected **Thomas F. Chapman** to be chairman of the board, succeeding **C.B. "Jack" Rogers**, who is retiring. Chapman will continue to serve as president and CEO of Equifax. Rogers will continue as chairman of the executive committee until his 70th birthday in October.

**Kate Feather** has been promoted to vice president, *RONIN Research Services*, Princeton, N.J. RONIN has also appointed **Joanne Sonnelitter** as senior technical research manager and **Elizabeth Zhou** as technical research manager.

*The Marketing Research Association* (MRA) has installed its 1999-2000 board members. Officers

installed to the board are: **Joanne Robbbaro** of Lieberman Research Worldwide, Los Angeles, Calif., as president; **Judith Hominy** of Pat Henry Market Research, Inc., Cleveland, Ohio, as president-elect; **Carl Iseman** of Assistance in Marketing/Baltimore, Towson, Md., as treasurer; **Judy Dyer** of Yankelovich Partners, Norwalk, Conn., as secretary; and **Donald J. Marek, Jr.**, of Southwestern Bell Telephone Company, St. Louis, Mo., as immediate past president.

Installed as directors at large are: **Paula Crimmins** of Crimmins and Forman Market Research, Inc., Southfield, Mich.; **Christine Farber** of Eagle Research Denver; **J. Patrick Galloway** of Galloway Research Services, San Antonio, Texas; **Gwen Kaplan** of Survey Sampling, Inc.,

Fairfield, Conn.; **Cathy Kneidl** of Maritz Marketing Research, Fenton, Mo.; **Sheila Lundy** of AC Nielsen/BASES, Covington, Ky.; **Michael Mermelstein** of Communications Center, Inc., Washington, D.C.; **Jane Rosen**, Nichols Research, Inc., Sunnyvale, Calif.; **Peter Van Brunt** of ReData, Inc., Bethesda, Md.; and **Betsy Peterson**, MRA executive director.

Atlanta-based *Elrick & Lavidge Marketing Research* has named **Duncan Millar** director, business development group, Los Angeles.

*Burke Marketing Research* (BMR), Cincinnati, has promoted **Ray**



Millar

Barber

**Barber, Linda Klump** and **Linda Orewiler** to senior vice president, BMR client services. *Burke Customer Satisfaction Associates* has



Klump

Boyd

promoted **Tim Boyd** to senior vice president.

**Karen Stuth** has joined *Taylor Nelson Sofres Intersearch*,  
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## On-line research service targets physicians

Caduceus Marketing Research (CMR), Mt. Arlington, N.J., is offering PCN Online, an on-line research vehicle which draws participants from its Physicians Consulting Network panel of more than 10,000 members in a range of medical specialties including allergists, pediatricians, neurologists and internists. Questionnaires are programmed on-line on CMR's Web site. Clients are able to view and approve their questionnaires via the Web site. After questionnaire approval, physicians are e-mailed an invitation to participate, along with a link to the questionnaire. For more information call Tom Simpson at 973-770-4000 or visit the company's Web site at [www.cmr-usa.com](http://www.cmr-usa.com).

## ARF offers integrated marketing book

The Advertising Research Foundation (ARF), New York, has published *The ABC's of IMC*, a compilation of articles on integrated marketing communications (IMC). Although it's one of the most important developments in marketing, IMC has until recently been difficult to define, implement and measure. These articles are geared to helping business practitioners gain a better understanding of the factors necessary for a successful campaign. Articles range from the effect of integrated marketing communications strategy on globalization to addressing return-on-investment issues.

The book features articles from European experts such as professors Christian Gronroos and Patrick Barwise, and case studies from companies like Saturn and 1-800-Flowers. The book's 36 articles are divided into four categories: So What Exactly is IMC?; Marketing in the 21st Century;

Redefining the Marketing Communication Disciplines; and Implementing IMC — Advice and Case Studies. The book can be ordered from the ARF's Web site at [www.arfsite.org](http://www.arfsite.org) or by calling 212-751-5656.

## Survey system designed for intranet or Internet

Manta Corporation announces the latest release of MantaINSIGHT, an enterprise-class survey and data collection software application with design features that allow the rapid creation and deployment of surveys within a corporate intranet or on the Internet.

MantaINSIGHT requires no programming to develop and deliver a complete survey. All elements of survey development are no more complicated than a word processor. Even dropping custom graphics or objects such as a video clip onto the question form is a point-and-click procedure.

Seven question types can collect the information required. In addition, MantaINSIGHT allows survey authors to create their own question type to improve the respondent experience and the results collected. Other specialized functions include lookups to external data such as Oracle or IBM's DB/2, instructional panels and multilingual surveys.

Respondents can complete a survey through standard browsers, or a Lotus Notes client. Programmable e-mail notification triggers link them to the survey database. The system will also monitor survey status and send reminders. MantaINSIGHT can import respondent lists from external sources in multiple formats, including demographic information used as a basis for subsequent reporting. Survey responses can be exported in a variety of formats as well.

MantaINSIGHT has been tested to support more than 200,000

responses, 130,000 invited respondents and 1,500 questions within a single survey instance. The underlying architecture of the software has been optimized for use on a heavily used system. For more information call Alan Kitty at 609-219-9339 or visit the company's Web site at [www.mantacorp.com](http://www.mantacorp.com).

## Report analyzes effect of deregulation on Georgia's natural gas industry

Atlanta-based Energy Market Solutions has released an analysis of Georgia's natural gas deregulation process, aimed at answering the question "How will the events of Georgia's dynamic and blazingly fast natural gas deregulation change future utility deregulation?"

Georgia's deregulation model is setting a new precedent in utility deregulation and marketers' strategies. Other states are viewing Georgia as a national model to speed their customer conversion process. In California, 1 percent of electric customers switched suppliers after nine months of competition. In Georgia, over 42 percent of natural gas customers switched after only five months of competition.

The Energy Market Solutions study explains why and how deregulation occurred; the Georgia deregulation process; strategies, tactics and pricing schemes of key players; detailed profiles of players, quitters and influencers; and lessons learned.

Highlighted topics explain the effect of "anti cherry-picking" rules (and their effect on "interruptible" gas pricing strategies), the importance of understanding the long-term implications of the "rules of the game," and the impact of non-energy related com-

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# The Future of Online Marketing Research Just Got Brighter!



The management team from left: Hugh Davis, VP, cool technology; Alastair Bruce, VP, client development; Brin Bell, VP, business development; Susan Rosovsky, VP, client services; Steve Cook, SVP, client development; Rudy Nadilo, president & CEO.

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**The Marketing Research Association (MRA)**, Rocky Hill, Conn., has formed a new council to aggressively address the growing technology needs of its membership. The Technology Council's key objectives are to enhance the existing MRA Web site ([www.mra-net.org](http://www.mra-net.org)) as an information resource to its existing and future members; to educate consumers and government via the MRA Web site about the value of research and why it is important they participate in research projects; to provide cost-effective products and services to MRA members via the Internet. The members of the new council are: Glenn Fishback, council chair, director of sales and marketing for DBM Associates, Menlo Park, Calif.; Jacqueline Herman, council vice chair, COO at Pat Henry Market Research, Inc., Cleveland; Scott Spain, special technology advisor, sales and marketing manager with Venture Data, Salt Lake City, Utah; Mike Exinger, council member, director of research administration at Clearwater Research, Boise, Idaho; Gene Filipi, council member, western regional sales manager, Computers for Marketing Corp., San Francisco; and Gabe Oshen, council member, V.P. account services, Interviewing Service of America, Inc., New York.

**The A. C. Nielsen Center for Marketing Research** at the University of Wisconsin School of Business has announced the First Annual EXPLOR Award and Competition. The contest honors companies that achieve "EXemplary Performance and Leadership in Online Research." Participating research sponsors include Digital Marketing Services, ASI Market Research, Inc., Custom Research, Inc., Elrick & Lavidge, Guideline Research Corporation, M/A/R/C and Roper Starch Worldwide. A panel of independent industry and academic experts, representatives from research supplier companies and experts from organizations such as the

Advertising Research Foundation will review the submissions, which were due July 1. The winning organizations will be announced September 1 and the prize and trophies will be awarded during a market research seminar at the University of Wisconsin-Madison in October.

The management team of **Greenfield Online, Inc.**, a Westport, Conn., research firm, has purchased the company from Andrew Greenfield. Details of the private transaction were not disclosed. Funding for the buyout included the support of an investment group led by the New York venture firm of InSight Capital Partners. The group includes Forrester Research; Burt Manning, former chairman and CEO of J. Walter Thompson Advertising; Stephen Friedman, former chairman of Goldman, Sachs & Co.; UBS Capital and Wexford Management.

**Paradigm Technologies International** has moved to a new location at 391 Draco Road, Piscataway, N.J., 08854. Phone 732-248-7123. Fax 732-248-7125. The firm's e-mail address remains unchanged at [ravipara@aol.com](mailto:ravipara@aol.com).

**SPSS MR**, Chicago, has announced plans to establish a new standard for market and survey research software as a part of its Vision 2000 development strategy. While continuing ongoing maintenance and support of the current line of products, SPSS MR has begun to focus development efforts on technologies for the new millennium. Vision 2000 will result in open standards for research software, enabling the easy movement of data between different computer systems or software packages, regardless of the source of the data or the manufacturer of the systems.

Amy Davidoff has launched a new business analysis firm, **Market Voice Consulting, LLC**, and will serve as its

president. The new firm focuses on helping small-to-midsize companies analyze their business operations. The firm is located at 333 East Ohio Street, Suite 120, Indianapolis, Ind., 46204. Phone 317-635-9640. E-mail [adavidoff@market-voice.com](mailto:adavidoff@market-voice.com).

John Houlahan, founder and chairman of **FocusVision Worldwide**, a Stamford, Conn.-based videoconferencing firm, forecasts that if current growth trends continue, more than 200,000 focus group interviews will be conducted in the U.S. next year. Houlahan estimates that 174,000 focus groups were conducted in the U.S. during 1998, a 12 percent increase over the prior year. This is a 56 percent increase over 1993, when 110,000 such interviews took place.

Houlahan believes the dramatic increase in qualitative research activity reflects the fierce competition among marketers for consumer loyalty and spending. In addition, more companies are trying to establish stronger brand recognition so they can create preference for their products and services in this competitive marketplace. Technology and financial services are two categories where there has been an especially marked increase in the amount of branded marketing and research activity, Houlahan says.

The growth in qualitative research isn't confined solely to the U.S. "On a worldwide basis, we estimate that 407,000 focus groups were conducted in 1998, which is a 14 percent increase over the prior year," Houlahan says.

The analysis indicates that the United Kingdom, France, Germany, Italy and Spain accounted for 31 percent of total world volume. The U.S. represents 43 percent; Asia, Latin America and the rest of Europe account for the remaining 26 percent of total focus group volume. For more information call John Houlahan at 203-961-1715.

**ACNielsen U.S.**, an operating unit of ACNielsen Corporation, announced



that Campbell Soup Company has signed a five-year contract to use ACNielsen's market research, information and analysis services beginning August 1, 1999. The agreement will cover all product lines in Campbell's U.S. Grocery Division and Pepperidge Farm Division. In addition to ACNielsen's core SCANTRACK retail measurement service, Campbell's will be utilizing the company's Homescan consumer panel and its modeling and analytic capabilities.

**Opinion Research Corporation**, Princeton, N.J., has completed its previously announced acquisition of Macro International Inc., a research, consulting and technology company based in the Washington, D.C., area. The total cost of the acquisition, including the assumption of pre-existing debt, was approximately \$28 million plus certain future payments contingent upon performance of the acquired business. Macro's EBITDA (earnings before interest, taxes, depreciation and amortization) is approximately \$5 mil-

lion out of revenues of \$62 million.

**Elrick & Lavidge Marketing Research**, Tucker, Ga., is launching a series of syndicated information products that will survey how America shops. Featured will be the role of e-commerce in both consumer and business purchasing.

**Market Facts, Inc.**, an Arlington Heights, Ill., market research and information company, has announced an agreement with **Harris Black International, Ltd.**, a Rochester, N.Y., research company whereby Harris Black will provide Market Facts with access to its Harris Poll Interactive Panel under a preferred pricing arrangement. Market Facts also acquired 4 percent of the common stock of Harris Black for an investment of \$4.1 million.

**America Online, Inc.**, has acquired total ownership of **Digital Marketing Services, Inc.** (DMS), a provider of on-line incentive marketing programs and on-line custom market research.

America Online, which previously held a majority share of DMS, acquired the outstanding minority stake to give the company full ownership of DMS. Terms of the transaction were not disclosed. DMS founder Dennis Gonier will remain president of DMS and will also become senior vice president of America Online in the AOL Interactive Properties Group.

**NFO Worldwide, Inc.**, Greenwich, Conn., and French research firm **IPSOS, S.A.** will pursue independent strategies for access panel activities within Europe. As part of the agreement, the companies agreed to terminate their almost four-year joint venture relationship, and IPSOS agreed to purchase NFO's entire joint venture interest. The purchase price was not disclosed. However, NFO indicated that the transaction would not have a material effect on its financial statements. NFO's recently acquired European subsidiary, Infratest Burke, currently owns

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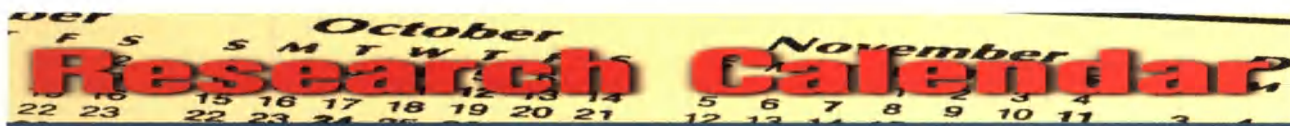
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**NATIONAL DECISION SYSTEMS CONFERENCE:** San Diego-based National Decision Systems will hold its annual users conference on July 24-28 at Loews Coronado Bay Resort in San Diego. In addition to industry and application-specific breakout sessions, the conference will highlight the company's new products and services. Industry tracks will include retail, restaurant, real estate, non-profit and more. Breakout session topics will range from site selection and merchandising to database marketing and intranet initiatives. For more information contact Melissa Barry at 800-866-6510 ext. 575, or at [melissa.barry@natdecsys.com](mailto:melissa.barry@natdecsys.com).

**FROST & SULLIVAN CONFERENCE:** Frost & Sullivan will hold its second annual Advanced Marketing Research Conference and Exhibition, themed Driving Strategy with Market and Customer Research and Intelligence, from August 9-12 at the Hotel Nikko in San Francisco. The conference will feature information about the latest trends in quantitative analysis, market research, surveys, and new technologies. Forecasting techniques, market research on the Internet, and competitive engineering will also be of focus. For more information call 212-964-7000, e-mail [cfsales@frost.com](mailto:cfsales@frost.com), or visit the company's Web site at [www.frost.com](http://www.frost.com).

**STATS COURSE FOR MARKETERS:** Henry Stewart Conference Studies will present a two-stage course on statistics for marketers. Stage one, "The Essentials to Get You Started," will be held August 26-27 at the Hotel Surf & Sand in Laguna Beach, Calif. Designed as an introduction to statistics or a refresher to those familiar with some of the techniques, stage one will explain the fundamentals, show how to use basic analysis and interpret the results, and advise paths for additional study. Stage two, "Understanding and Applying the Math and Stats Used in Marketing," will be held September 23-24 at the Chicago Hilton & Towers. This segment will explain which techniques are available, what they can achieve, when they should and should not be used, and how they can be implemented to raise the bottom line. For more information call 800-229-2416 or visit the company's Web site at [www.henrystewart.com](http://www.henrystewart.com).

**ANNUAL ESOMAR CONGRESS:** The European Society for Opinion and Marketing Research (ESOMAR) will stage its 52nd annual Congress and Trade Exhibition from

September 5-8 at Le Palais des Congres de Paris, France. For more information visit the ESOMAR Web site at [www.esomar.nl](http://www.esomar.nl).

**INTELLIQUEST BRAND TECH FORUM:** IntelliQuest will hold Brand Tech Forum Seven from September 22-23 at the Palace Hotel in San Francisco. The theme of the forum is "Leveraging Your Technology Brand — Maximizing its Future Value." For more information call the firm's events hotline at 800-543-6124 or visit the events page on the company's Web site at [www.intelliquest.com/events](http://www.intelliquest.com/events).

**TELATHENA CONFERENCE:** New York-based TelAthena Systems will hold its first annual user conference in New York City on September 30. TelAthena has invited all current and previous users of TelAthena software products to participate in the conference. In addition to new product demonstrations, the company will outline technical objectives it seeks to achieve and solicit the input of clients. A new user group committee will also be established. For more information call 888-777-7565 or visit the company's Web site at [www.telathena.com](http://www.telathena.com).

**BUSINESS GEOGRAPHICS CONFERENCE:** Adams Business Media is sponsoring the eighth annual Business Geographics Conference, themed "Leveraging Spatial Information," at Navy Pier in Chicago from October 4-6. The conference is designed for businesses seeking the latest geographic and demographic data, spatial analysis, and geospatial software tools. For more information call 203-445-9265 or visit the conference Web site at [www.geoplac.com](http://www.geoplac.com).

**YOUTH RESEARCH CONFERENCE:** The European Society for Opinion and Marketing Research (ESOMAR) will hold its Worldwide Youth Research Conference, themed "Youth Power: How to Connect?" from October 24-26 at the China World Hotel, Beijing, China. For more information visit the ESOMAR Web site at [www.esomar.nl](http://www.esomar.nl).

**WORLDWIDE QUALITATIVE RESEARCH CONFERENCE:** The European Society for Opinion and Marketing Research (ESOMAR) will hold its Worldwide Qualitative Research Conference from November 28-30 at the Hotel Athenaeum InterContinental, Athens, Greece. For more information visit the ESOMAR Web site at [www.esomar.nl](http://www.esomar.nl).



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# Casting a wider net

*BASES  
builds an  
on-line  
panel*

By Joseph Marinelli



*Editor's note: Joseph Marinelli is president of Chicago-based SPSS MR. He can be reached at 212-447-5300 or at jmarine@spss.com.*

**A** growing company faces just as many obstacles as opportunities. Covington, Ky.-based market research provider ACNielsen BASES turned an obstacle into an opportunity when it set out to meet the demands of its increasing customer base. The challenge was to create a cost-efficient way to conduct more surveys in a shorter period of time without compromising forecast accuracy.

BASES found its solution on the Web. Using SPSS MR's Quancept Web to support interactive Internet surveys, it created BASES e-Panel, a supplement to its traditional data collection methodology. E-Panel uses a dedicated group of consumers to execute studies on-line, which means an increased survey base and response rate. Since e-Panel respondents are balanced to match the respondent samples in BASES's mall-intercept studies, the firm was also able to maintain its forecast accuracy. As an added bonus, the e-Panel helped the firm boost productivity and save money by centralizing data collection.

#### **Cast a wider net on the Web**

ACNielsen BASES provides forecasting and database comparisons for domestic consumer packaged goods marketers. Clients such as Campbell's Soups, Procter & Gamble, and Pfizer use data from BASES studies to estimate the likely sales volume of initiatives before market entry, and to improve the sales and profit potential of their efforts.

BASES conducts nearly 300,000 surveys each year. This volume of survey data comprises a comprehensive database of consumer reactions and in-market data available. And it allows BASES to offer its clients a forecast accuracy of 91 percent.

High-quality survey data is central to BASES's forecasting abilities. So naturally, a critical factor in deciding how to increase field capacity was the ability to replicate the traditional results. Each available technology had its pros and cons. "We were trying to determine how we could re-create the survey sample. We looked at several alternatives but the results just weren't the same," says Mark Thatcher, director, RP/CRT for ACNielsen BASES. Because those methods required more time and effort from participants they produced fewer completed surveys.

BASES had previously looked into the Web as a possible solution, and now it looked like the best solution. "The Web was more viable because people are more comfortable with the technology," says Thatcher. Once the company decided to use the Internet to collect survey data, a whole new set of challenges presented themselves. The first was to find software that could support large-scale Web surveys as well as meet BASES's standards. And of course the software would have to integrate with the data collection and analysis procedures already in place.

This technology also presented an opportunity for Thatcher and other market researchers to influence development of the product for their industry. Thatcher and several of his peers formed a users group and worked with SPSS's product development team to add features that make Quancept more useful for their specific needs. Several features were also added to tailor Quancept Web to BASES specifications.

#### **Build a panel**

With the Internet interviewing tools in place, the next challenge was to build a survey panel whose demographics paralleled those of the mall intercept surveys. Thatcher knew that e-Panel's success depended on the consistency of the survey panel.

BASES identified survey partici-

pants with the appropriate demographics and solicited them to become part of an e-Panel. Over the next six months it conducted more than 20,000 on-line interviews for 50 initiatives. As hoped, results of the parallel testing were highly correlated with BASES's traditional collection methods.


On-line data collection has given BASES and its clients a number of additional benefits. They have complete control over production. And password protection ensures that respondents complete only one survey.

BASES analysts can begin processing survey results immediately, even before the interviewing is completed. Survey results are automatically linked to the firm's data analysis departments for tabulating and coding. Since the actual data is collected in one place, there's little handling required, which expedites the timing and saves on shipping costs.

For clients, Internet surveys offer an alternative to traditional data collection methods. They will also provide a way for them to access narrower incidence groups, such as mothers of teenage children, for more focused research efforts.

For respondents, on-line surveys offer convenience. "Respondents can complete the survey at night, when the kids are in bed, or start it and complete it at another time," Thatcher says. Participants can also quit the survey and re-enter later right where they left off. Convenience is a major factor behind the increased participation and response times.

#### **Never replace**

Although Internet surveys have proven successful as an alternative methodology, they will never replace traditional data collection. BASES does plan to double its e-Panel size over the next year in order to meet customer demands. This will also give BASES an opportunity to explore the full potential of on-line data collection. 





**Are  
we  
getting  
ahead of  
ourselves?**



**O**f the many lessons being learned in these heady early years of on-line research, one of the best I've come across is: just because you can do something doesn't mean you should do it.

This maxim arose from the experiences of Atlanta-based Turner Entertainment Group and its research partner, Cincinnati-based Burke Interactive, a division of Burke, Incorporated, as they developed and implemented Burke's Digital Dashboard™ method for Web site research. Candid interviews with two key participants illuminate the shaping of an ambitious idea, the efforts to get it off the ground, and the regrouping that occurred after some important realizations.

In 1997, Burke Interactive began conducting some individual research projects on the Web sites of some of the many entities in the Turner Entertainment Group, which includes cable networks such as TBS, TNT, Turner Classic Movies (TCM), and the Cartoon Network. The information from that research was valuable in helping the Webmasters in the various business units change their sites.

(Viewers visit the Turner sites for everything from obtaining inside

information on their favorite TV shows to participating in interactive simultaneous TV/Web events such as NASCAR races during which fans can watch the race on TV and view the action through in-car cameras on the Web.)

In 1998, Burke Interactive pitched an idea it called the Digital Dashboard, which would, in real time and on an ongoing basis, answer a host of questions about the Web sites for several entities within the Turner Entertainment Group, from Webmasters to researchers to marketing people. Site visitors would be sampled on an nth basis to complete a questionnaire covering everything from satisfaction with the site they were visiting to their media consumption habits.

A main goal was to profile the site visitors, says Fred Spring, director of research for TCM. "Assembling an audience profile is easier in the TV industry because we have Nielsen ratings, but in the Web world it's a little more difficult. You can get a sense of it from some of the feedback you get but we really want-

**"Early on, I didn't get the buy-in from researchers at those respective networks to push the idea forward. The Webmasters didn't see the value because they were so caught up in their day-to-day work."**

ed a more thorough profile," he says.

"There are a lot of sites out there that don't pay attention to who's consuming the content," says Dan Coates, vice president, Burke Interactive. "A media company like Turner is all about demographics. So

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*Problems in launching ambitious Web research initiative show Turner Entertainment Group that at this stage, more probably isn't better*

By Joseph Rydholm  
QMRR editor





# Introductory notes on Web interviewing

By Bill Ahlhauser

*Editor's note: Bill Ahlhauser is executive vice president of Americom Research, Inc., Wartrace, Tenn. He can be reached at 931-389-6094 or at [billa@edge.net](mailto:billa@edge.net).*

**T**his article discusses broad issues in Web and other computerized interviewing. While it is necessarily written at a general level, we hope you find it helpful in your specific considerations.

One could think about issues related to Internet surveys in five broad categories: 1) projectability, 2) applicability and sophistication, 3) ease of use, 4) purpose, and 5) extension.

*1. Projectability.* Normally, market research must be credibly projectable to the total target population, which depends on random sampling. From traditional research methodologies, we know that no sampling is truly random. With declining participation rates in all the intercept methods, their projectability is subject to renewed scrutiny. Internet sampling needs the same kinds of adjustments between the theoretically ideal and the pragmatic, and will ultimately be proven viable by the same kinds of practical experience, emphasizing the fact that samples will demonstrably be representative based on key characteristics. The remaining differences

will be resolved by weighting back to the target population, and expertise on when and how to weight will be a differentiating factor in research competition.

In addition, concern about the projectability of Web research follows the grand tradition of concern for telephone interviewing when it emerged. Telephone interviewing overcame these concerns by dint of the incredible advantages it brings to many types of surveys, and propelled by the pervasive and transforming effect the telephone was having on society. We have found that clients (end users) have so far driven the majority of Web research, not





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because they have facts that researchers don't have, but because they envision the effect the Web may have on their business. So Web interviewing will catch up to societal trends.

Back on the ground, the problems look like this. Recent studies report that 26 percent of U.S. homes are on-line (out of 50 percent that have PCs), and the number is rising dramatically. It's hard to say you won't get a projectable sample out of that big a proportion, especially for populations capable of buying big-ticket or high-tech items.

Another issue, with permutations, is drawing the sample. When a company which has a Web site is interested in its own customers, there is no problem recruiting a sample which has on-line access from that population. Nor it is a problem to recruit customers of your client's competitors. Among options, you can:

- run ad banners on industry-interest Web sites;
- run ad banners on search engines or portal Web sites;
- send an e-mail to product-interest mailing lists (with appropriate sensitivity to spam vs. opt-in lists);
- recruit from malls (to take the Web survey).

Originally, the issue was that no matter where (what Web site) you recruit from on-line, you are recruiting from a specialized group (the group that frequents the site you're recruiting on). But now there are general interest sites (the portal sites like Yahoo!), other broad usage sites, and just plain more and more people visiting many of those sites. In addition, other approaches are becoming feasible, including lower cost (than mail) panel options, off-line recruiting for on-line work, etc.

In addition, the issue of projectability tends to recede the lower the incidence of the sample being sought. There's clearly a cost factor. In the extreme, it may be less expensive to run banner ads on a specialty Web site which has lower utilization but happens to be exactly the popula-

tion you're looking for, than to run them on a popular but general-interest portal site. There's probably an intuitive factor — the fewer of a group that exists, the more you're going to have to orient your search to the places where they are.

For perspective, there are approximately 150 million people on-line worldwide, about half of them in the U.S.

*2. Applicability and sophistication.* Appropriately wording and presenting questions in self-administered interviews on the computer is its own art, and doing it on the Web is a specialized subset of this art.

A further complication arises from the fact that computerized surveys, while being more reliable in how they execute, are, for practical purposes, restricted to pre-programmed capabilities. You can work with what you find, or commission expanded capabilities.

Among the issues of applicability and sophistication of research in this environment:

- Size (and visual dynamic) of the screen. The screen is only so big; what you want to show, and to ask, has to fit. What are the implications for handling stimuli, laying out questions, using rating scales, etc.?

- Intensity of attention. Statements and questions are often shortened for this environment.

- Graphical user interface (GUI). This refers specifically to clicking on what you want rather than having to type answers or codes. More generally, it refers to the researcher's control over the background, colors, fonts, etc. Control over this set of variables was not in the researcher's hand before. It's both an opportunity and a burden, following this logic: The more graphical and live (life-like) the survey presentation is, the closer we should be to getting a response similar to what the respondent would give in real life. By the same token, the more applicable it is to one person's life, the less it may be to another's. On the Web, there are



also questions of how much control you have over the placement of things on screen, what assumption you make about how the respondent has set up screen resolution (e.g., 640 x 480 or 800 x 600), whether or not you assume the respondent is willing to scroll down.

- Structuring of question types. All computerized interviewing depends on structuring question types. What question types, with what additional options? At the simplest level, for example, if you have a multiple choice question, you still need to be able to define a mutually exclusive answer, such as "None of the above," which is not permitted with other answers. These structures constitute another level of constraint on — or opportunity for — survey design.

- Control of stimuli. Presentation of stimuli operates at multiple levels: Can you keep it hidden until you want respondents to see it? (Yes.) Can you permit respondents to see the stimuli while they answer the questions? (Yes.) What if it's too big to be on-screen with the question? (There are options.) Can you prevent them from seeing it? (Sometimes.) Can you time the presentation? (Yes, on a central location PC interview; no, on the Web.)

- Stimuli constraints. From a technical perspective, graphics are simple to incorporate into Web and other multimedia surveys. However, on the Web, every graphic has to be downloaded to every respondent separately, so the more graphics, the longer the survey will take. Also, the higher the resolution of the graphic, the bigger the file that has to be downloaded. Therefore, the extent of graphics used, and the resolution quality of those graphics, must be considered in connection with a) the likelihood that respondents have fast modems, and b) the incentive for respondents to complete the survey.

One other consideration: you don't want to use graphics that are higher-quality than the expected capabilities of the respondents' computers. Sometimes that's a setting issue,

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sometimes it's a hardware issue.

- Rotation. Can you rotate answers to a question? (Yes.) Can you rotate rating questions? (Yes.) Can you rotate graphical stimuli? (Yes.) Can you control multiple versions by varying the key stimulus page for different respondents? (Yes.)

- Logic. Can you skip from one place in the survey to another based on the answer given to a single choice question? (Yes. For central location PC interviews this is no issue because they are structured with single question per page. For Web interviews, in the effort to minimize excess downloads, there are commonly multiple questions per page. In that case, the page breaks have to be structured appropriately to permit the desired skip.) Can you skip off complex logic? (Yes, within limits.) There are more subtle issues such as, on the Web, you can't really prevent someone from backing up, which affects certain kinds of recall or ad effectiveness research. (But there are ways to deal with this issue.)

- Nature of respondent input. Are respondents comfortable using a mouse? (In central locations, most are; on the Web, everyone is.) Are they comfortable typing? (Again, in central locations, most are; on the Web, everyone is.)

- Hardware and multimedia. Here there's a big difference, at this point in history, between the Web and central location PC interviewing. In a central locations, you both a) know what the hardware and multimedia capability of a system are, and b) you can fairly inexpensively ensure that you have capabilities for full motion video, seamless integration of animation with graphics, etc. On the Web, you don't know (unless you are pursuing a panel design) what the hardware or bandwidth (modem speed) of the respondent are, and you cannot reasonably hope to do video or audio on the Web. (Again, there are options, such as sending a CD-ROM and having the Web interview interact directly with the CD-ROM.)

- Data. The data for closed-end

questions is ASCII format, fixed position, comma delimited, numerically encoded. It is written out as a single record per respondent. Normally the data file excludes data for incomplete interviews. There is an automatic datamap, header file, and other reports. It is easy to pull this data into a tabs package, spreadsheet or database. Data is available real time, and can be available on a password-protected Web site.

- Dealing with practice or test interviews. In central location PC interviews, how do you exclude practice interviews? In Web interviews, how do you exclude test interviews? There are issues of the data itself, and issues related to calculating interview completion rates.

3. *Ease of use.* At the end of the day, all of this must be usable or achievable at a cost which facilitates making money. It has to be efficient. Our firm builds with graphical interfaces for the survey setup process, as well as for the respondent. Therefore, we can usually set up and execute studies at costs which increase profitability for the research company.

4. *Purpose.* What types of surveys are better suited to Web interviewing? As you know, nearly all of the work, time and cost on the technical side of Web surveys is in setting them up. Therefore they are more useful for projects with larger numbers of respondents, or with easy setup.

Because of the questions related to knowing who you are talking to, Web surveys are particularly good for panel-type applications.

Because both sending an invitation and getting the responses are in real time, Web surveys are good when speed is of the essence. Depending on sampling and complexity issues, a Web survey can be written, programmed and executed within a few days.

Because of the geographic spread of the Web, it is a good medium for interviewing low-incidence samples, provided there is time for either pre-



recruiting or live recruiting.

Clearly, the Web is a good environment for interviewing on any high-tech product, and perfect for interviewing on Web site functionality, satisfaction, improvement, etc.

The Web is not good yet for video, audio, animation or high resolution graphics. However, in a hybrid mode, such as with a CD-ROM, the Web can do yeoman's work on multime-

**Clearly, the Web is a good environment for interviewing on any high-tech product, and perfect for interviewing on Web site functionality, satisfaction, improvement, etc.**

dia. (Currently we're working on how we can make such a CD-ROM one-play only, for security reasons.)

The Web is not good for very complex (high programming cost) surveys to be administered to small (low ROI) samples. But even small samples can be done efficiently when the survey is efficient enough.

The Web is terrific for getting customer feedback over a long period (e.g., a year), even when there are relatively few interviews per month, because of the low cost of maintenance for a live survey.

5. *Extension.* There are two forces that may propel Web research into a

more integrated relationship with marketing.

First, Web surveys, because they are controlled on a central server, are only a hair away from one-to-one marketing. This depends on customer consent to using research for marketing purposes and other issues, but the extension of Web research into one-to-one marketing — especially on the Web itself — is probably inevitable.

Second, Web panels, because they are relatively inexpensive to set up

and maintain — due to the lower cost per transaction in this environment — will probably become prevalent for many purposes. Among the impact we expect these panels to have is a significant increase in the number of surveys relevant to day-to-day (at least week-to-week) product development decision-making. We expect the surveys to be shorter, maybe incidence levels lower, and, over the longer term, the stimuli to be richer. **TC**

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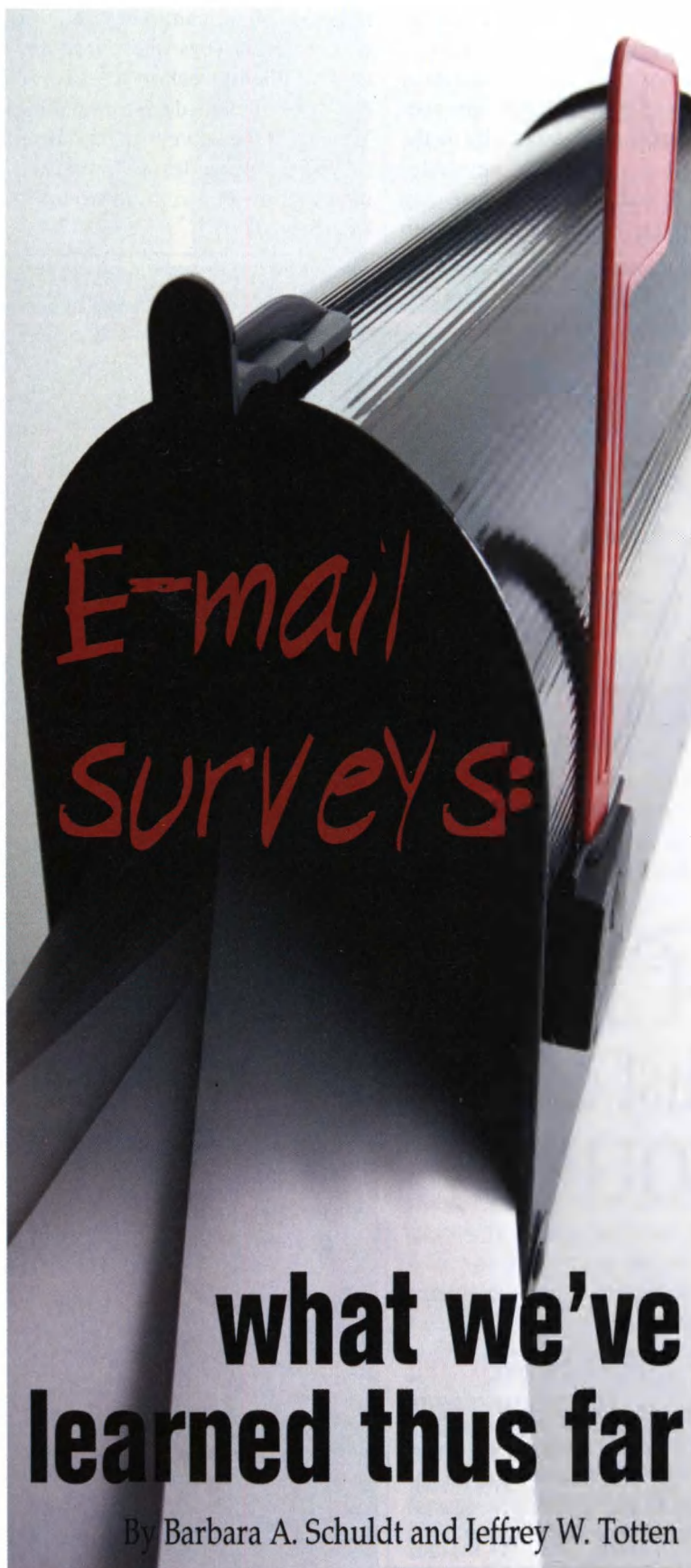
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# what we've learned thus far

By Barbara A. Schuldt and Jeffrey W. Totten

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**O**ver the past 70 to 80 years, the research industry has seen a lot of changes in the data collection methods it uses. Basic data collection methods (mail survey, telephone interviewing, mall intercepts, and personal interviewing) were developed, used, evaluated, and improved upon. With the advent of computer and communications technologies, researchers developed computer-assisted telephone interviewing (CATI), computer-assisted personal interviewing (CAPI), disk-by-mail surveys, and fax surveys as new data collection methods. With the growth of the Internet and computer networks, we're seeing a steady stream of research into the use of e-mail as a data collection tool, along with Web-based surveys.

As with fax survey research, most of the research on electronic mail as a data collection method has been done in comparison with traditional mail surveys. Though Kiesler and Sproull did initial work in 1986, most of the research has been conducted in this decade. Early research in this decade focused on response rates, speed of data collection, and advantages and disadvantages of using e-mail as a data collection method (see Parker, 1992; Walsh, et al., 1992; Schuldt and Totten, 1994; Thach, 1995; Oppermann, 1995; and Schuldt and Totten, 1997).

Research in the last half of this decade has expanded the exploration to include the following: response quality (usually measured by item nonresponse), survey costs, personalization of e-mail, prenotification, and reminders (see Tse, et al., 1995; Mehta and Sivadas, 1995; Bachmann, Elfrink and Vazzana, 1996; Flaherty, Honeycutt and Powers, 1998; Tse, 1998; Weible and Wallace, 1999). E-mail has also been considered in conducting quantitative research studies on the





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Internet, along with Web survey systems, Web CGI programs, and converted CATI and disk-by-mail methods (see Eaton, 1997; Watt, 1997; Weissbach, 1997; Dodd, 1998; and Sudman and Blair, 1999). A number of companies now offer both e-mail and Web-based survey development services.

E-mail offers researchers a number of attractive advantages, the two biggest being very rapid surveying and low cost. What is questionable at this time is the response quantity (i.e., response rate) and response quality of the e-mail method. Multiple contacts of respondents appear to increase e-mail response rates, as they do for other methods. Given the lack of anonymity of e-mail, researchers also need to stress confidentiality more with this method. Monetary incentives are a problem with e-mail, so other forms of incentives need to be developed and tested.

#### Standardization efforts

Thus far, out of convenience to

some degree, and the likelihood of finding universal e-mail access and addresses in this type of industry, college and university faculty and deans have been identified as the populations for many of these studies. What happens when we look at other industries? Individual companies often have their own networks of e-mail and other computer technology/software. How likely are researchers to find companies in the same industry using e-mail technology that would facilitate surveys via e-mail?

What about consumers? More and more people are getting on-line to explore the Internet. It is estimated that approximately 25 percent of the world's population is currently using e-mail. How many are likely to be using one particular e-mail system? How can the researcher get access to this system?

Don Dillman, an expert on the mail survey method, has turned his attention to this new data collection method. Dillman and his co-author, David Schaefer, set out to establish a

methodological procedure for using the e-mail method, as well as experimenting with a multiple method strategy (see Schaefer and Dillman, 1998). Paper and e-mail modes were used in different combinations and contacts (prenotification, survey, reminder, follow-up survey). The mixed-mode strategy is recommended for e-mail surveys, where the use of paper surveys to reach those sample units who are not yet reached by e-mail remedies the "coverage error" (as Schaefer and Dillman call it) encountered by researchers who target populations other than university professors. Interestingly, Schaefer and Dillman found that e-mail works better than mail as a prenotification device for subsequent surveys. Also, they confirmed what previous researchers had tentatively concluded: The survey time frame should be speeded up for e-mail studies. In other words, prenotification, survey, reminder and follow-up survey can be done within 10 to 14 days, whereas traditionally such a time frame would run three to five weeks.

#### What's next?

More research, of course! Seriously, though, we have much yet to learn about using e-mail as a data collection method. We need to test response quality and quantity on more diverse populations and on populations with less e-mail access. We need to test incentives on e-mail respondents. Is there some way to transmit the equivalent of a monetary incentive via e-mail? Perhaps we need to work with our information systems colleagues to standardize electronic mail systems, so constructing e-mail surveys will be easier, and responding to those surveys will, more importantly, be easier. We also need to test longer questionnaires, especially ones that include complicated skip patterns. What can be done to alleviate the anonymity problem and provide some measure of privacy for respondents? How can we reduce the self-selection bias and make the results more generalizable to the populations being studied? Our work on this new method of data col-

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lection, and its relative, Internet surveys, is far from being finished. Also, on the horizon is interactive television. Will interactive television be another medium for researchers to use for data collection? 

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# Is e-mail the 'guerrilla app' for business-to- business research?

By Joanne Gucwa

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Using e-mail for business-to-business market research is still in its infancy. Consumer research, however, seems to be another story. I don't know about you, but every week at least one survey request lands in my e-mail in-box. Several purport to be biz-to-biz but are actually consumer surveys in disguise (or some kind of hybrid). You know the kind: "Say, if you've got a home page and are looking for more hits, go to [www.xyzandabc.com](http://www.xyzandabc.com) and tell us all about yourself so we can sell you our dirt-cheap services. If you do, we'll

throw your name in the hat for our drawing of a Palm Pilot."

Everyone talks about e-mail as the "killer app" for business. Let me tell you why I call it the "guerrilla app" for primary business-to-business market research. Yes, it's cool, easy, cheap, fast and effective. But it also comes with some pitfalls.

By the way, don't get me wrong: the Web is a powerful tool for conducting primary and secondary business research. We daily plumb the depths of the exponentially-expanding Web's secondary resources — our bookmark file has several hundred URLs sorted into several dozen categories. We're also aware of the numerous vendors who will set up a Web-based survey for you (on your own site or theirs) and even collect the responses and do the analysis for

you. Web surveys are definitely way cool, but it's not a consistently easy, fast, or cheap means of surveying. (Although it is the best way to go if you're anticipating hundreds of respondents: replies can be programmed for easy export into your favorite relational database.) And they come with their own pitfalls. Trade-offs are an inevitable fact of life.

One of the reasons I prefer e-mail surveys is that they are a much more personal mechanism, i.e., coming from me, with my e-mail return address, to you, at your personal e-mail address. You don't have to take the extra step to fire up your browser if you're using Notes, Eudora or another non-Web mail program. As a bonus, you've got a copy of what you've sent (unless you've set your



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options to "delete on send") to compare with the summary of the survey results you'll receive after the study is completed (a frequently-used incentive, noted below).

The information or intelligence we're talking about are the usual suspects: intelligence on business customers and channels, markets, industries, technology development and legislation. In this globalizing environment, this research is not limited by geographic boundaries, however. Kuala Lumpur and the kid next door cost the same to access electronically. Many of the traditional processes for developing research surveys still hold true in the virtual world, i.e., carefully defining objectives and appropriate population segmentation.

E-mail has tremendous value for researching "the voice of the customer" — providing you do it right. What's right? And not-so-right? Let's look at some "right" ways of going about guerrilla (e-mail) business-to-

business research.

- Finding the right people to survey: Who are they? Where are they? If you want to contact those in-the-know about industry trends, try the on-line press. I've found dozens of editors and journalists on-line who are ready and willing to answer a few e-mailed questions. An example: We were asked to determine the readiness of the American marketplace in accepting a new safety feature for their cars. What better place to start than automotive writers for newspapers? Here's a great resource: American Journalism Review, which lists 4,925 newspapers on-line at: <http://ajr.newslink.org/news.html>.

Discussion groups don't all focus on kinky sex or video games. Professionals have been known to frequent serious discussion lists. How do you find business people who fit your desired demographics? One of my favorite search engines is HotBot ([www.hotbot.com](http://www.hotbot.com)). Click on "discussion groups" just under its "search" button to bring up the dis-

ussion group search function and type in a keyword or phrase such as "machine tools" — which I did in mid-May, and found several different forums, including [alt.machines.cnc](http://alt.machines.cnc), [sci.engr.analysis](http://sci.engr.analysis), [ott.forsale.other](http://ott.forsale.other), among a half-dozen others, with topics ranging from "wanting to buy" to "help wanted" and "solving mechanical engineering problems."

I maintain multiple lists by "nickname" in my e-mail address book; many are members of various committees of professional, technical and trade associations I belong to. With their permission, I send periodic surveys on a wide variety of issues. You can build a great resource file this way.

Please, please, please...if you use this technique, send the survey "To" yourself and "bcc" your nickname list. You don't want to alienate your would-be respondents by broadcasting their own and every other Tom, Dick and Harriet's name for all to see (not to mention annoying the recipients who need to scroll down...and down...and down the page to see what it is you've got to say). If you're on any personal lists, you know what I mean: forwards of forwards of forwards, all with their own endless stream of names. Sigh.

- In the right numbers: Cast of thousands? Or smart targeting? How many is enough, and what's a waste? If you're doing consumer surveys, you've got a pretty good idea of what numbers you need for statistical significance. Some business-to-business research isn't that much different. One company, for example, might sell industrial supplies (fairly low purchase order value, large number of customers and a healthy amount of repeat business). Another, an engineering company with major infrastructure contracts such as building an airport or a dam, needs to obtain business intelligence on each and every customer — the proverbial market segment of one.

Let me point you to one of the very best articles I've seen anywhere on this topic. It's from the July 1998

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issue of *Interpersonal Computing and Technology: an Electronic Journal for the 21st Century* and it's called "What Sample Size is 'Enough' in Internet Survey Research?"

The Web address (<http://jan.ucc.nau.edu/%7Eipct-j/1998/n3-4/hill.html>) is certainly a handful to type, but well worth it. The real beauty of the Internet as a resource is in its ability to hotlink to references, and this article more than proves the rule. Go thou and read.

- Asking the right questions: Ask permission first? Or just send them? It depends. You don't want to be accused of spamming. My rule of thumb is this: for two to five questions, just send them; ask permission if the survey is long.

Here are two (disguised) examples of pre-survey inquiries:

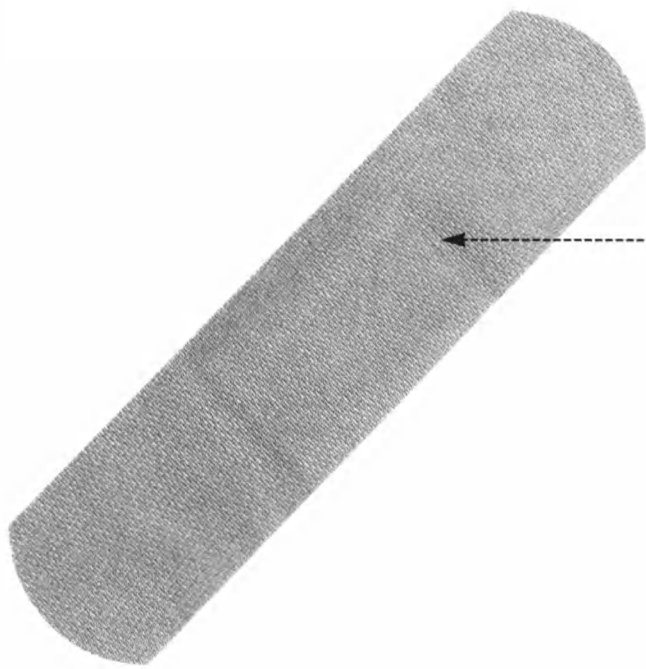
I am conducting an e-mail study on the marketability of high speed gears and would appreciate your input. It has 11 questions and takes about five minutes. We're offering a summary of the results to those who participate. Please let me know if you or any of your staff would like to participate. Thanks very much!  
Joanne Gucwa  
President

Hey game-software designer! We've designed a brief survey that'll be a blast to fill out and will help us fine-tune a new product. Please understand we're not selling anything, and because we're not sending this out to the great masses in cyberland, we'd sure appreciate if you'd take a couple of minutes to fill in the blanks. We promise not to release your address or bug you with information on our product once it comes out unless you check the [O.K.] box at the end of the survey.  
Just hit "reply" and type an X in the [boxes] that apply or type in your comments. Once you're done, hit "send" and we're out of your hair. Enjoy, and THANKS!!

- In the right way: Set the stage? Provide an incentive? Make it easy and entertaining? Or get right down to business? Busy "wired" executives get hit with dozens — more like hundreds, actually — of e-mails every day. With the digital equivalent of the TV remote (the trash icon or delete button), their attention to your mail is in the realm of little more than nanoseconds. How do you capture their attention?

First, do not shout IMPORTANT

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MESSAGE!! in your subject header — unless you want them to mistakenly think you're touting a new porn site. We've found that "Request for assistance, please" gets more attention and results than any other header we've tried. Once your respondent opens your mail, state your business in as few words as possible (see the first example in the previous section).

Incentives are frequently used in all modes of business-to-business surveys, although the electronic form makes it that much easier. There's little better incentive for a businessperson to respond than the promise of a summary of the survey results (by e-mail or attachment).

(A caveat or two about sending attachments: these files may be stopped in their tracks at corporate firewalls as a security measure; those that get through to your respondents may never get opened for fear of hidden macros. My virus alarm was actually set off by an Excel attachment accompanying a software associa-

tion's mailing.)

At our corporate Web site, our Guestbook form (through which we request basic demographic information) asks an "extra credit question": "If there were one thing you could do to improve your business, what would that be?" We've tried it with e-mail surveys as well. There aren't many executives who can resist this playful throwback to their dear old school days.

• At the right time: Set a deadline? Or ask for immediate reply? Our experience has been that for e-mail surveys, nearly 95 percent of the responses we're going to get (without an extra reminder nudge by e-mail or phone) are received within 48 hours. We've actually received responses to short, four-to-six-question e-mailed surveys in as little as 10 minutes after sending them out.

By the way, for customer satisfaction/customer loyalty surveys, what better positive impact than to shoot off an e-mail survey soon after a sale

(or even during the life of a longer-term contract)?

• With the right vehicle: "Cold" but targeted e-mail? (That is, e-mail that's targeted to a specific person but sent without having a prior relationship or contact with that person.) Web site? Part of electronic newsletter? Mixed media? In business, one size does not always fit all.

"Cold" but targeted e-mail works fine for most, but be flexible. We've had cooperative respondents ask us to send them a fax version of the survey. They didn't want to take the time during the day and preferred filling it out on the commuter train ride home (never mind that they could have printed out the e-mail version themselves). Of course, we comply. Just be sure to include your return fax number on the document. Interestingly, we've never had someone ask if we had a Web-based version.

If you send periodic e-mailed newsletters to customers or clients who also fit your target audience, let it do double duty by including your survey. Ask that they copy and paste the survey portion into a new message rather than just hitting the "reply" button. This saves electrons and you the time it takes to wade through the non-survey material.

A word and big caution about formatting an e-mailed questionnaire. Those nicely aligned boxes and columns are not going to translate in the plain vanilla ASCII text format that many e-mail programs use as a default. Here's a way around that.

Directions: please place an X inside the brackets

Number of employees (select one)

1-10       11-20       21-40  
 41-60       61-80       81-100  
 101-200       201-400       More than 400

You can still dress up an e-mail survey. Use symbols such as asterisks or plus signs. Hyphens or underscores don't work as well visually, and be sure not to use equal signs because they translate into an awful mess. Send it to yourself and keep tweaking until it works.

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I mentioned reminder nudges earlier. Even though virtual is cool, easy, cheap and fast, we all live in the real world too. Sometimes you've just got to pick up the telephone. It's better than 50 percent effective, especially with people we already know.

You can conduct e-mail focus groups through an e-mail discussion list, using majordomo or other software. While e-mail is not exactly real-time compared with Web-based chat, it does offer a number of advantages: flexibility for those who aren't available at a set time, and typing speed is not a factor. Onelist is a free service that allows you to create your own list or join a current one. It boasts of more than 17 million daily e-mail exchanges. Check it out at [www.onelist.com](http://www.onelist.com).

- To get the right results: Confidence level and validity. It's important to understand that the on-line population is a segment, it is not the total population in most cases. There is real danger in trying to extrapolate to the whole of the segment what is just the on-line portion, i.e., food processors who are also wired.

Another caveat: there is still a sizable population of middle-aged executives with e-mail addresses who never touch the keyboard. Their secretaries print out important e-mails for dictated replies to be typed and sent. Sometimes this is not relevant, but oftentimes it is. This is why I like posting to discussion groups or contacting active participants privately. At least I know the respondents aren't hiding behind secretarial skirts (or trousers). So, depending upon your need to apply your findings to the entire population, both wired and not-yet, you may want to incorporate traditional processes in your survey mix.

One of the reported drawbacks of e-mail surveys compared with Web versions is that transferring the data for analysis is a far more tedious process. Working with e-mail responses does take a few more steps, but it's not nearly as labor-intensive or prone to key-stroke error as working with paper. You can individually copy and

paste each data element of every response into a spreadsheet or relational database, but that's still a lot of work.


Here's what we do. We set up a new mailbox and create filters in our e-mail program (Eudora Pro, Version 4.1) so all incoming surveys automatically transfer into that mailbox. Once the targeted number of replies are received, we open the entire mailbox in a spreadsheet program such as Excel or Quattro Pro. The next step is to create a title and column headings for each data point. We then highlight and delete the rows with the headers and other non-relevant data for each record.

For "select one" questions in a row format (as in the "number of employees" example above), delete all options other than the one selected. Now, highlight each record and select the "switch columns and rows" to align the responses to fit under the correct column heading. The data can now be sorted or the spreadsheet can

be saved in comma-delimited form for exporting into a relational database (already set up with matching column headings and data type).

This process will not work as easily for "check as many as apply" questions. You will need to work with those questions separately, placing the multiple responses in the appropriate column, directly under each other. You will also need to create your database with multiple tables, linked in a "one-to-many" format and then copy and paste the responses into each appropriate table or into a main/subform template.

### Pleasantly surprised

All in all, e-mail surveys are more of a do-it-yourself, quick-and-dirty means of conducting business-to-business market research. When your need to know is urgent and number you are surveying is small, give the guerrilla app a try. Dollar for dollar and hour for hour, you'll be pleasantly surprised. 

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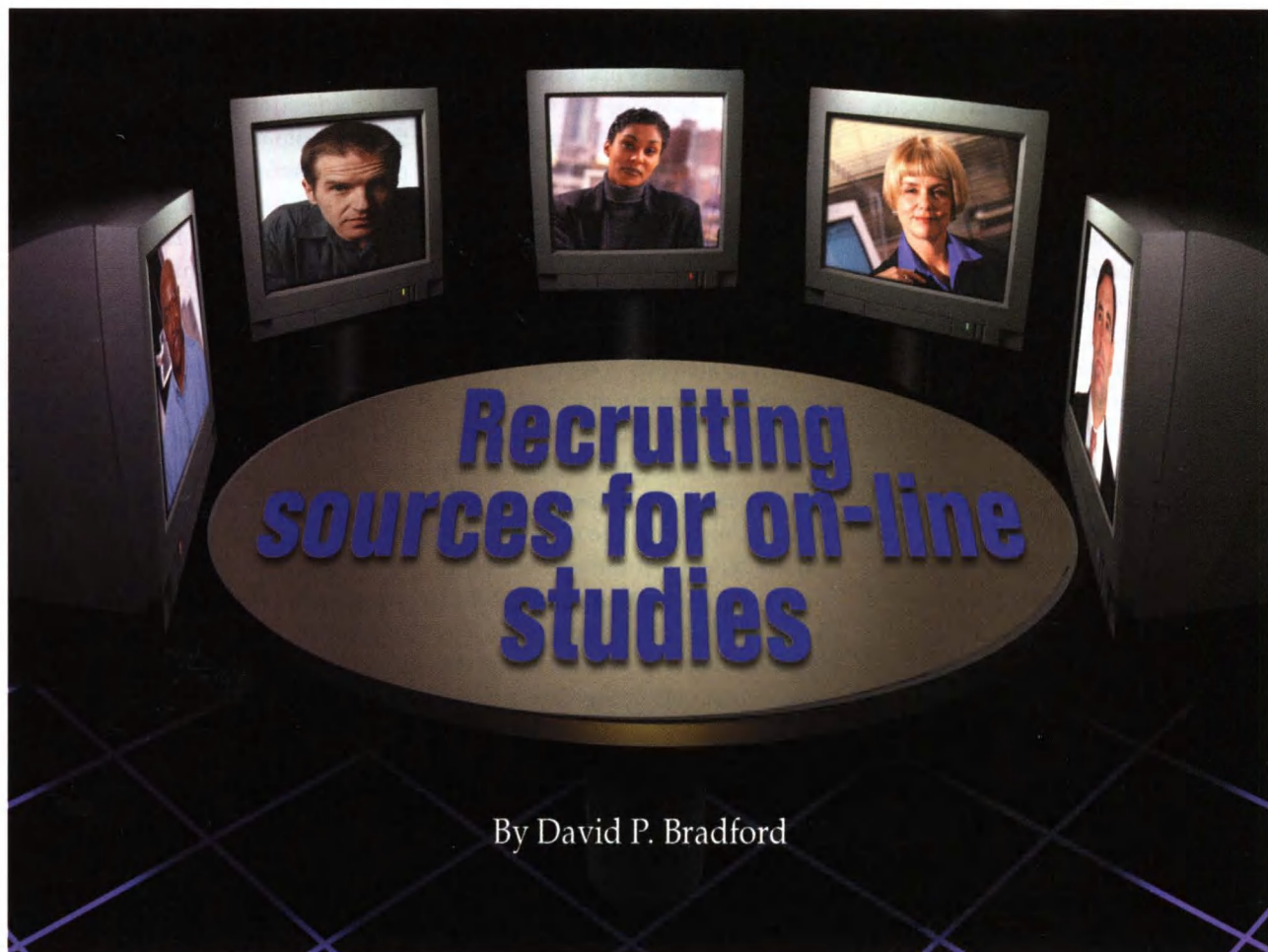
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By David P. Bradford

*Editor's note: David Bradford is vice president/director of VRROOM, the Virtual Research Room, a New York-based provider of on-line qualitative market research resources. He can be reached at 212-390-5633 or at [dbradford@vrroom.com](mailto:dbradford@vrroom.com).*

The growth of Internet usage, combined with technological advancements, has resulted in a rich source for highly targeted market research subjects. Recruiting for on-line studies has become more sophisticated and diversified than the options available in the early days of Internet-based market research. Recruiting for on-line studies using the variety of options available is not recommended for those unwilling to devote the resources required. The choices available include recruited panels, opt-in e-

mail list rentals, numerous Web-based incentive marketing programs, random intercepts of Web site visitors, and Web sites that have collected personal information from their users.

There are advantages and disadvantages to each method of recruiting which determine how appropriate they are for each study.

- Panels recruited for market research. In the early days of Internet recruiting, panels were created using Web-based advertising, or postings, that offered compensation for participation in on-line studies. This method allowed a market research firm to build large pools of individuals available to respond quickly to the demands of on-line market research.

It soon proved that these specially constructed panels had certain drawbacks. Advertising to recruit the panel

and a system to collect, store, and update this information were unavoidable expenses. To keep the panel members satisfied, it was essential to provide them with enough studies, or they were likely to drop out of the program. Many panels experienced rapid growth, but also massive churn rates, as unmotivated prospective respondents moved on to other panels for compensation, or changed e-mail addresses. Some recruited panelists were "professional" survey takers, and would supply whatever information they thought would make them more attractive for studies. Personal Web sites and newsletters promoted these panels as a way to earn easy money.

To prevent oversensitizing panel members, it became important to limit the number or frequency of studies,



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even if it resulted in higher attrition. The use of contests offering cash awards or prizes instead of paying for a completed study helped establish a fixed incentive cost for a study. However, this reduced the numbers of people willing to participate for a chance to earn something instead of the instant gratification for their time invested.

A number of panels created specifically for market research studies exist. It is important to have a good understanding of how often they update member data, remove duplicate listings, and how it is validated for accuracy of supplied information.

- Recruiting from opt-in list rentals. As the Internet population increased, a new opportunity for recruiting emerged with widespread use of e-mail. E-mail is a powerful new way to reach the on-line user, but unsolicited e-mail, or spam, has proved to be a very negative method of recruiting. The acceptable alternative method to reach on-line users is opt-in lists of e-mail users who sign up for various

Web-based services and agree to receive selective e-mails from the provider as they register. A number of highly targeted opt-in e-mail lists are available which can provide individuals willing to participate in on-line studies. The cost to rent the list adds to the basic costs of recruiting, and may increase the time required for both screening and validation. Due to the privacy agreements associated with these lists, there are usually strict limitations on their usage, and access to personal information is restricted.

If you plan to use such a list for recruiting, investigate the company carefully, find out how long they have been doing this, and verify they are using only opt-in individuals.

- Recruiting from opt-in panels. The emergence of Internet-based loyalty marketing or incentive programs has resulted in large databases that are rich in personal information making it easy to locate highly targeted individuals. In these programs, users earn points, frequent flier mileage, credits, and other types of Internet

currency by visiting Web sites, reading targeted e-mails, and purchasing from participating sponsors. These rapidly growing, self-sustaining programs featuring built-in incentive programs are potential sources of highly targeted on-line users with multiple filtering attributes. Incentives for market research study participation can provide members with additional point-earning opportunities, and a new revenue stream for the programs. Many of these individuals would be difficult and time-consuming to recruit using other methods.

It is important to determine how reliable these database are, and how fast providers can respond for studies requiring fast turnaround. There is usually a set-up charge to use the panel, and the conversion rate for dollars to incentive points will vary widely. Another consideration is the time and effort required to establish the relationship and negotiate terms for use in market research studies. It is also more complicated to conduct longitudinal studies unless the researcher is able to capture personal information from the respondent.

- Recruiting from random Web site intercepts. A valuable way to provide research from existing Web site traffic evolved with the use of random intercept banners inviting visitors to participate in surveys. These banners pop up for the user who visits the site in a preset random pattern. This banner asks if the visitor would like to participate in a short survey. If they accept, they are linked to a page where the user fills out screening questions that can be used to identify and qualify potential respondents from existing Web site traffic. The survey has to be short since most people will not be motivated to participate without compensation. An exception to this is when the individual feels strongly enough about the subject and wants to provide their input. A number of methods exist for capturing this information on an ongoing basis for a variety of applications.

This may not be an effective way to recruit certain types of studies.

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Unless the site traffic is sufficient, it may not be possible to determine the time required to locate adequate sample sizes. It differs from placing an ongoing invitation on the site to participate in a survey, where there is not random sampling. It is also important to determine where the visitors are in a site when presenting the banner, as people come to the Web site for a variety of reasons that may be important in the design of the study.

• Recruiting using Web data capture. As Web sites grow more sophisticated and valuable for a company, an increasingly important source for individuals to study is their site's visitors. These visitors can be organized and utilized to study a variety of issues including customer service, consumer needs, customer satisfaction, proposed site redesign and developments, core customer concerns, and a multitude of others. Methods exist that will help a Web site better serve its visitors while at the same time building a variety of prospective panels for future studies. These panels will grow ever more important for companies to increase their understanding of these customers in the digital age.

#### Continue to emerge

Recruiting for on-line studies is now available from a variety of sources, and new ones will continue to emerge as the Internet grows and evolves. The purpose of a study and the type of individual attributes desired will influence the selection of sources that are available to accomplish the objectives. Validation of any on-line recruiting source and the prospective individuals it produces will remain an important consideration in on-line research. On-line recruiting requires careful planning and proper allocation of resources to be successful. More sophisticated recruiting methods and advancements in technology herald even greater opportunities for future market research studies with ever-greater numbers of potential respondents. 

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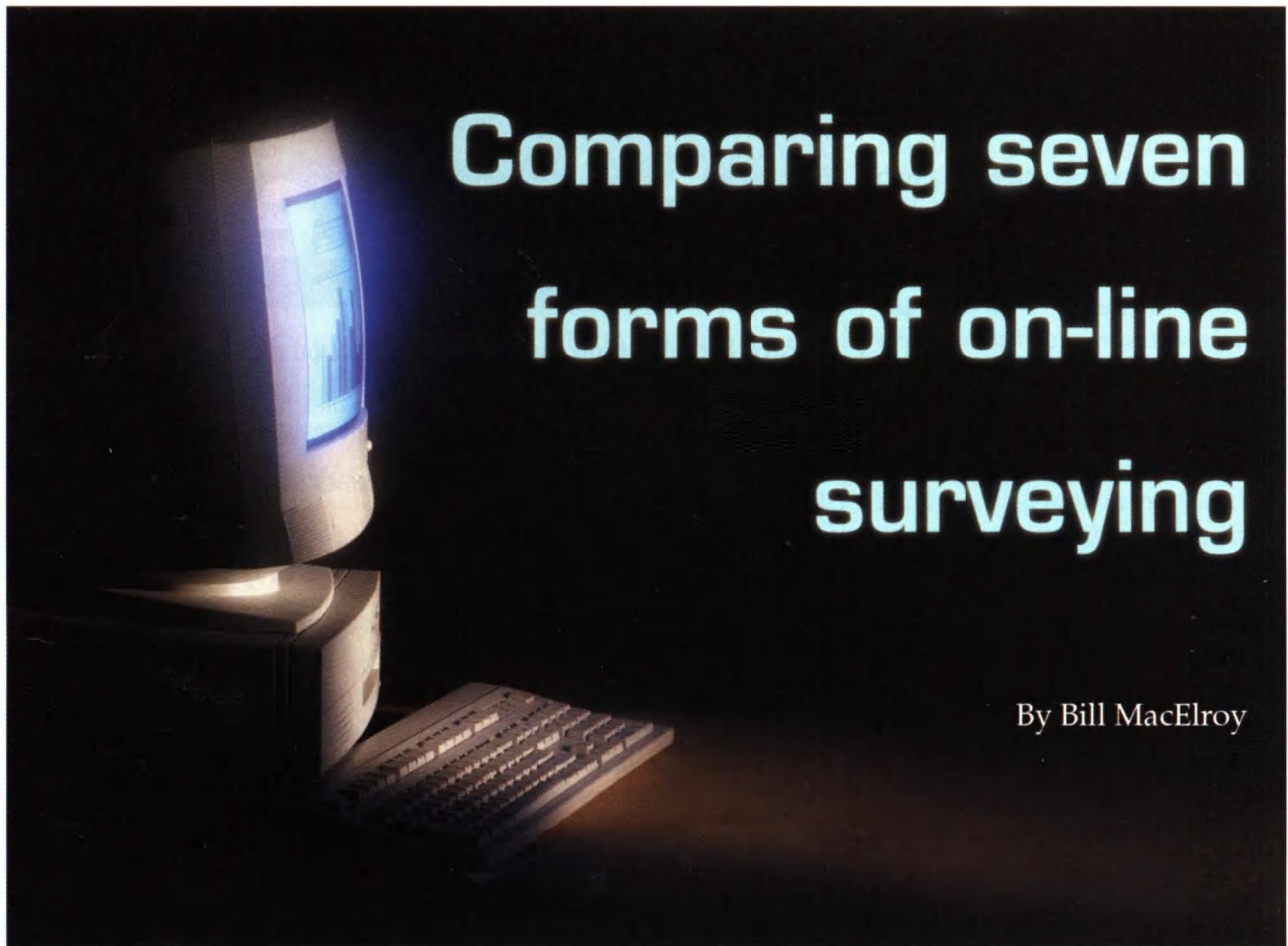
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# Comparing seven forms of on-line surveying

By Bill MacElroy

*Editor's note: Bill MacElroy is president of Socratic Technologies, Inc., a San Francisco-based research firm. He can be reached at 415-648-2802 or at bill.macelroy@sotech.com.*

**A**s the demographics of the Web inch closer to resembling those of the general population, the use of new on-line forms of marketing research is growing rapidly. With it grows the sophistication of the techniques used to conduct these studies. Unlike the early '90s, when the array of on-line survey development tools was extremely limited, many more options are now available. Researchers are now less constrained by the shortcomings of the medium and can once again concentrate on the higher value-added functions: research design and analysis of results. Better matches between the research objectives, technology and

budget are now available.

This article will describe some of the common forms of both quantitative and qualitative on-line research being used for commercial applications and will discuss specific trade-offs between research design flexibility, degree of control, relative cost and speed.

In general, there are seven current methods/technologies for conducting on-line research projects. These range from the most basic, least costly methods (e.g., text e-mail) through highly sophisticated, and relatively expensive forms:

- e-mail (text);
- bulletin boards;
- Web HTML;
- Web fixed-form interactive;
- Web customized interactive;
- downloadable surveys;
- Web-moderated interviewing: chat interviewing and other discussion formats (qualitative).

## E-mail (text)

One of the earliest methods for conducting surveys over the Internet or over a company's internal system (intranet) is the simple text-based e-mail survey. These surveys can be generally thought of as on-line paper-and-pencil surveys.

Like a traditional mail survey, there are few, if any, interactive controls or logic testing. The whole survey can be seen by the respondent at once; there is no ability to screen out unqualified or security-risk respondents during the survey. Respondents can change their answers at any point in the survey and can actually change the wording of the questions to reflect what they feel is a "better question."

Early forms of text e-mail surveys had no automated data accumulation. This meant that the researcher had to receive the e-mails, print them out and re-enter the data into standard data-



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base format. Newer software allows the researcher to encode a survey for semi-automatic data accumulation as the return e-mail is received.

On the plus side, e-mail surveys are very easy, cheap and very fast. Almost anyone can do e-mail surveys with little or no formal training. The costs are very low and the return speed is very fast. (In some cases, we've seen e-mail surveys completed and returned within 12 minutes of the initial sending.)

The ideal use of this form of on-line research seems to be for internal corporate surveys. This is primarily because these audiences tend to behave better (e.g., follow instructions, fill-in relevant information, skip questions that don't apply, not change questions, etc.) than external audiences. Even with these groups, an e-mail survey should be short (i.e., less than 20 questions). When respondents have been asked about likelihood to participate in future surveys using various on-line techniques, e-mail has the lowest rate of future participation interest. When probed for reasons as to why future participation likelihood is low, "too boring" is a frequent comment attributed to e-mail surveys.

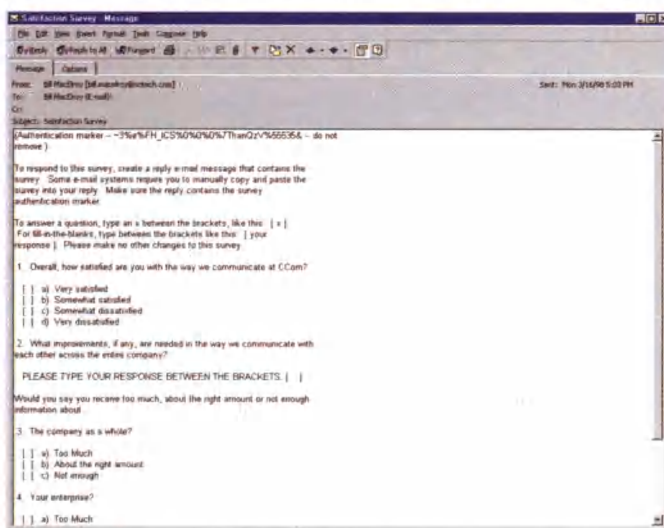
### Bulletin boards

Another on-line research form that falls into the "moderately easy, fast and inexpensive" category is bulletin board research. Bulletin board con-

ferences are useful for a "modified Delphi method" for collecting responses over time. The technique involves inviting people to a specific Web site where a discussion topic is

graphics and other visual stimuli can be incorporated in the original question, the format of the reply system is fixed and not very flexible.

This technology is very good when a panel of experts or beta testers need to post quick reactions or discuss impressions with others. The method combines elements of both quantitative and qualitative techniques and the conversational transcript provides extremely rich data. Interestingly, respondents taking on-line surveys of any type tend to give much longer verbatim comments in response to open-ended questions than traditional method survey takers.



An example of an e-mail survey. (Source: Socratic Technologies/Decisive Survey)

posted. As people respond to the question(s), others can eventually see what others have written and respond to the original responses. In this way, the thread of the conversation weaves back and forth like a slow-motion focus group.

Putting up a bulletin board is not difficult, but does take more skill than creating an e-mail survey. Unlike other forms, there is no automated data accumulation of which we are aware. Consequently, the cost of this technique is somewhat higher than e-mail — particularly due to the time needed to handle the comment transcripts and code responses for any quantitative appraisal. Although

### Web HTML

The most common form of on-line surveying is the flat HTML survey form. By our estimates, almost 80 percent of all survey data being collected on-line is being done using these forms. Almost everyone who has registered at a Web site is familiar with these types of surveys. Characteristically, these surveys take the shape of a long, single page on which the respondent clicks buttons and boxes, fills in text boxes, and eventually submits the information all at once.

The HTML form survey requires additional programming skill to capture the data upon its submission.

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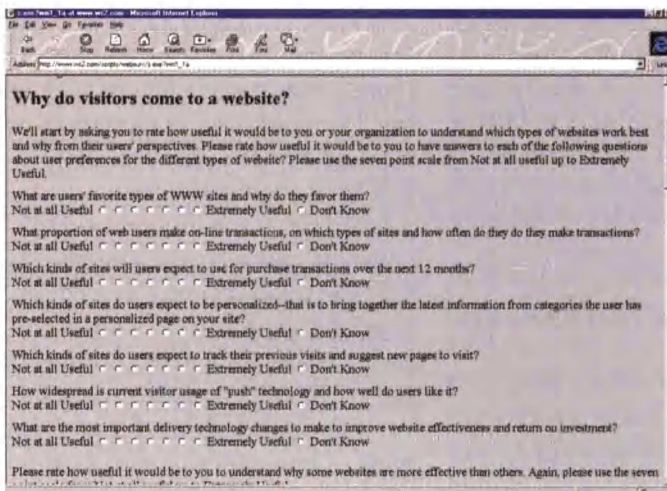
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An example of a fixed question format survey. (Source: Website Surveys & Sales)

This is usually done using CGI (a scripting-language that reads the data into a database when it is received). As an alternative, some new hybrid software packages can be used to both generate the HTML code and automate the accumulation of data upon its submission. Either of these extra steps adds to the time and cost needed to field a survey using this technique.

that can be achieved. Graphics, audio and video clips, animation and many other multimedia forms of stimuli can be used. For quick studies that don't require complex logic, the HTML form-based survey can be a faster, lower-cost alternative to more sophisticated techniques.

We find that these types of surveys are very good for user registration and profiling studies and/or for stud-

ies requiring exhibits, but no complex logic or controls.

ies requiring exhibits, but no complex logic or controls.

### Web fixed-form interactive authoring tools

Another new form of on-line research is being driven by survey authoring tools. Many of these tools have been developed from previous generations of software used to conduct computer-assisted telephone interviews (CATI) or disk-by-mail (DBM) studies. They have been adapted to "play" questions on the Web the same way they would play for an interviewer at a tele-polling station.

The big innovation is the option of allowing the individual researcher to construct highly sophisticated studies for the on-line environment. These software packages put many of the sophisticated controls that have been available for phone studies since the late '70s directly into the researchers' hands. Most of these tools exist as packaged software programs that the researcher uses on his or her own PC.

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As an alternative, several interesting new Web sites have emerged which allow the author to design the research on-line without the need for loading the design software.

The reason why these tools are referred to as "fixed format" is that they typically limit the range of options in which the survey can be displayed. Some packages have a very specific way in which each type of question must be designed and/or displayed. Others are more flexible in terms of layout, but limit the number of questions that can be displayed on each Web page. Either of these alternatives limits the design flexibility of these tools. Software in this category ranges from very easy to use (but not very powerful) to extremely powerful (but not easy to use). For now, the individual researcher will have to choose between these two problematic alternatives.

Using these tools to create the survey does not always mean that the researcher can control the whole research process. Few of these tools allow the researcher to "host" the survey they've created on their own internal servers (the equipment used to directly connect to the Internet). Most software firms will offer low-cost hosting services on their own servers, but won't (usually can't)

allow self-hosting. Of those software manufacturers that do allow self-hosting options, the cost is usually quite high (in the range of \$30,000 to \$60,000). Unless the researcher is doing 10 to 20 medium-sized surveys per year, the economics of self-hosting are usually prohibitive.

### Web customized interactive programming

The most powerful and flexible of all on-line surveying options are those that involve the custom programming skills of highly skilled technical people. They also tend to be the most expensive. Like the fixed-form tools, custom programming provides all of the modern technical controls (screening, skip-patterns, logic, error-checking, etc.), but also offers many other tricks and options that allow the researcher the highest level of flexibility currently available for design and functionality.

Flexibility in layout is one of the chief benefits of this option. Unlike fixed-form tools, question/response styles, backgrounds, graphics, etc., can be more flexibly chosen to best meet the aesthetic wishes of the researcher. There are also benefits associated with extended function-

ality such as running a live Web site for evaluation within the survey frames, running procedures such as file downloads during the survey or creating dynamic and more descriptive navigation messages.

Increased flexibility and control, however, come at the expense of time and cost. Custom designed surveys take about twice as long to program as those using fixed-form tools and can be twice as expensive as surveys authored using fixed-form tools. Time and cost can also be affected by the degree to which customizations yield complex data structures which must usually be manually tested. Hosting custom programmed surveys is almost always done on the programmers' servers.

### Downloadable surveys

Another on-line survey method attracting attention are surveys that are downloaded from the Web and run on previously installed software provided by the researcher. This shifts the computing tasks from the on-line server to the respondent's PC. Once pre-loaded, the survey software can then read much smaller files that the respondent downloads from the Internet. The result is surveys that run in a very similar manner to the fixed-form interactive surveys. Once the survey has "played" on the respondent's PC, a data file is created which can then be uploaded the next time the Internet is accessed.

Another variant of this methodology are completely custom programmed surveys that can be downloaded for single-use surveys. This technique gives the research the most control and flexibility of any option mentioned in this article — primarily because the survey can take full advantage of controls, logic and other functions available with the PC's operating system that might not be supported on the Web. Examples of this type of functionality might include time exposures or

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All downloadable studies tend to be more costly and time-intensive than other forms of on-line research. In some instances, they can also require a greater level of respondent sophistication in order to install software and correctly handle the data upload process. If the survey software must be downloaded in order to take the survey, the time requirement (from 20 minutes to two hours) may discourage some respondents. Allowing the respondent to complete the survey off-line (rather than collecting the data live) and then re-establish the data upload connection can also lead to delays and lost surveys.

Typically, we see this form of on-line research being used with panels or pre-recruited groups who regularly communicate with the survey organizer.

#### **Web moderated interviewing: chat interviews and other discussion formats (qualitative)**


The last form of research that is taking place on-line are the qualitative, real-time chat interviews. Although some people refer to these as on-line focus groups, we believe that they are significantly different in style and output to warrant a different classification.

In these chat interviews, the logic and control mechanisms are supplied by a highly skilled human moderator. People enter the interviewing chat session and then type the answers to questions posed by the moderator. While the results from traditional focus groups can be highly influenced by the skill of the moderator, these on-line chat sessions are doubly tricky. Just as the traditional moderator must control the overly enthusiastic participant, the on-line moderator must control the "tyranny of the fastest typist."

The key benefits of chat interviews are highly related to the non-physical nature of the medium. By conducting these discussions on-

line, respondents from far-flung regions can be brought quickly together with no facility or travel expense. Session moderation fees are generally higher than those for traditional focus groups (due to the increased technical skill requirements), this is usually offset, however, by the previously mentioned cost savings. Pre-recruiting non-panel participants to any form of on-line study remains as expensive as recruitment for traditional studies.

#### **Broader range**

New methods and technologies are giving researchers a much broader range of options for conducting research on-line. Expense and timing considerations can be better matched with need for controls and flexibility in questionnaire design issues. At last, the objectives of the research can be the key focus of the activity without the limitations of the medium playing a dominant role in the assessment of options. 

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# Research and the Internet: a winning combination

*A look at who's doing surveys and why*

By Beth Clarkson

*Editor's note: Beth Clarkson is a Wichita, Kan.-based independent consultant. She can be reached at 316-688-0729 or at [beth@feist.com](mailto:beth@feist.com).*

**A**s a researcher, you know how time-consuming and expensive it can be to conduct surveys. The Internet is changing that fact by providing a fast and inexpensive way to contact people with your questions

and get their responses. People answer by computer, so their responses can be automatically added to your database...no data entry hassles and no waiting. Finally, the Internet allows you to build an unprecedented amount of flexibility into your surveys. You can collect data from a broad variety of people, yet still get the kind of detailed information usually available only through

extensive pre-screening of respondents.

Of course, there are some difficulties. Aren't there always? Internet respondents may and probably do form a biased group. Therefore you can't automatically extrapolate the results to a more general population. Anonymity is harder to guarantee and a lot of people won't believe you even if you do promise it. And if you





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haven't worked with the Web before, it can be difficult to get started.

Luckily, there are ways to deal with all of these problems.

### Who's doing surveys and why

There are a variety of reasons to put a survey on the Internet. A commercial site may want to establish the demographics of those who visit in order to help sell advertising on their site. Some Web surveys are aimed at researching the potential market for a new product or service, while others are establishing whether or not current customers are satisfied.

Dr. William Hammers of the Clearwater, Kan.-based Advanced General Aviation Transport Experiment (AGATE) consortium says the organization decided on an Internet survey to conduct market research after determining that the profile of people who buy and fly airplanes and the profile of people who are on the Web are a very close match.

Drugstore.com, a Bellevue, Wash.-based Internet retailer, is using periodic surveys to stay in touch with its customers. Such surveys, says Stephen Jensen, Drugstore.com's market research manager "are a natural extension of how we would communicate with our customers. It's not as intrusive as a phone sur-

vey, it allows customers to complete the survey on their own and when it's convenient for them. It's given us some great feedback on our customers." Jensen is very pleased with the response rates of 30 to 40 percent.

Internet surveys are becoming common as more and more companies are providing computers, e-mail, and Internet access to their employees as a standard part of doing business. Many organizations are finding that such surveys are a fast and inexpensive way to reach their employees and solicit their opinions. The University of Wisconsin - Madison used eListen software from Tustin, Calif.-based Scantron to set up a survey on the workplace for its information and technology group. The Internet was considered a natural choice because everyone already had access to the Internet, so it was easy and convenient to send the invitations by e-mail.

Tara Wolfe, president of International Survey Systems (ISS), Bellingham, Wash., has a client using Internet surveys to assess the return on investment for training and evaluate the effectiveness of different courses. Because the client's employees are used to working on their computer desktops, an electronic survey

fit nicely into their flow of work.

### Hosting the survey

There are a number of problems that can come up with hosting the survey, including making sure that your survey will work with a wide variety of browsers, some of which may be quite old. One way to avoid these problems is to have a vendor host the survey. Drugstore.com chose to have Scantron host its surveys. "At some point we will move to hosting it on our site, but right now we are focused on our Web store," Jensen says.

An additional consideration for intracompany surveys is confidentiality. "People still have the same old confidentiality issues," says ISS's Wolfe. "They are probably a little more nervous about electronic surveys." Given the current publicity about privacy on the Internet, particularly when using your company computer and account, this is a realistic concern. One of the ways Wolfe decided to help her client with that issue was to host the surveys through an outside company, which helps people to feel more confident that their comments will remain confidential.

### Internet survey design

The usual steps in doing a survey are slightly different for Internet surveys. The first phase — developing the survey itself — is still there, but surveys designed for the Internet are usually a little different from those developed for other media such as pencil-and-paper. Sure, you can take a paper-and-pencil survey and load it onto the Web, but you're not taking advantage of the Internet's unique capabilities.

The administrative step is still there too, but with the right software, it's easier. Wolfe found this to be one of the key advantages of using software to develop Internet surveys. "Once the set-up and prework is done, the administration is really fast and easy compared with traditional paper and pencil. Input and analysis of results and even the distribution is so much

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easier.”

If you want to get a good response to your survey, it needs to load as quickly as possible. People won't wait; they'll move on to another Web site. Graphics and other fancy stuff increase the time it takes the survey to load. Although it's tempting to make your backgrounds beautiful, all those graphics can be a problem. What will the background and font look like on different browsers and at different font sizes? Best to choose something that will look good and load quickly no matter what kind of computer set-up the respondent has.

“Our own reaction at the beginning was to design a fairly fancy questionnaire,” says Bob Tortora, chief methodologist at The Gallup Organization. “You're much better off using a very plain questionnaire — something that looks like a mail questionnaire. When you start getting fancy, you start slowing down transmission times.”

Make it easy to respond as well. It's a lot easier to click on a response than it is to type one in. Match the entry mechanism to the question. Use radio buttons or drop-down menus for a single response, check boxes for multiple answers. It's useful to include an option for “other” responses, but few people will use it, so it needs to be supplemental, not part of your core data.

Radio buttons are best with five or fewer answers to choose from. More than that, and a drop-down menu is easier to use. For really lengthy lists with short identifiers, such as the 50 states, it's wise to allow respondents the option of typing in the two-letter abbreviation rather than forcing them to scroll through the list all the way down to Wyoming.

Make sure you're aware of any default answers. A common mistake for inexperienced Internet survey programmers is to unintentionally have the first response in a list become the default answer. This can seriously skew the results. It isn't a problem if you use survey design software that avoids such errors automatically, but if you're doing the programming yourself, you'll need to test for this

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potential flaw.

### Advantages of Internet surveys

Internet surveys have some real advantages over other methods of collecting data, particularly with regard to interactive branching. Such branching allows you to target the questions, or even which survey the respondent receives, based on the answers they give to earlier questions.

The survey I developed for the AGATE consortium presents pilots, former pilots, and potential pilots each with a different set of questions. Such branching is transparent to the respondent. They answer a question at the beginning regarding their experience and desire to be a pilot and thereafter they only see the questions that are applicable to them.

ISS is using 60 different surveys in one current project. "Each of those surveys is customized for the course taken," Wolfe says. "It's very easy to do a lot of customization and not as confusing to administer that volume of surveys. If a person responds with option A on particular question, the software allows you to open up a different set of questions. It's really user-friendly for the respondents."

How easy it is to do such branching depends on the software you are using. Some programs can't do interactive branching. You can program branching logic for a survey in Java (this is what the AGATE team did) but it may require a considerable amount of time and effort to do so.

Another technique developed for

the Internet is to use random numbers to present each respondent with a particular subset of questions rather than expecting each person to answer all questions. It allows the surveyor to collect a large amount of information without burdening respondents with excessively long questionnaires.

This technique is particularly useful in determining prices. Given a selection of prices and asked "What would you pay?", people typically give answers at the low end of the price range. A yes/no question about a specific price, while more accurate, only yields information about that particular price. By using random numbers to present each survey respondent with a specific price, and asking if they would pay that much, you can build a pricing curve for the market potential of the product or service by looking at the percentage of positive responses at each amount.

The AGATE survey at <http://apats.org/> uses a combination of such techniques to tailor the questions presented to each survey taker. The result is that, while the survey comprises over 100 questions, no one person sees more than a few dozen. "It's very efficient for people to take the survey," says Hammers, "yet we gather a large amount of data."

Internet surveys virtually eliminate data entry. Responses can go directly into your database. Essentially, the people taking the survey are performing the data entry task for you, including typing in any text responses.

Because users are putting their data

directly into a computer, the answers can be automatically checked for validity. You can make sure that a particular question has been answered if that data is crucial, or check to make sure that the response falls within pre-defined values. While you can't screen out all errors, you can eliminate a great many, up front. If the respondent has neglected to answer a key question, the program can let them know and they can make a correction on the spot.

You can program your survey to be available in a variety of languages if you feel that the application warrants it. Some programs will facilitate this and allow you to store phrases that are used regularly in your surveys. Of course there are Internet tools which allow users to translate Web pages into their native tongue if necessary, although the automatic translators do sometimes come up with some interesting interpretations.

Explanations and graphics can be integrated into your survey without detracting from the overall flow. This can help confused respondents understand questions, terminology, and literally see what you mean. On the other hand, since those explanations are only accessed when needed, those who don't need them are not distracted or slowed down by having to read through definitions of terms they are already familiar with.

### Biased results

Biased results are the most potentially devastating problem associated

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with Internet surveys. They can be handled, but the expense and effort involved with the survey rises. However, in a lot of cases, it simply isn't an issue. A survey that's placed on the Web in order to receive feedback from Web site customers, such as the ones that Drugstore.com is running, is an example of such a situation.

In other situations, it may be acceptable if the demographics of the Web are close to the demographics of the people you're trying to reach, such as for the AGATE survey. It was felt that the data collected would lead to good insights regarding the potential market and the skewed demographics could be corrected by using statistical techniques to weight the actual responses to bring them in line with the demographics of the population at large.

If you do need scientifically accurate results, it is possible to obtain them, but the costs go up considerably. Gallup is meticulous in its use of

the Internet in order to guarantee the authenticity and scientific validity of their results. The company first qualifies all respondents with a short phone interview. After that, the qualified recruits are sent a letter with the site address and a personal identification number (PIN). The firm also sends them \$5 cash for completing the survey. All of that is done to increase the response rate. Using the PIN, Gallup can determine who hasn't completed the survey. After two weeks, they receive an e-mail reminder. If they stopped before completing it, they can log back on and finish.

An internal corporate survey may or may not be appropriate to place on the Web, depending both on the company and the employees being surveyed. Boeing Company, for example, has used the Internet for surveys designed for managers and professional workers who are provided with computers and Internet accounts by the company, but when surveying fac-

tory floor employees who may not have the access and equipment, the more traditional pencil and paper methodology prevails.

#### A matter of time

If you're not using the Internet to conduct surveys yet, it's only a matter of time. While the Internet will never entirely replace the more traditional forms of communication, for surveys or anything else, if you plan on doing market research in the future, you need to be looking into how to make use of the Internet now. Sure, problems exist, but that's true with every methodology. The problems can be dealt with.

The combination of access, convenience, and low cost give the Internet some major advantages in collecting information. Add to that the flexibility and ease of use that can be programmed into Internet surveys and it's a winning combination for market researchers. **TM**

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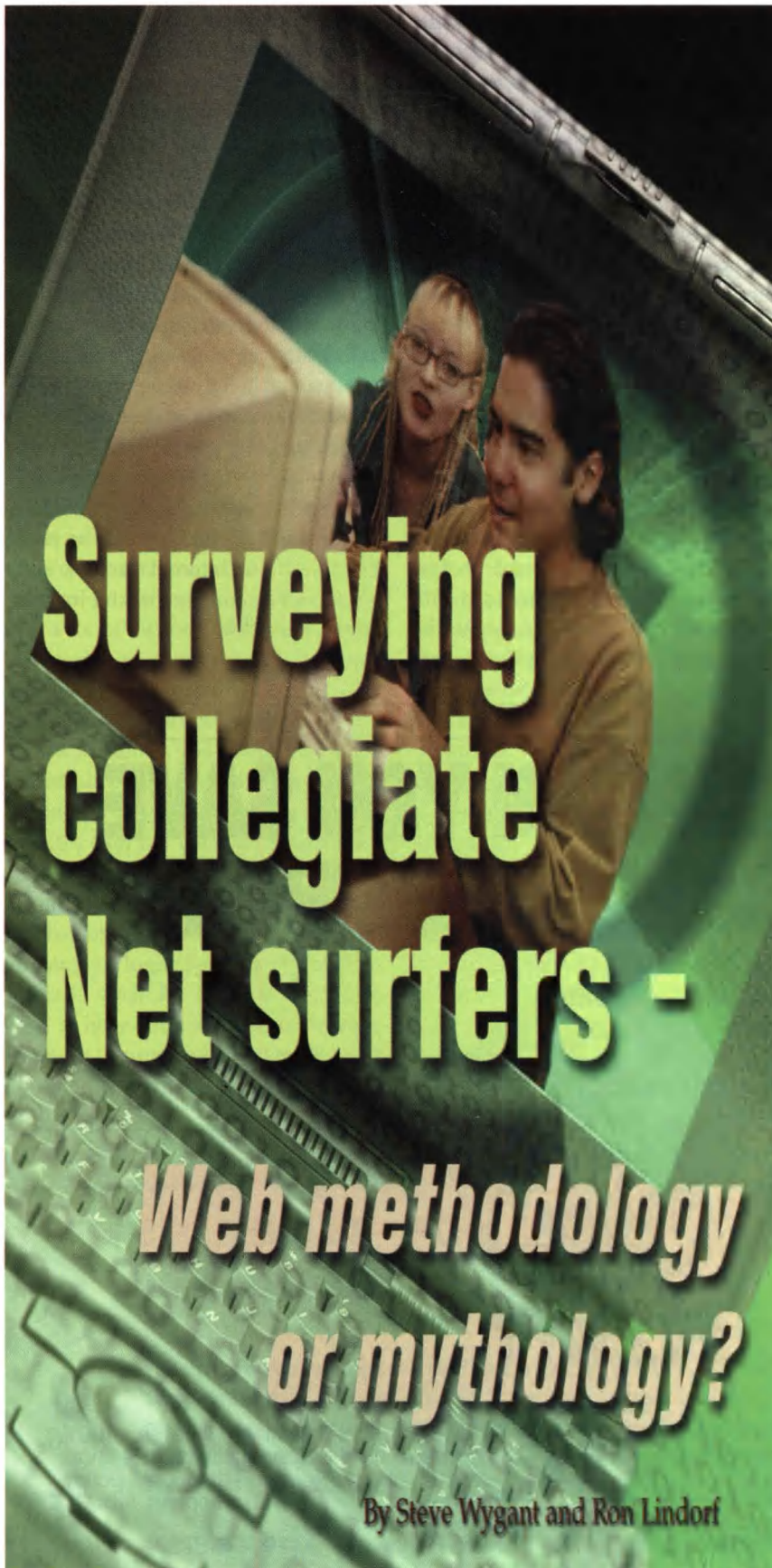
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# Surveying collegiate Net surfers -

## Web methodology or mythology?

By Steve Wygant and Ron Lindorf

*Editor's note: Steve Wygant works in the assessment office of Brigham Young University in Provo, Utah, teaches research methods at BYU, and consults on Web/e-mail research methodologies for clients of Western Wats Center, a Provo-based data collection and processing company. Ron Lindorf is president of Western Wats Center.*

**W**hen Yahoo! released its list of Most-Wired Colleges in May 1999, one university in Utah pushed the top of the national list. Brigham Young University (BYU) shines as an example of network infrastructure. The majority of its dorm rooms are wired and two-thirds of its on-campus computers are available 24 hours a day for its nearly 30,000 students. The unprecedented access to this highly wired and relatively stable population of 18-24-year-olds allowed researchers to investigate some of the most hotly debated topics in the emerging arena of Internet research. What they found about response rates, turnaround times and data validity might surprise you.

There is no question that data collection via the Internet has been gaining popularity, yet no one seems completely sure what to make of data gathered using the Web. Harris Black and a handful of other industry leaders have staked their future on Web surveying, but other market researchers are more cautious in their approach to Web surveying methodology. It isn't the degree of difficulty — gathering data via the Internet is technologically easier than traditional methods. The most heated debate rises around validity — are data gathered via Web sites as valid as data gathered through more traditional means? Are self-selection biases and other sampling errors introduced by collecting data in a self-





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administered, electronic venue? Can the projectability of data gathered this way be trusted?

Last October, researchers in BYU's assessment office set out to test some

boxes and a self-addressed, postage-paid return envelope.

## Web versus mail respondents

The demographic data gathered

Table 1 - Respondent Demographics	Web	Mail
Percent male	39%	34%
Percent female	61	66
Age	18.5	18.6
Rating of comfort using computers (1-7 scale)	5.8	5.6
Hours using a computer per week	10.9	9.4

of these issues. By conducting a split-method survey of the school's on-campus residents, they were able to test the impacts of two different meth-

show some interesting differences between the two respondent groups. Both samples included a greater proportion of females, reflecting the

Table 2	Electronic	Mail
N (sent out)	1,270	1,299
Returns	629	410
Response rate (Final)	50%	32%
Days elapsed until 80% of final response total was received	2	22

ods of data collection on self-selection and sampling bias. Identical questionnaires were constructed, one electronic and the other on paper. The questionnaires were split randomly between electronic and mail administrations and sent to 2,600 BYU dor-

same proportions found in campus housing in general. However, a slightly higher proportion of males returned the survey in the electronic mode than the paper mode, suggesting a greater likelihood for 18-24-age males to respond to a survey elec-

Table 3	Electronic	Mail
Percent responding to all four open-ended items	93%	93%
Average words per response to open-end items	31.1	22.1

mitory residents. All potential respondents had both private university-provided post office boxes and e-mail accounts. Respondents in the electronic sub-sample received an e-mail invitation to complete the questionnaire, with an embedded hyperlink that, when selected, linked immediately to the Web-site containing the questionnaire. Respondents in the paper-pencil sample received the standard printed invitation letter and questionnaire in their campus mail-

tronically. Interestingly, while students who responded via the Web or mail report similar levels of comfort using computers, students who responded electronically report using the computer about an hour-and-a-half more per week than their paper-pencil counterparts. This might suggest that those who are heavier computer users are more likely to answer an electronically administered survey. However, it more likely reflects the greater proportion of male respon-



dents (who reported more hours of computer usage) in the Web sample.

### Benefits of Internet-administered surveys

On analysis, several definite benefits to Web-administered surveys emerged. Of particular interest is the response rate, the turnaround time, and the open-end quantity.

- Response rates. As shown in Table 2, a significantly greater portion of respondents completed the questionnaire via the Internet. Of 1,270 respondents solicited via e-mail, almost 50 percent (629) returned the survey. The numbers were significantly lower for the mail-out group, only 32 percent (410 of 1,299) of respondents returned the questionnaire. Findings prove that Web-based surveys are convenient for the respondent as well as the researcher.

- Turnaround time. While 80 percent of the total Web surveys returned were done so within two days, it took 22 days to reach the same sample penetration point in the self-administered paper-pencil format! Furthermore, the electronic methodology returned an abundant 64 percent more completed questionnaires than via the mail method (see Table 2).

- Beefier open-ends. As shown in Table 3, the same percentage of respondents in the two groups answered all four open-ended items on the survey (93 percent). However, the total open-end word count on the Web questionnaire averaged almost 50 percent higher than those from the paper-pencil group! For researchers who are constantly battling to get more verbatim information using self-administered questionnaires, Web-based administration may provide this additional benefit.

### Checking data validity

Of course, none of the practical benefits of electronic data collection would mean much if the data from an

electronically administered survey were of questionable validity. To this end, researchers analyzed the mean responses from the Web-administered questionnaires with those from the mailed surveys. Comparison of responses to the closed-ended items between the two methodologies revealed nearly identical patterns and the study methodology was not shown to influence responses in any way. Therefore, for this population, data from an electronically adminis-

tered version of the survey has high projectability across the study population.

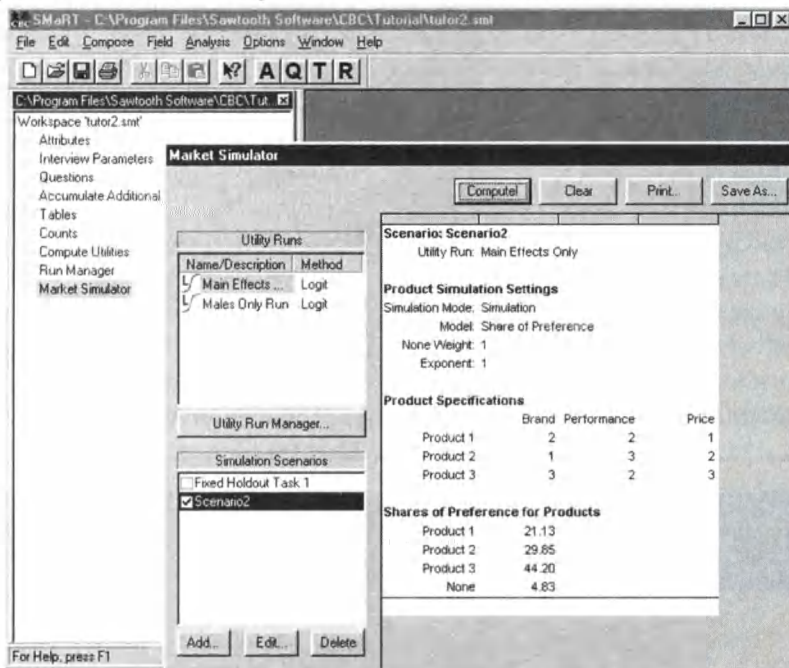
### Conclusions for research practitioners

Several compelling benefits of using electronic data collection methods to gather data from an 18-24-year-old, computer-conversant and educated population, are apparent for astute research practitioners.

- Immediacy: Using this e-

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mail/Web-based approach, researchers at BYU have been able to provide near real-time data for last-minute information needs and for major policy decisions within just a day or two of request. Recovering 80 percent of response data within two days could become the client benchmark for data delivery in the near future.

- **Response rates:** Response rates for survey research are of course dependent on many more factors than mode of data collection. Instrument length, sample characteristics and interest in topic all affect how willing people are to respond. However, the higher response rate in this matched sample suggests the potential for a powerful benefit from electronic data collection.

- **Cost reduction:** Make no mistake, there is substantial initial investment in setting up shop to collect survey data electronically. Software purchase or development, server acquisition and maintenance and technical staffing are all significant expenses. However, over the long run electronic data collection seems more cost effective — in this case, total estimated project costs for the electronic administration were approximate-

ly one-sixth the cost of the mail administration.


- **Project execution:** E-mail recruitment and Web-based data collection has allowed a small assessment team to cover a lot of ground in a short time. From June 1998 through May 1999, two full-time researchers have conducted 27 electronically-administered survey projects, from instrument design through data analysis. In this 12-month time span, they have delivered a combined total of over 50,000 questionnaires to a wired population 35,000 students, faculty and staff, and completed data analysis and reporting of over 12,000 respondents; with a staff of two, and a minimal budget to match!

For market researchers, this is a comparative study among a narrow but important segment of Web users, with an arguably dated, yet proven technology — mail surveys. But hasn't the Web in recent years been made up of highly fragmented and pre-disposed sets of people, be they home computer owners, the highly educated, slightly more male, etc.? Census Bureau and Harris Black figures suggest that the population of Internet users is becoming increasingly similar to the rest of the coun-

try. As demographics of Web users are found more truly representative of the American population, smart researchers will take advantage of Web research to provide timely

**Census Bureau and Harris Black figures suggest that the population of Internet users is becoming increasingly similar to the rest of the country**

information inexpensively to their clients.

The results of this BYU study show that research practitioners can have increasing confidence in their cyberspace data collection, at least for those target audiences on the Web that can be identified and reached electronically. Coupled with some of the practical advantages to Web research — at least compared to Pony Express mail methods — greater confidence in the validity of data might mean researchers can have their cake and eat it too. 

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# Of browsers and plug-ins

## Researching Web surfers' technological capabilities

By Chris Grecco and Hal King

*Editor's note: Chris Grecco is director, quantitative & Internet research, and Hal King is managing partner, at King, Brown & Partners, a San Francisco-based full-service research firm. Grecco can be reached at 606-335-1006 or at [chris@king-brown.com](mailto:chris@king-brown.com). King can be reached at 415-512-1040 or at [hal@king-brown.com](mailto:hal@king-brown.com).*

Industry analysts estimate that more than a third of U.S. households currently have and use an Internet connection. When home penetration is added to work-based access, at least half the adults in America use the Internet on a regular (daily or weekly) basis for a growing variety of information communications, entertainment, and transaction purposes. The Internet is now much more pervasive than televisions or telephones

were at a similar stage in their development, and is clearly becoming much more of a part of people's daily lives than could have ever been imagined by its inventors.

Until recently, much of the Internet's appeal has been based solely on e-mail communication and searches for personal and professional information. Indeed, many people only use the Internet to receive and send e-mail. For example, AOL's chat rooms are among the most popular of its many services. Our own Web usage surveys now find "personal research" as a leading application of the Internet. Increasingly, the Internet is used as source of "pre-transaction" information to discover details about products and services even when the actual purchase is made through traditional distribution channels. However, using the Internet routine-

ly for broad scale e-commerce and entertainment purposes still lags information and communication applications for important reasons.

While the Internet — and specifically the Web — has held the promise of delivering highly interactive multimedia content, until recently these widely publicized benefits were simply not available because of reliability, bandwidth, privacy, and security constraints. Even though leading-edge Web sites began delivering audio and video files three or four years ago, including on-line gaming and music "channels," most Internet users did not have fast enough modems or pipelines to have realistic access to this rich multimedia content. What Web designers and developers discovered is that no matter how cool or interesting a digitized two-minute video clip might be, most



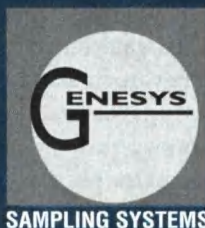
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mainstream users were loath to wait an hour or two for downloading.

### Playing with fat pipes

Now, cable, telephone, and other communications companies are ramping up to deliver new transport technologies as quickly as possible. Their aim is to provide Internet users with the richest experience possible — a full VDV (voice, data, and video) Monty. In the coming years, more and more people will subscribe to high-speed cable modem services like @Home and Road Runner or telephone based services like DSL, joining businesses and institutions that have dedicated Internet connections through high capacity T1 or T3 lines.

All of this is especially important as we consider the changing composition of the Internet audience. While these high-speed services will certainly be of interest to current users, they will also be important in bringing the next wave of customers to the Internet. Today's Web surfers have

accrued their experience using personal computers at work and at home, but most of those who initiate access in next few years will be PC novices at best. Many others may not use PCs at all and instead will employ any of a number of alternative devices like WebTV, Worldgate, or gaming platforms like Sega's new Dreamcast to access the Web.

### Multimedia research needs

High-speed access will necessitate a substantial reconfiguration of the Internet's content. Multimedia files will certainly become much larger and more complex. Currently hundreds of companies provide special software or browser plug-ins that allow Internet users to access any number of advanced applications like large audio and video files, 3D graphics, and streaming media. In most cases, plug-ins must be downloaded and installed before certain multimedia and graphics files can be viewed or heard. An increasing number of

standard plug-ins are already included with the latest versions of Web browsers, such as Microsoft's Internet Explorer or Netscape's Communicator.

Keeping track of plug-ins is a job in itself. The number of choices has literally exploded, as have sites where they can be obtained. Netscape lists more than 200 in its browser plug-in download area.

As bandwidth and available media options continue to increase, it becomes even more important for companies of various types to understand what multimedia capability users have. Further, companies will need to know how the needs and motivations of Internet use affects how sophisticated users' multimedia capabilities are.

Examples of companies that need information on users' plug-in capabilities include:

Portals and directory sites — Web sites that accept advertising from many different clients need to know what kinds of multimedia ads they should be willing to accept since they will not be able to accept all formats.

Web advertisers — companies that use the Web as an advertising medium need to know what multimedia formats can be seen and heard by users so they can distribute resources and efforts accordingly.

Content providers — Web sites that provide content to users need to know what types of audio, video, and streaming media their site users can access.

Browser companies — companies like Netscape and Microsoft need information about what the most popular multimedia applications are so they can make decisions about which plug-ins to include with their browsers and which to offer as separate downloads.

### Users don't know

Our company, King, Brown & Partners, has been conducting on-line surveys for three years, and many of our projects have focused on helping Web sites and Web content providers

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understand who is visiting their site, how satisfied they are with the content, and how the content could be improved. In addition to needing demographic characteristics for crosstabular or audience segmentation purposes, many sites would like to know details about how users are accessing their sites. Thus, we have been asking questions about modem speed, browsers, and types of plug-ins users have installed.

In many cases, the results of these inquiries have been less than satisfactory since most users simply don't know or care about the internals of their Web browsing software. In many of the studies we conduct for Web sites, "Don't Know" or non-response is in the range of 30 to 40 percent for these configuration questions. Trying to obtain detailed and accurate plug-in information is especially difficult since even sophisticated users rarely remember which plug-ins they have downloaded or know which came pre-installed with their browsers. Further still, obtaining information on which versions of browser or plug-in software is virtually impossible. Even people who know their browser brand (i.e., Netscape or MS Internet Explorer) have little idea of its vintage. Many assume they are using the most up-to-date browser because they have a fairly new computer. What they don't realize is that new browser versions can be released several times a year.

To obtain more accurate and actionable information about plug-in use, we have worked with clients and outside programmers to devise new ways to obtain important configuration data. The following are a couple of examples of our new approaches.

#### **Example 1: obtaining active information - taking the plug-in test**

King, Brown was approached by a client that wanted to know what proportion of Internet users could use various multimedia plug-ins and needed to be able to compare that

information against several demographic and behavioral characteristics.

Because of the dismal response levels we experienced in asking detailed plug-in configuration questions, we decided to structure the questionnaire as an on-line multimedia test. Web-based survey pages were created using a series of selected images in a broad range of plug-in file formats for the test. After giving the page a few seconds to load, users were asked

to answer a very simple yes-or-no question: Can you see an image? In this way, users who could see the image after it loaded clicked "yes"; those who could not see the image clicked "no" without ever having to know or report any technical details about their browser's configuration.

After each response, the site visitors were moved automatically to the next question, that is, the next plug-in test. Because browsers notify users if they do not have a plug-in installed

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to play a certain multimedia file, the survey programming included detailed instructions so that respondents would not download the media players they needed, to ensure an accurate determination of what capabilities were actually installed.

We also experienced some of the highest survey completion rates that we had ever seen. Clearly, viewing the plug-in images made the survey much more entertaining and interesting, helping to accelerate response rates.

### Example 2: Obtaining information passively

Much of our Web-based research is used to build behavioral profiles that help determine the utility and appeal of site content, as well as navigation and performance reactions. When this information is combined with other assessments, we are able to provide our clients the resources for creating useful "knowledge bases" about site visitors' interests, usage motivations,

and overall satisfaction. When that learning is matched with demographic descriptors, a much more complete picture of a site's appeal can be developed.

We have now begun to apply and refine a process that goes well beyond collecting data by just using a Web survey. Depending on how they are programmed, Web servers can pull information from users' browsers when they visit a site. Browsers can reveal important and useful information about how a site is being used. When a user visits a Web site, properly programmed sites can determine user information such as which Web browser and version they are using and which, if any, plug-ins they have installed.

We have used a process that will "poll" survey respondents' browsers when they enter our survey and will attach information about their browsers and plug-ins to their individual survey data files. Attaching this information allows us to obtain


information on multimedia use for frequency and crosstabular purposes without having to worry about whether respondents know which browser or plug-ins they currently have installed. In addition to the increased accuracy, collecting this usage data then becomes a continuous process, rather than a random event. We believe that fully half the value of Web site market research is revealed in analysis of trends, for which this information is a key contributor.

### Looking forward

We used to be more cautious about forecasting the rate of technology innovation, but Web capabilities have continued to develop at an astounding pace. Still, the speed of innovation far exceeds adoption rates, especially since nascent technologies are often expensive and unstable. In the near future, high-speed Internet connections and server-based software capabilities will sharply reduce reliance on users to download and install new resources. Automated updates will certainly become pervasive as Web marketers build more substantial franchises that rely upon sophisticated multimedia delivery systems.

The rudimentary nature of Web-based market research is also destined to change in response to these new capabilities. Researchers will need to be as creative and informed about Web technologies as their clients in order to provide pacing market intelligence.



In our practice, Web designers and developers are moving from project-based outsource relationships to full-time staff members. In the near future, we expect to deploy fully instrumented servers that can be used as real-time, interactive laboratories to test all or part of a client site. Market research has been criticized as being too expensive, slow and difficult to apply. We expect that the Internet will allow firms to finally deliver timely, high-quality, and low-cost market information. **TM**



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# 5% of consumers account for most surveys

*"The research industry may be burning out the small fraction of heavy responders" (JMR). In-store research provides ready access to the rest of the population.*

By Herb Sorensen

*Editor's note: Dr. Sorensen has been a market research consultant since 1972. His firm, Sorensen Associates Inc, specializes in in-store research.*

A recent study in the *Journal of Marketing Research* (May 1999) shows that "a small percentage of the population is completing the majority of surveys."

Refusal of consumers to participate in surveys has been a major and growing problem for the research industry. In *Marketing Research* (Spring 1998), Bearden says that the pool of qualified respondents is drying up: "Lack of representativeness resulting from refusals to participate jeopardizes the accuracy of survey results. Evidence suggests that the decline in participation rates is already occurring and may accelerate."

This same concern was addressed by Brooks in *Marketing News* (June 8, 1998): "Consumer cooperation with surveys is critical to the accuracy and credibility of market research data, and the refusal rate continues to climb. Yet, no one's really complaining about it. No one's losing business over it, so we all continue to pretend it isn't happening."

What to do?

**The CMOR PR approach.** The Council for Marketing and Opinion Research (CMOR) is undertaking a major initiative to increase consumers' understanding of research and their willingness to participate. There is both a PR component, trying to convince consumers that what we are doing is good for them; and an improvement component, trying to make what we do more palatable to the consumer. It is suggested that all quantitative surveys include a final standard "satisfaction" question. This will be an aid in assessing the "respondent-friendliness" of studies, which may then be correlated with survey characteristics like time, topic, location, etc.

**The "already there" approach.** Is there a method that already receives a high response rate from basically "virgin" respondents? In-store surveys as optimized by Sorensen Associates receive about a 50% initial cooperation rate, vs. about 5% for similar studies in malls. This indicates a ten times greater sampling penetration for supermarkets vs. other research milieus. (For shoppers receiving products for in-home evaluation, the response rate is typically 80-90% for this second phase.)

Why are shoppers more receptive to interviews in-store? Survey questions make more sense to consumers in terms

of what they themselves are thinking about at the time - RELEVANCE! And Sorensen's shopper-friendly questionnaires are introduced to store patrons by "Consumer Relations Specialists," interviewers specially trained for the retail environment.

Many researchers consider in-store methods only when they need access to store shelves for purchase behavior, category management, etc. However, 75% of Sorensen's in-store research (concept tests, home use tests and other consumer focussed research) is done solely to reach high quality respondents, quickly and efficiently.



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# Integrating market research into the Web site development process

By Jeff Rosenblum

*Editor's note: Jeff Rosenblum is a partner in Questus New Media, a Sausalito, Calif.-based interactive marketing agency. He can be reached at 415-339-2710 or at jeff@questus.com.*

**O**n the Internet, as in any other area of business, to compete successfully, you must exploit every available competitive advantage. One way to do this is by using the strategic guidance generated by researching your target audience.

In helping our clients develop their Web sites and strategies, our firm, Questus, typically uses a multi-phase approach to integrating market research. It starts with building a broad understanding of the target audience's perceptions of the overall site concept. We then focus on more granular issues, such as feature development and interface design. The methodologies typically used are as follows (in chronological order):

- Focus group exploration: used to generate responses to a site's overall

concept, features, content, brand identity and interface designs.

- Quantitative measurement: used to obtain projectable data that assists in market sizing, audience segmenting, feature set development, interface design and site marketing.

- Usability testing: used to identify ways to make the site easier to use by modifying the its graphics, icons, layout and terminology.

- On-site surveys and proprietary panels: used to provide ongoing feedback after a site is up and running.



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# Concept Development



A multi-phase research approach is ideal for assisting Web site development.

The development of a new Web site concept typically begins with a focus group exploration. Focus groups are a highly effective tool for assessing a target audience's overall perceptions of a site and identifying ways to refine the concept to meet their needs.

Using storyboards and interactive demonstrations when demonstrating a new site concept gives focus group respondents a tangible understanding of the site's overall content and objectives. For example, while recently developing a new e-commerce site, our firm surfed the Web with respondents and had them use competitive Web sites. Then, a prototype Web site was used to demonstrate the prospective new site. Using this stimulus, we were able to identify on-line

shoppers' unfulfilled needs and understand what features will meet those needs.

In this project, as with most focus group explorations, the primary areas that were explored included:

- assessing the audience's interest in using the site;
- understanding needs that competitive sites are not currently fulfilling;
- identifying barriers to using the site and understanding how to break down the barriers;
- generating responses to interface designs;
- obtaining input into site marketing and branding.

## Overview of pre-launch quantitative surveys

After conducting the initial focus group exploration, it is necessary to measure issues that were exposed, but not quantified in the focus groups. For example, in the series of recently completed focus groups, respondents suggested eight good ideas for site features, but the site only had enough time to initially launch three major new features. Using on-line quantitative surveys, Questus generated detailed feedback from thousands of on-line shoppers from around the country. This input was used to measure which three features were most appropriate for the site's launch.

To get respondents for the survey, we worked with OnlineSurveys.com, an on-line research panel comprised of respondents from virtually any target audience. By speaking with a statisti-



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cally valid number of respondents, it was feasible to make strategic decisions with confidence that they were consistent with prospective users' preferences.

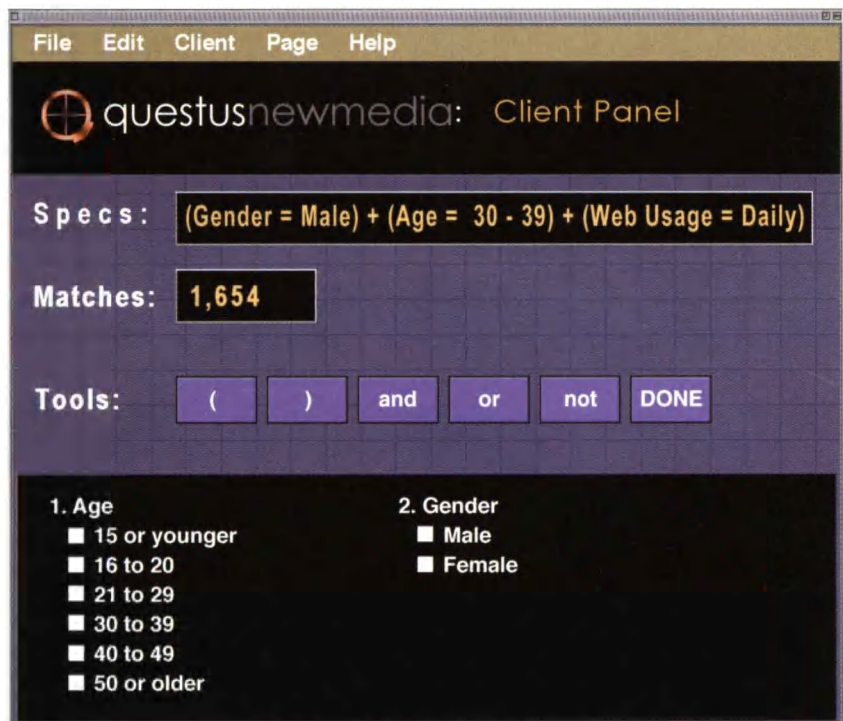
The survey, as with most on-line surveys, comprised 20 questions. Respondents were compensated for their participation with a chance to win a prize. Because the interviews were conducted on-line, it only took a few days to collect the data and download it into a statistical package for analysis. Virtually no time was lost in the development of the site because the entire research phase was completed so rapidly.

In this quantitative survey, as with most pre-launch surveys, we researched several issues related to site development, including:

- measuring likelihood of using the site and conducting a market sizing analysis;
- measuring the likelihood of purchasing specific products on the site;
- creating a demographic and psychographic profile of likely users;
- identifying which features and functionality are viewed as the most appealing;
- measuring preferences for names, logos, taglines and site interface designs.

### Overview of usability testing

Difficult navigation is the most common barrier to frequent usage of a site. If end users can't find what they are looking for, the appeal of content and products is irrelevant.



A proprietary panel helps Web sites get long-term feedback from site visitors.

Unfortunately, most sites are simply not sufficiently easy to use.

Usability tests are an ideal tool for helping make a site user-friendly. When developing the e-commerce site, as with most major sites, we conducted this phase of research in two stages. In each stage, 10 respondents participated in a one-hour interview.

In the first stage, respondents were shown a series of static screen shots and asked to provide feedback on the overall design and specific navigational elements. By using storyboards as stimulus, we generated extensive feedback into improving the designs before investing in any programming.

Preferences for visual themes, color schemes, iconography, terminology and content were all assessed before the programming team invested any time in developing the site's code.

The next stage of the research consisted of full usability tests conducted with respondents while they interacted with a fully functioning beta version of the site. The on-line shoppers worked with a Questus moderator as they explored the site and completed tasks. During the process, the moderator used a combination of passive observation and active probing to identify specific areas of the site's design and content needing improvement.

Using this two-staged usability testing process, the following objectives were accomplished:

- We measured users' ability to understand the site's overall design and the design of specific site features.
- We assessed ease of navigation and identified ways to make the site easier to navigate.
- We generated feedback into site terminology and iconography.

### Conducting ongoing site research

After a site is launched, it is critical to regularly obtain a detailed

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understanding of site visitors' usage and satisfaction, to ensure that the site is developed in a way that meets end-users' needs and produces long-term loyalty.

Measuring usage and satisfaction is accomplished by conducting quantitative surveys with site visitors. The quantitative surveys are periodically available on the site and respondents are typically enticed to participate in the survey by offering donations to charity and/or chances to win prizes. The surveys typically take respondents five to 10 minutes to complete and cover detailed issues related to virtually any aspect of the site's performance.

One of the powerful aspects of conducting surveys is that the information gathered can be used to create a panel of site users. For example, when the e-commerce site is completed, surveys will be available once each quarter on the site. When respondents participate in the surveys, all of their information will be downloaded into a proprietary panel. This panel will then become the backbone of a two-way communication system between the site and its end users. Whenever needed, panel members will be contacted to provide extremely rapid quantitative and qualitative input into the development of the site. This will be a particularly powerful tool given the rapid changes in the on-line marketplace, which make it imperative to quickly acquire accurate strategic input from site users.

Using periodic on-site surveys and ad hoc projects conducted with panel members, it is feasible to explore virtually any aspect of a site's performance. Some of the areas that will likely be explored on the new e-commerce site will include:

- measuring satisfaction with the site and identifying key drivers of satisfaction;
- understanding usage and perceptions of competitive sites;
- creating a segmentation of site users and understanding the needs and motivations of each segment;
- measuring perceptions of specific site elements, such as appearance,

speed, content and usability;

- assisting in the development of marketing concepts or off-line services;
- generating responses to new site features, tools and content.

### Powerful advantage

Integrating market research into the development of a Web site provides the site strategists and developers with a powerful competitive advantage. Web users are increasingly

sophisticated and demanding. More importantly, they are not loyal. By leveraging various market research techniques, site developers can assess end-users' demands and continually improve the site's ability to provide value and increase user loyalty. Given that millions of dollars are being made and lost on the Web every day, it is clear that the question is not "What sites should use market research?" The question is "What site can afford not to?" [4]



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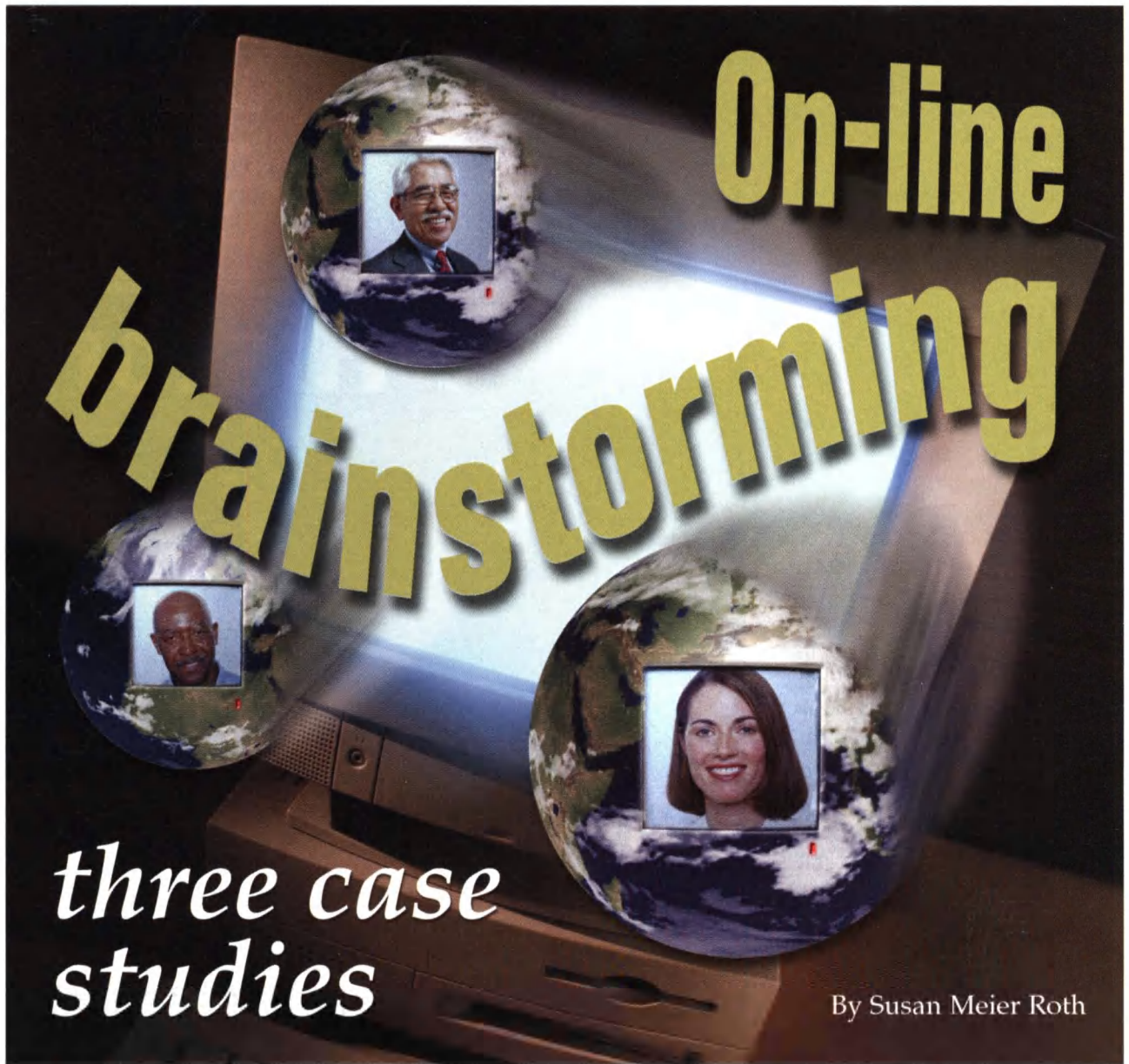


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*Editor's note: Susan Meier Roth is a product manager at Greenfield Online, Inc., a Westport, Conn., full-service marketing research firm. She can be reached at 888-291-9997 or at [sroth@greenfieldcentral.com](mailto:sroth@greenfieldcentral.com).*

**W**hat do a high-tech company, a gift shop that features items from the movie *Austin Powers: The Spy Who Shagged Me*, and a giant telecommunications company have in common? Like all successful companies in today's business world, they want to know what will

motivate consumers to buy their products and come back for more. And they want to get this information at a good price and quickly enough to show results in the next business quarter, if possible.

Whether your challenge is to improve marketing strategies for consumer goods, hard goods, financial services, telecommunications or high-tech products and services, the common message in this issue of *Quirk's* is that on-line marketing research will help you get closer to your consumers and stay ahead of the

competition.

Last year in this space we wholeheartedly endorsed on-line research and posited that it would revolutionize how consumer marketing research is conducted. Now, major corporations across the globe have embraced the Internet to conduct traditional quantitative studies and focus groups. In the last six months, we have seen acceptance levels by major corporations skyrocket. They now agree that Internet-based research methods can deliver accurate information needed to underpin solid marketing deci-



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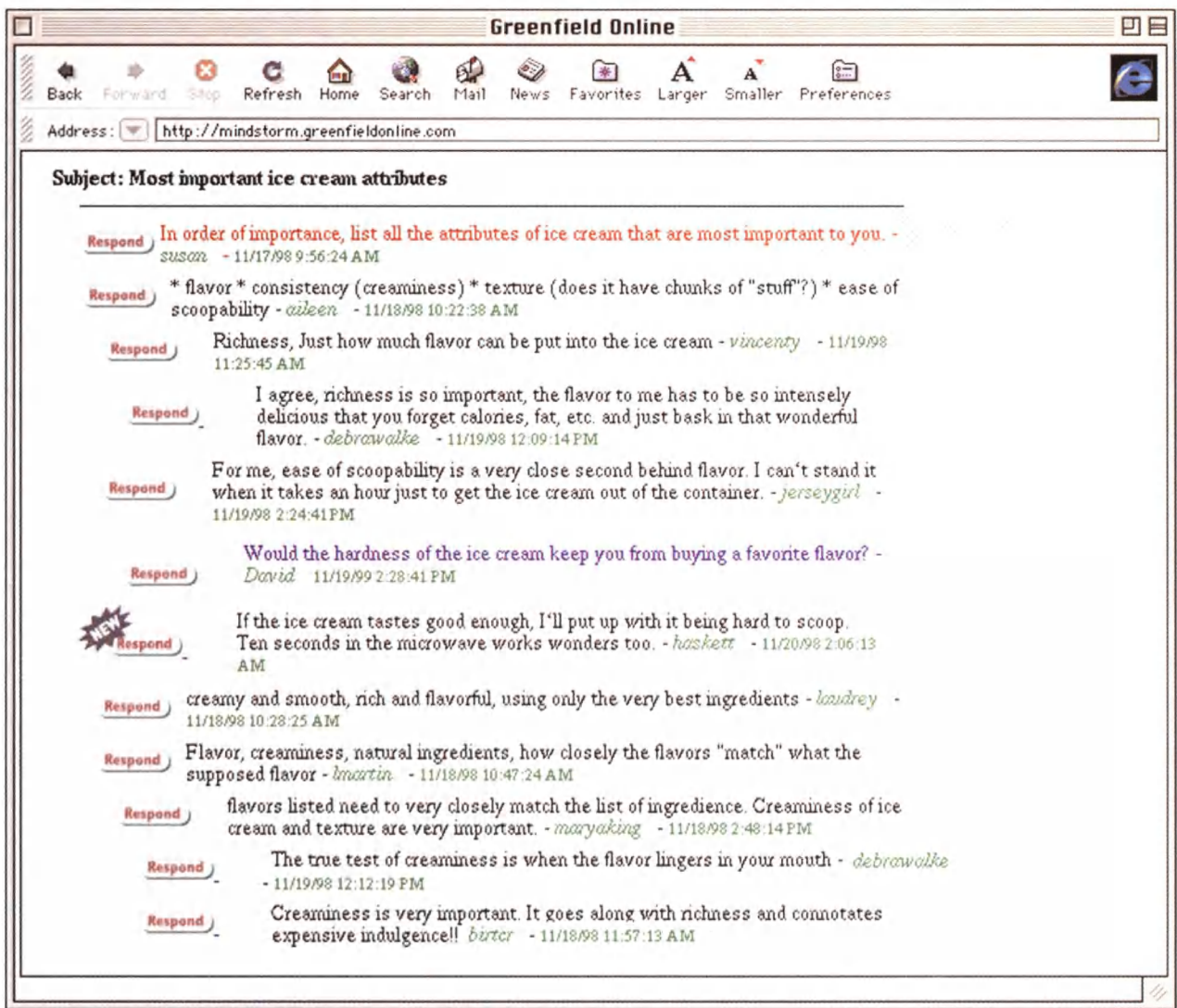
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An example of what a MindStorm session looks like on a PC screen.

sions. In fact, recently we have seen a trend toward "quasitative" solutions in which on-line surveying is combined with on-line focus groups to deliver hard and soft data as a package.

But when it comes to Internet tech-

nology, there is always something new to consider. A hot approach today is to let the Internet tie you directly to the consumers who can give you the answers you crave. Like pennies from heaven, let the ideas flow directly from users or potential

users directly into your corporate headquarters, R&D department, or advertising agency. Our firm calls this capability MindStorm™ — the Online Think Tank™.

We will discuss three examples of companies that successfully used

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MindStorm to solve a business problem — Spencer Gifts Online, a division of Universal Studios Online; Cross Pen Computing; and Media One — and also provide guidance about when to use on-line brainstorming vs. on-line focus groups.

#### How it works

With MindStorm, Greenfield Online assembles a group of on-line participants meeting the client's specifications. These participants are asked to log on to a special part of our Web site to view a series of questions that evolve over a period of days. MindStorm uses a threaded response procedure. This means that respondents can react to and build upon each other's ideas.

It is possible to insert graphics, and audio or video for feedback. Or the client can ask us to have respondents check out other Web sites — such as the client's competitors — and comment on what they like or dislike about the other company's products or services.

Sessions are monitored by facilitators experienced in leading interactive on-line sessions. Generally, the client also is able to monitor, direct and stimulate new questions and directions.

#### Brainstorming on-line vs. on-line focus groups

In choosing between on-line brainstorming and on-line focus groups, it's helpful to know the advantages of each and apply the one that best meets the objectives of your study.

An on-line focus group is a real-time interaction, which lasts about 90 minutes or so. Focus groups work to your advantage when you are looking for initial reactions to concepts, graphics, Web sites, etc. Respondents can be pretty succinct in on-line groups because of the nature of the methodology.

If you want in-depth responses and have a weighty agenda, on-line brainstorming may be a better option because you will be able to spend more time and cover more material.

The respondents are able to provide more information because they are logging in at their leisure and spending as much time as they want on each question.

#### Case study #1 — How Cross Pen Computing Group repositioned its new product, Cross Pad

The Cross Pen Computing Group and its New York advertising agency, Ellenson Group, wanted to improve

the customer appeal of a new product, CrossPad. A MindStorm session was conducted to supplement other off-line qualitative marketing research.

Launched last April, CrossPad is an electronic notepad that comes in two sizes, letter-size and 6x9 inches. A special digital pen transmits handwriting electronically to the pad, allowing the user to draw or take notes that can be instantly uploaded

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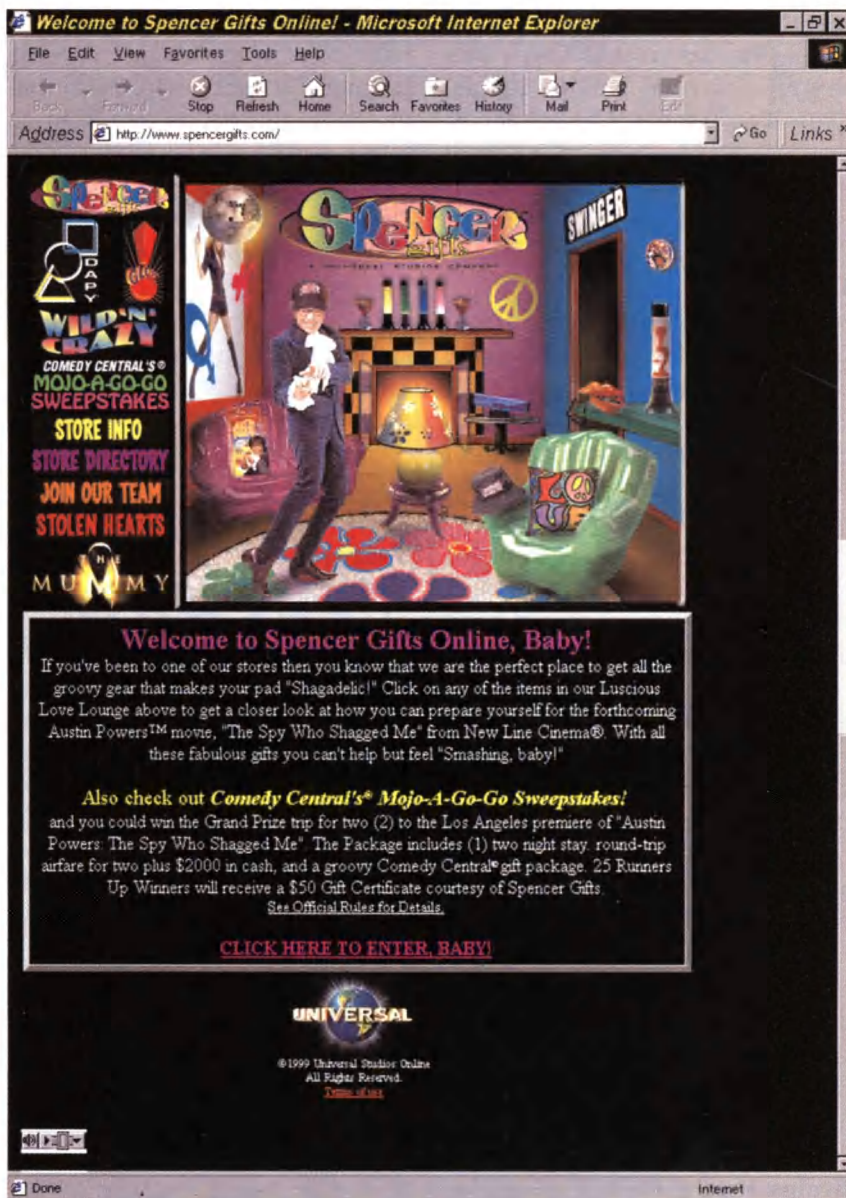
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A look at the home page of Spencer Gifts Online's *Austin Powers*-themed Web site.

into a personal computer.

The company and its agency wanted to get feedback about potential new product uses, target opportunities, and reactions to CrossPad's current advertising. Pricing also was an issue.

The company wanted input from some "creative consumers." We assembled an on-line group of 20 consumers who were known to be early adopters of high-tech products for the on-line dialog about CrossPad's features and benefits.

We arranged for digital copies of The Ellenson Group's CrossPad ad layouts to be placed into the password-protected MindStorm area of

our Web site. Erik Olson, a Greenfield Consulting Group moderator, guided the week-long on-line brainstorming session. The session elicited a wealth of product concept and benefit ideas. The key finding was that marketing messages should emphasize the product's usefulness to consumers who were active note-takers.

The original advertising campaign had targeted heavy computer users, using computer usage as the logical "door in" for any computer peripheral. The research, coupled with some additional on-line quantitative research and off-line qualitative research, helped evolve the CrossPad



target to "heavy note-takers," people who take a lot of notes and frequently refer back to them. This was critical learning, which proved very valuable in developing second-phase strategies.

"We were impressed by the fresh perspectives and out-of-the-box thinking from the 'creative consumers' and have incorporated some of this new thinking in our work," says Brian Mullins of the Cross Pen Computing Group.

### Case study #2 — How Media One Express launched the Music Zone Web site with consumer feedback

The company had a very tight budget and timeline to get this e-commerce site launched, yet it believed it was crucial to have customer feedback so the site would meet expectations and be successful right away.

Music lovers of the type Media One wanted were identified from the Greenfield Online research panel. The initial MindStorm session probed musical preferences, initial reactions to the Music Zone concept and feedback on some existing music-related Web sites. Later, the company re-recruited the same respondents and had them visit a beta version of the Music Zone site to get feedback.

This feedback, at a critical moment in development, proved invaluable to the final design. Media One was able to compare ideas based on respondent reactions to real Web sites linked into the discussion. The company felt participants were very open and articulate about issues critical to the future success of the site. Just a week prior to launch, the company was able to make adjustments to the site so that it truly met consumer needs and expectations.

### Case study #3 — How Spencer Gifts Online fine-tuned its Web site

Imagine you are trying to develop a Web site that will appeal to a very hip audience. You want not only

Generation X (mid-20s+) but also Generation Y (teens to early 20s). Spencer Gifts Online, a division of Universal Studios Online, created a Web site ([www.spencergifts.com](http://www.spencergifts.com)) that bills itself as "Your Shagadelic Online Shopping Source!" and features the character Austin Powers from the film *Austin Powers: The Spy Who Shagged Me*.

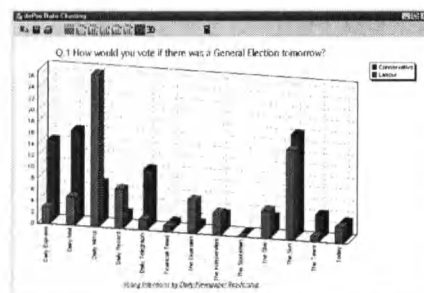
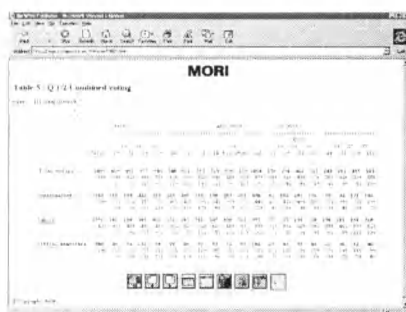
The company ran a double MindStorm session that lasted five

days; one session to assess what current customers thought of their approach and the gift items offered and one session to test the site with non-customers who had never visited before. Tracy Wain of Spencer Gifts told us that the transcripts delivered after the sessions were over were very helpful in positioning the site. Our response to the company's enthusiasm was, to quote Austin Powers, "Smashing, baby!"

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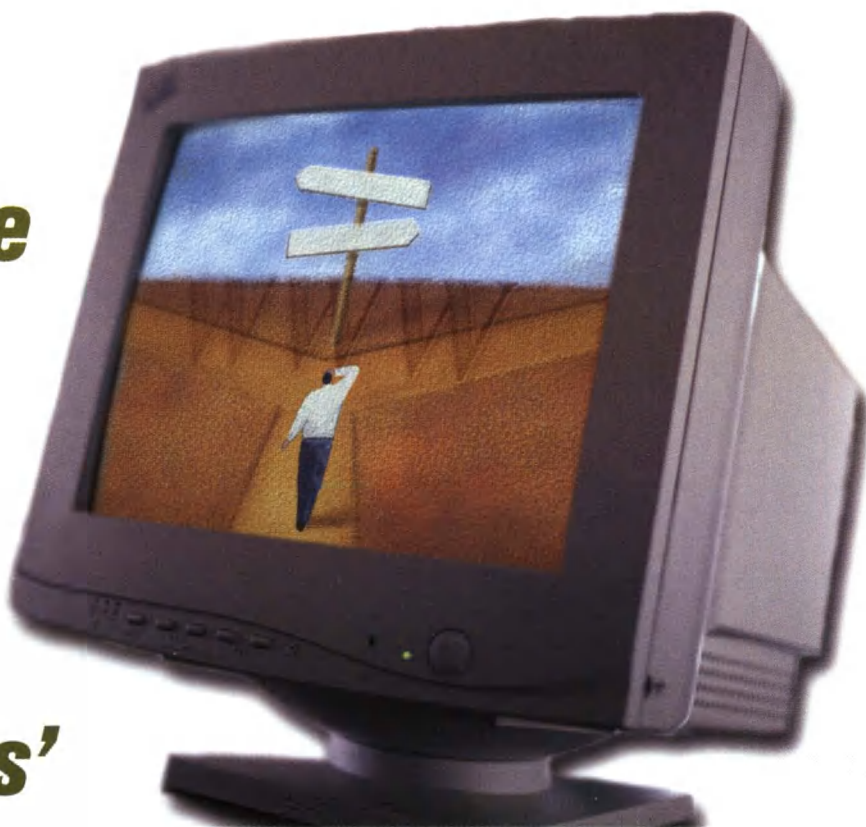
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# Feedback from on-line conjoint interviews satisfies respondents' intrinsic motivation



By Sam Kingsley

*Editor's note: Sam Kingsley is president of New York-based Kingsley Research, Inc. He can be reached at 212-719-1211 at sam@conjointonline.com.*

Some readers may be old enough to remember a time when consumers were flattered to be stopped in a shopping mall and asked their opinions or to be called on the phone. Completion rates of 60 percent or more were attainable. No more. Why not? Consider the following intrinsic motivations for participating in a survey:

- self-understanding — respondents can get feedback about themselves, individually and in how they stand compared to others;
- influence and control — respondents' views of the world are understood and their opinions valued;
- innovation — sometimes, respondents have a chance to learn about new

products or services being developed.

With few exceptions, current practice in market research doesn't meet these needs of respondents. One exception is well-designed customer satisfaction research, which can provide respondents a sense of influence and control and generate high levels of cooperation.

Another exception is on-line research, particularly conjoint, which provides an opportunity to meet respondents' intrinsic needs.

- In conjoint, respondents are asked to make thought-provoking trade-offs based on what they value. The answers are sometimes surprising to respondents, and the final results aren't always obvious.

- Because individual-level conjoint results can be revealing, there isn't a need to provide normative data, which may be difficult in some competitive situations.

- In Adaptive Conjoint Analysis,

respondents' answers are processed as they are given, so that individual-level results are automatically available at the end of the interview.

## Case study

The potential power of giving feedback to respondents can be seen in a recent application of conjoint to matching candidates with job openings. Futurestep, a subsidiary of Korn/Ferry International, is an on-line matching service that uses direct questions and adaptive conjoint to profile potential job candidates. Candidates, including those who may not be actively looking for career changes, register with Futurestep because of the personal information and feedback they receive.

Futurestep was the first company to use ConjointOnline, a Web adaptation of the DOS interviewing module of Sawtooth Software's Adaptive Conjoint Analysis (ACA).



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To recruit a base of candidates, Futurestep launched a nationwide radio and print advertising campaign. The *Wall Street Journal* is an important partner with Futurestep because of its recognition among potential candidates and clients. Within a month there were over 50,000 registrants. These individuals are generally mid-career managers and higher.

In addition to the conjoint data, Futurestep uses a battery of validated self-assessment instruments to better match personal preferences in decision-making and managerial styles. This data is matched with information provided by hiring managers and potential peers of the candidate who fill out a set of mirror instruments prior to the search.

Candidates come to Futurestep because they receive: complimentary career and market value feedback; guaranteed confidentiality of candidate's information; the credibility of Korn/Ferry International and the *Wall Street Journal*; and consideration for exclusive, non-advertised positions

from blue chip organizations as well as smaller, high-growth firms.

Some of the feedback from candidates illustrates their level of involvement with the process.

*"This whole process...provides an opportunity to establish a personal relationship in a high-tech world. The business world rarely sees technology as an enabler and technology rarely sees beyond its owns bits & bytes."*

*"Thank you! What a great way to get to know your business style. The more I know, the better I can communicate my needs in a job interview."*

*"The characteristics described above are the person I am. I did not believe the questions asked could reveal so much. This indeed is very interesting and exciting. Thank you."*

*"Absolutely amazing! You have drawn a very accurate picture of my personality, characteristics and personal goals."*

#### **Motivating to many**

Surveys that educate and inform respondents about themselves or their

world can be motivating to many people, as the comments above illustrate. Our firm's experience in on-line research with doctors shows that once respondents agree to participate, 85 percent are willing to complete short surveys with little notice. Many of the doctors comment about learning of developments in their field via the surveys.


Comments made by respondents indicate many are highly motivated to give honest, complete self-portraits — if only the questions and answer choices would let them! This is particularly true in conjoint, because the questions require some thoughtful reflection by respondents on what they really value. Respondents hold Web surveys to high standards — this is no place for sloppy thinking, inaccurate wording or erroneous analysis.

In ConjointOnline, respondents are given the opportunity to review their final profile, and to comment on whether it matches their self-perceptions. The addition of real-time checking for inconsistent responses (i.e., where a response might vary significantly from what was predicted) strengthens the bond between the respondent and the survey process.

Being able to start and complete a task at one time is a positive factor in motivation. From the respondent's perspective, the task isn't complete until the answers have been correctly registered and implications drawn.

#### **Cooperation improved**

To return to the original question, well-executed on-line research indicates that cooperation levels can be improved. In many surveys there is little indication that the research recognizes that true communication is a two-way street.

As long as our profession tries to pump more data out of people, those being pumped will increasingly view surveys as an economic transaction, for which they should be compensated. When there is true two-way communication, respondents' intrinsic needs are met. The implicit contract with survey respondents is reaffirmed, leading to a more satisfactory relationship for both researchers and respondents. 



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# Persuasive advertising drives toothbrush sales



By Michael J. Rabuck

*Editor's note: Michael J. Rabuck is senior vice president at rsc, The Quality Measurement Company, an Evansville, Ind., research firm. He can be reached at 812-425-4562.*

Fueled by strong television advertising and product innovation, sales for the toothbrush category have recently shown dramatic increases. Annual toothbrush sales topped three-quarters of a billion dollars in 1998, up 12 percent from the previous year and 23 percent versus 1996 (Exhibit 1).

In 1997 and 1998, the top five brands in this category enjoyed sales growth, with the strongest growth coming not from the largest brands but from the entries of the world's two largest television advertisers, Procter & Gamble and Unilever (Exhibit 2). During this time period, each of the top five brands

aired sales-effective ads, with the largest sales increases achieved by Mentadent and Crest, the two brands with the strongest ads.

## **Persuasive advertising drives category growth**

Our firm, rsc, tracks the toothbrush category through its CATS (Comprehensive Advertising Tracking Service) system. This syndicated service provides ARS Persuasion scores (a proven indicator of sales effectiveness — see sidebar for more information) for commercials that air in a given category. In 1997 and 1998, CATS data revealed that the toothbrush category had the benefit of strong advertising, which previous studies have shown to affect not only the advertised brand's growth but the category as a whole (Ashley, 1998; Mondello, 1996). In her 1998 *Journal of Advertising Research*

article, Ashley related the conclusions from an rsc study which used CATS data from four categories (dentifrice, margarine, glass cleaner, and spaghetti sauce) to examine the effect of persuasive advertising on category growth:

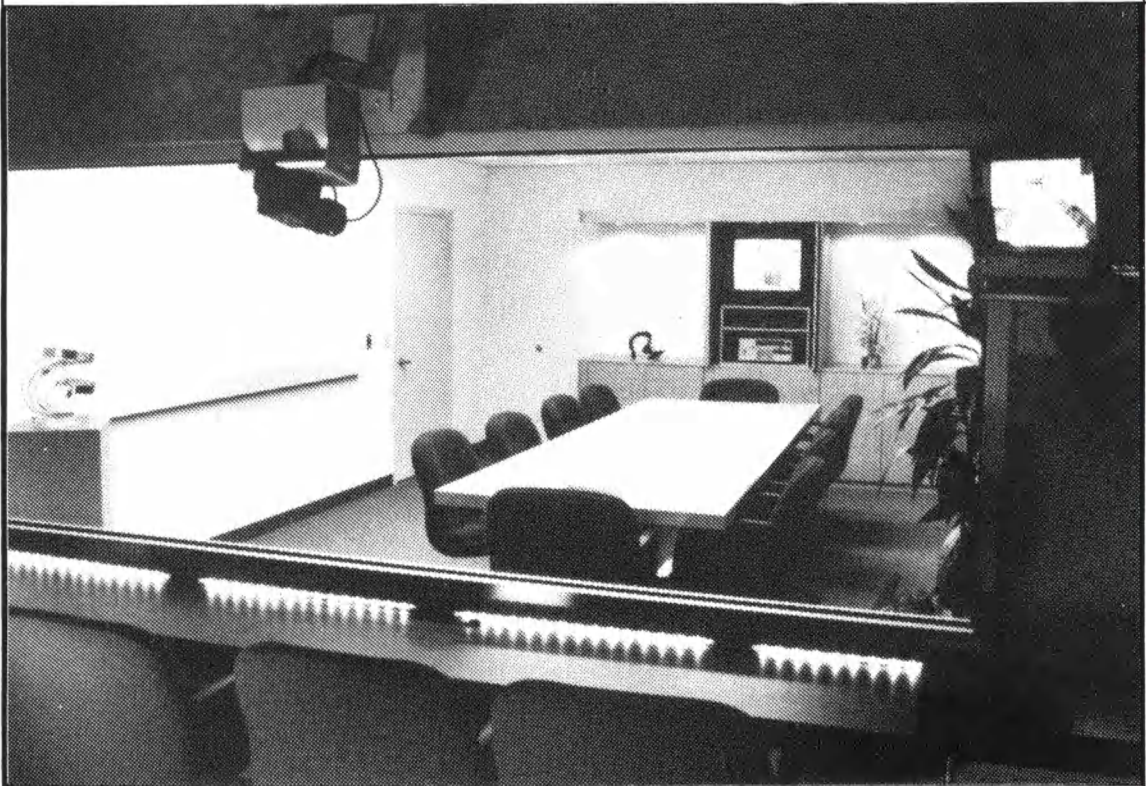
*Although an individual brand's advertising generally has the purpose of increasing the advertised brand's sales (and share), the aggregate effect of persuasive advertising in a category is an increase in total category volume (the more sales effective the advertising, the greater the increase).*

Likewise, Mondello (1996) noted the positive effect of persuasive Celestial Seasonings advertising on that category:

*Our advertising didn't just steal share from competitors; it grew the herbal tea category. While tonnage for most other hot beverages was declin-*



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ing during this time period, herbal teas sales were up, with increases as high as 12 percent in one of the spot television markets.

### Persuasive advertising drives brand sales

As shown in Exhibit 2, a review of CATS data revealed that advertising was driving Mentadent and Crest's remarkable sales growth in 1997 and 1998. This finding is consistent with the results of rsc's 1998 Global Validity

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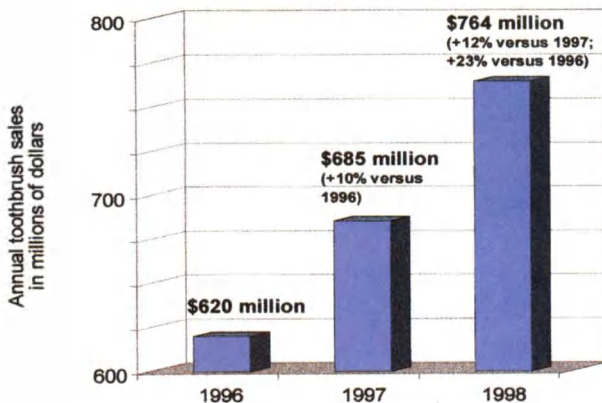
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Exhibit 1

### Toothbrush Category Enjoying Rapid Growth



Source: A.C. Nielsen SCANTRACK®.

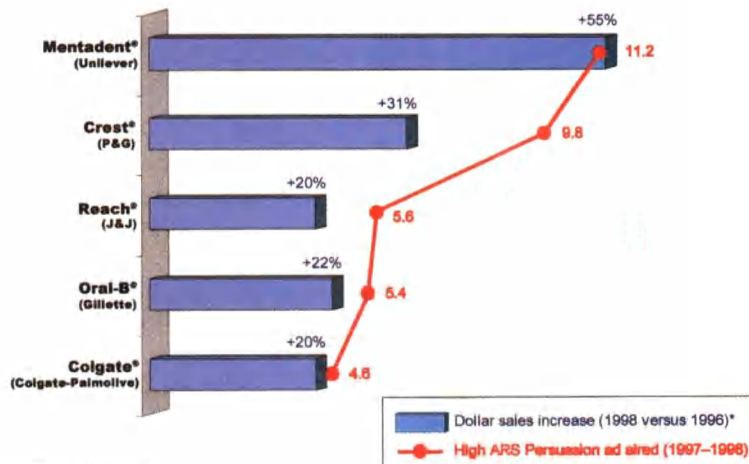
Study of 155 ARS Persuasion to in-market cases, which suggest that the higher an ad's ARS Persuasion score, the higher the sales increase expected (Exhibit 3). Recently these findings were described in *The Advertiser* (Shirley, 1999):

dent of maintaining or growing the brand, ads scoring +4 and above will be aired.

Given this empirical knowledge about how advertising effectiveness relates to sales and share growth, the following sections will review the

Exhibit 2

### Growth of Top Five Toothbrush Brands and ARS Persuasion Levels of Advertising Aired (1997 and 1998)



\* Source: A.C. Nielsen SCANTRACK®.

While this method has been rigorously managed and validated in over 2,000 cases, the most recent study shows the metric's predictive and straightforward nature:

- Ads scoring +7 and above have a 97 percent likelihood of moving the business ahead at least a half share point.
- Ads scoring under +2 will probably not (82 percent odds) even maintain the brand's market position.
- If you want to be 80 percent confi-

Mentadent and Crest commercials to gain some insight about what might have made them so successful at building brand preference, sales, and market share.

#### Mentadent ProCare Toothbrush

According to Mentadent's Web site, "Nearly a quarter (22 percent) of dentists believe that their patients brush their teeth and gums too hard." Based on this premise, Unilever is marketing



**Exhibit 3**

**ARS Persuasion Scores to Market Results**

Simple, Straightforward, Empowering

ARS Persuasion level	Positive share-point difference* of at least:			
	0.0+	0.5+	1.0+	2.0+
12.0+	100%	100%	92%	80%
7.0-11.9	100	97	69	43
4.0-6.9	80	55	43	20
2.0-3.9	60	26	11	0
< 2.0	18	9	0	0

84 brands  
155 cases  
6 countries

\* Period after onset of advertising, versus period before advertising.  
Source: Blair and Rabuck (1998)

its \$3.00 Mentadent ProCare toothbrush as the one that will help consumers be more gentle when they brush.

Ammirati Puris Lintas used this "gentle on teeth and gums" selling proposition to produce the highest-scoring toothbrush ad over the two-year period. "Miles Rubin's Dad's a

Dentist :30," which began airing in August 1998, achieved an ARS Persuasion score of +11.2 (at the 92nd percentile of all ads tested by rsc).

The commercial, a testimonial by Miles Rubin, uses a problem/solution format to spotlight Mentadent ProCare toothbrush's brand-differentiating features: "a fully flexible handle" and

"special bristles (that) clean teeth and massage gums." The tagline urges viewers to "Brush smarter. Not harder."

While much of the ad's strength is probably due to a strong selling proposition, its success may also come in part from its strong diagnostic profile (Exhibit 4). The commercial includes 10 of the 17 known strategic and executional elements (or rsc Validated drivers [see sidebar for rsc Validated drivers methodology]) which have been quantitatively demonstrated to relate to sales-effective advertising. The most important of these is Mentadent's brand-differentiated key message, followed by its strong brand name which is both double-branded and reinforces the brush's unique benefits. The inclusion of three positive executional elements points to the commercial's strong product focus: the product is on screen for more than a third of the commercial, and the ad both demonstrates the use of the product and gives information on the results of that use. Finally, the execution avoided four of the five negative factors that tend to

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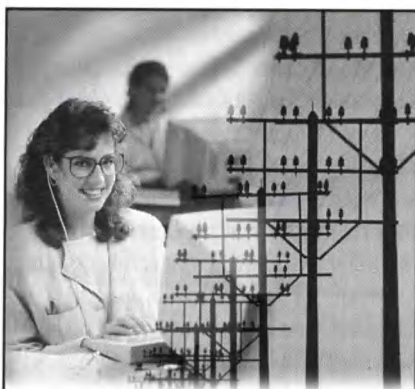
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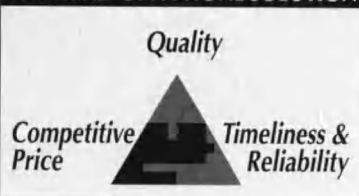


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### Exhibit 4

#### A Comparison of rsc Validated<sup>®</sup> Drivers for Top Three Toothbrush Ads

	Percent of ads with superior <sup>1</sup> ARS Persuasion results		Mentadent ProCare	Crest Extender	Oral-B CrossAction
	When element is present	When element is absent			
<b>Strategic elements:</b>					
Brand-differentiating key message	30	16	✓	✓	✓
New product/new feature information	33	14		✓	✓
Product convenience information	31	22			
Competitive comparison	26	22			✓
Superiority claim	25	22			✓
Brand name reinforces benefit	31	18	✓	✓	
Product is double-branded	34	21	✓		✓
<b>Positive executional elements:</b>					
Time actual product is on screen <sup>4</sup>	30	18	✓	✓	✓
Demonstration of product in use	27	16	✓	✓	✓
Information on results of using	24	17	✓	✓	✓
Setting directly related to use	26	21		✓	
Product benefits main message	23	22		✓	✓
<b>Negative executional elements (the absence of a negative element is noted by an "X")</b>					
Slice-of-life format	14	24	X	X	X
Male main character(s) <sup>2</sup>	18	24		X	X
Number of on-screen characters (4+)	20	25	X		X
Number of vignettes (2+)	19	23	X	X	X
Background cast	22	25	X		X

<sup>1</sup> Superiority is judged as a significant difference at the 90 percent confidence level relative to the Fair Share<sup>®</sup> degree-of-difficulty benchmark.  
<sup>2</sup> The 23 percent threshold was empirically determined to be the Related Recall level which yielded the best discrimination of superior and inferior ARS Persuasion outcomes.  
<sup>3</sup> The key message is the sales point that is repeated most often or emphasized most strongly in the execution. The 16 percent threshold was empirically determined to be the playback level which yielded the best discrimination of superior and inferior ARS Persuasion outcomes.  
<sup>4</sup> Product is on screen for more than one-third of the commercial.  
<sup>5</sup> May only be applicable in categories for which women purchase more frequently than men.  
 Source: rsc. Summary of rsc Validated Drivers for the ARS Persuasion Measure. Evansville, IN: rsc, 1997.

detract from a commercial's message.

### Crest Extender

Leo Burnett used a very different approach in Procter and Gamble's humorous introductory ad for the Crest Extender toothbrush. The commercial features a family that uses dental floss for tying fishing lures, hanging model airplanes, stringing beads — everything except flossing their teeth. It highlights the toothbrushes "gentle extender fibers to help clean deep between teeth" and closes with the tagline "The new Crest Extender fits between to get teeth clean."

The commercial scored +9.8 (at the 88th percentile of ARS Persuasion scores) and began airing in June of 1998. Like the Mentadent ad, "Need to Floss :30" has a strong diagnostic profile, with 11 of the 17 rsc Validated drivers including a brand-differentiating message and a brand name which rein-

forces Extender's benefits (Exhibit 4). The ad's executional content is also very strong; it used all five positive elements and avoided three of the negative elements, indicating a very strong product focus with some distraction due to the ad's four-person cast.

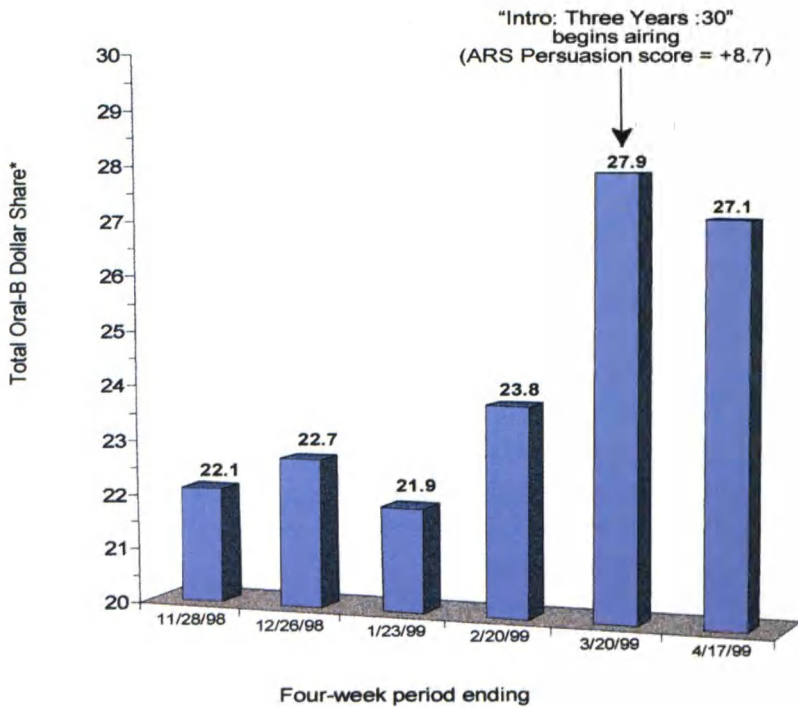
### Oral-B CrossAction off to a strong start in early 1999

1998 was a blockbuster year for the toothbrush category, but 1999 is also off to a very strong start. Category leader Gillette scored early with their new \$5 Oral-B CrossAction, the most expensive mass-marketed toothbrush in history.

The CrossAction introductory ad "Intro: Three Years" achieved an ARS Persuasion score of 8.7, the strongest toothbrush ad aired in early 1999. Lowe & Partners/SMS was behind this product-as-hero introductory spot for the



**Oral-B Share Jumps With Airing of Persuasive Introductory Ad for CrossAction Toothbrush**



\* Source: A.C. Nielsen SCANTRACK®.

“revolutionary” new Oral-B product. The ad focuses on CrossAction’s “unique crisscross bristles (which) penetrate to lift out and sweep away more plaque than any other brush.” Like the Mentadent and Crest commercials, this very product-focused ad has a strong diagnostic profile, with 14 of the 17 rsc Validated Drivers (Exhibit 4). The commercial used five of the seven strategic elements related to strong ARS Persuasion scores: brand differentiation, new-product information, a competitive comparison, a superiority claim, and a double-branded product name. It also used four of the five positive executional elements and avoided all five negatively-related elements.

With this introductory advertising extolling CrossAction’s strongly differentiated feature and superior benefits, Oral-B market share jumped to a 3+ year high of 27.9 percent as the ad began airing in late February 1999 (Exhibit 5).

**Looking to 1999 and beyond**

According to an October 1998 arti-

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# Measurement methodology


**ARS Persuasion metric:** The ARS Persuasion measure is based on a pre-post shift in brand choice obtained in a secure, off-air, simulated-purchase environment. It is calculated by subtracting the percent of respondents choosing the advertised product over competition before exposure to the television material from the percent choosing the advertised product after exposure — the net effect of retention and attraction as a result of the advertising stimulus. In the U.S., the ARS Persuasion sample consists of 800–1,000 respondents (aged 16+) randomly recruited by mail from eight geographically-dispersed markets.

**The quality of rsc's ARS Persuasion measurement** is continuously monitored through our ongoing Measurement Hygiene programs: about 2,500 test-retests have been conducted to manage and improve the metric's reliability and precision over time, and about 2,000 tests have been compared to market performance for validating and calibrating.

**Rsc Validated drivers:** The rsc Validated drivers are made up of seven strategic elements and 10 executional content elements which are related to superior ARS Persuasion results (a list of these elements is shown in Exhibit 4). The rsc Validated drivers are identified using a database of over 14,000 ARS tests and 5,000 recent tests conducted on more than 1,300 brands in over 150 product categories. Each commercial is coded according to 35 strategic and 122 executional content dimensions. Each of the dimensions is then examined across all current ads to determine whether it is associated with higher or lower ARS Persuasion scores.

cle in *The Boston Globe*, Oral-B President A. Bruce Cleverly expects that oral care may be a \$2 billion dollar business for Gillette by the year 2000. Following Oral-B's success at

"trading customers up," Unilever and Colgate Palmolive are introducing their own premium brushes into this fast-growing category. Unilever is unveiling its \$3.50 Mentadent

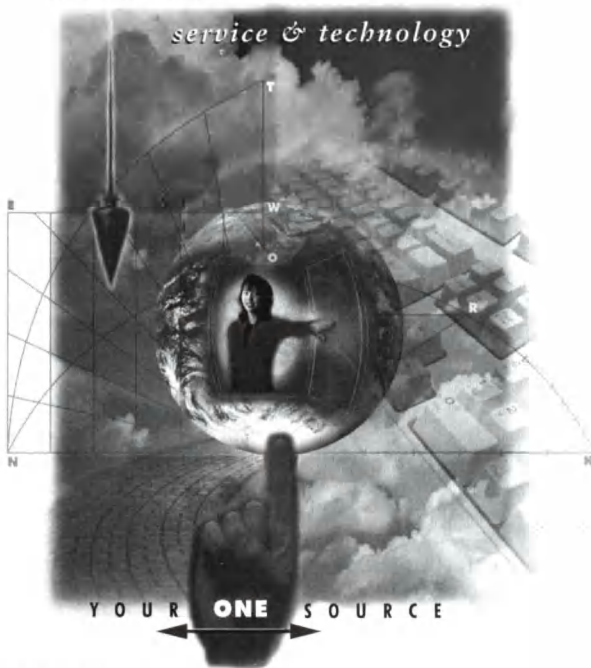
Surround with a \$15 million dollar media budget, and Colgate-Palmolive is planning a \$10 million summer launch of the Navigator (priced at \$3.29). Dynamic product innovation and abundance of persuasive advertising promise to keep this category growing into the new millennium. rsc will continue to track this and other categories to determine advertising's impact on brand preference and market share as well as category sales. 

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## Survey Monitor

continued from p. 6

more interesting events of the century, men are at least three times as likely as women (7 percent vs. 2 percent) to select a technology event as the most interesting of the period.

Henry Ford's introduction of the Model-T rises to the top as the most interesting event of the first decade for 31 percent of men and only 18 percent of women. Similarly, 25 percent of men believe the first coast-to-coast phone call is the most interesting event of the second decade, as opposed to 19 percent of women.

Women are five times as likely as men (10 percent vs. 2 percent) to feel that the most interesting event of the entire 20th century was an event related to women's rights or the changing role of women. By a margin of nearly two to one, 51 percent of women (vs. 27 percent of men) feel the most interesting event of the 1920's was women beginning to vote in national elections.

Half a century later, in the 1970's, 51 percent of women again say the most compelling event of the decade is the women's movement for equal pay and job opportunity (vs. 33 percent of men). In their choice for the No. 1 event of the 20th century, women are more inclined than men (17 percent vs. 11 percent) to cite AIDS or the advent of antibiotics.

When it comes to crises and disasters, women are much more likely than men (48 percent vs. 31 percent) to recognize the Oklahoma City bombing of the 1990's as the most compelling event of the decade. JFK's assassination drew much more attention from women than men (36 percent vs. 25 percent), in the 1960's, when men are more concerned with the Vietnam War (34 percent vs. 27 percent of women).

Nearly equal numbers of men and women believe that the most interesting events of the first decade (25 percent of men and 29 percent of women), the 1950's (50 percent and 54 percent) and the 1960's (26 per-

cent and 28 percent) are the periods' civil rights movements. The struggles for social equality are also envisioned by virtually identical numbers of men (17 percent) and women (16 percent) as the most interesting events of the entire 20th century.

## Make mine a microbrew

According to a recent Maritz AmeriPoll from St. Louis, Mo.-based Maritz Marketing Research, 51 percent of all Americans have had at least one serving of beer in the past month. Of those who drink alcohol, 84 percent have hoisted at least one mug of suds during the past month. The survey of 996 American adults over the age of 21 also finds that the average number of servings of beer consumed monthly (among those who drink beer) is 18.7. Men who drink beer drink twice as much as women, averaging 22.8 servings monthly, compared to 11.3 for

women. The highest average number of beers consumed monthly, 23.3, is found among the youngest drinkers age 21-24, while the lowest average, 12.5, is among seniors age 65 and older.

Sixty-three percent of beer drinkers say they have drunk at least one regular beer in the past month; numbers are slightly higher for men (67 percent) than women (56 percent). Light beer has an edge among female beer drinkers, 53 percent of whom have had at least one in the past month, compared to 46 percent of men. Just 4 percent of beer drinkers have consumed a non-alcoholic beer in the same time period. A majority of that beer, 63 percent, is drunk at home, with the rest consumed at bars, restaurants, and other establishments.

Younger groups tend to do more of their beer drinking socially, away from home, with 21-34-year-olds consuming approximately 52 percent of their monthly beer intake in bars



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and restaurants. Older age groups (age 35-54), on the other hand, go out for about 37 percent of their beers. Over half (58 percent) of American beer drinkers say their household beer consumption has stayed about the same compared to last year, while 11 percent say it has increased, and 31 percent say it has decreased. More women say their beer intake has increased — though only slightly (13 percent compared to 10 percent of men).

Maritz AmeriPoll asked several questions regarding advertising and purchasing habits. Just over half (54 percent) of all respondents say they can recall seeing or hearing television, radio, print, or billboard beer advertising during the past month. Men tend to have greater recall of beer ads than women (59 percent vs. 49 percent). Recall was highest at 60 percent among younger people, age 21-34. Most respondents who drink or buy beer (88 percent) say they are not likely to purchase a particular brand of beer based on advertisements they have seen. About 9 percent say they are somewhat likely, and just 2 percent say they are very likely. In-store displays do not seem to be effective either, as 83 percent say these displays are not like-

ly to sway their choice of beer purchases.

Price appears to be a bit more motivating. While 60 percent of beer drinkers/buyers say that discounts, sales, or price promotions are not likely to affect their choice of beer, 40 percent say that price is somewhat or very likely to affect their decision. Men are more swayed by price than women (18 percent of men say price is very likely to affect their choice, compared to 13 percent of women), as are younger buyers age 21-24 (20 percent say price is very likely to affect their choice of beer).

Nearly 70 percent of those who drink and/or buy beer say they generally base their choice of beer on brand, not price. Men tend to be more brand conscious than women (73 percent vs. 67 percent). Brand preference over price also tends to increase with income.

When it comes to beer, men are much more willing than women to try new things: 22 percent of men who drink beer say they are very likely to try a new brand, compared to just 9 percent of women. Overall, about half (51 percent) of beer drinkers say they're not likely, 32 percent say they're somewhat likely,

and 16 percent say they are very likely. Adventurousness also decreases with age, with 21 percent of drinkers age 21-34 very likely to try a new beer brand, compared to just 8 percent of those age 55 and older. Respondents with lower incomes are also more cautious with their beer money, and tend to be less willing to try new brands than respondents with higher incomes. A few survey respondents (just 8 percent) have tried brewing their own beer, most of them men.

Of those who have a favorite brand of beer, the following are the rankings of their choices:

- #1 Budweiser Brand . . . . . 27 percent
- #2 Miller Brand . . . . . 17 percent
- #3 Coors Brand . . . . . 11 percent
- #4 Michelob Brand . . . . . 9 percent
- #5 Busch Brand . . . . . 4 percent
- Corona Brand . . . . . 4 percent
- #6 Heineken Brand . . . . . 3 percent
- #7 Molson Brand . . . . . 2 percent
- Samuel Adams Brand . . . . . 2 percent

For more information call 800-446-1690 or visit the AmeriPoll Web site at [www.maritz.com/apoll/](http://www.maritz.com/apoll/).

## A look at air travel patterns among Hispanics

Two Hispanics in five (40 percent) traveled by air during the last 12 months, according to Hispanic Express, a product of Taylor Nelson Sofres Intersearch, a survey firm headquartered in suburban Philadelphia. Past-year airline travel was highest among bilingual Hispanics (47 percent) and lowest among Spanish-dominant Hispanics (36 percent).

Two-thirds of Hispanic airline passengers took two or fewer trips by air. Slightly more than half of these trips were to U.S. cities and 45 percent of the travelers had Latin American destinations. Spanish-language usage appeared to be strongly related to a Hispanic traveler's destination. Spanish-dominant

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Hispanics most often flew to Latin America. Most bilingual and English-dominant Hispanics visited U.S. cities. Almost three-fourths of all Hispanic travelers' (71 percent) air travel was for personal reasons. Business-only trips accounted for 16 percent of all trips, while 13 percent of all trips were for both business and personal reasons.

Among Hispanics, American Airlines is the best-known airline by far. Three-fourths of the sample (76 percent) are aware of the carrier on an unaided basis. Continental is a distant second (39 percent), followed by Delta (32 percent), Southwest (31 percent) and United (21 percent). Hispanics usage of airlines during the past year replicates the findings for awareness. More than one-third of Hispanics (37 percent) have flown American Airlines during the past year, while only 17 percent flew Southwest Airlines and 16 percent flew Continental. Delta (9 percent) and Aero Mexico (8 percent) follow.

While American's strong presence in the Hispanic market is consistent by language usage, Southwest Airlines, Delta and TWA are much stronger among English-dominant Hispanics. Continental's presence among each "language" group varies only somewhat. Airline usage follows the same general tendency.

Hispanic airline travel is highest with New York and Miami Hispanics, two markets with Caribbean populations. Past year air travel is lower in the three cities with large Mexican populations — Los Angeles, San Antonio and Houston.

New Yorkers and Miamians more often traveled to Latin American destinations. Almost three New York Hispanics in five (58 percent) and 55 percent of Miami Hispanics flew to Latin American cities during the past year. In contrast, less than one San Antonio Hispanic in five (18 percent) flew to Latin America during the past 12 months. Mexico's proximity to San Antonio's overwhelmingly Mexican-American population may explain this finding.

The carriers' presence in the five markets reflects the regional nature of the airline competition. The carriers are strongest in the markets they either serve directly or have hubs, and weakest in markets in which they have few flights. For example, three-fourths of San Antonio Hispanics (77 percent) and two-fifths of Houston Hispanics (41 percent) are aware of Southwest Airlines — a Texas-based carrier. In contrast, only 9 percent of Miamians and 1 percent of New Yorkers mention Southwest — markets the airline does not serve.

The other airlines' regional strengths among Hispanics are as follows: American — Miami (93 percent), New York (89 percent) and San Antonio (86 percent); Continental — Houston (78 percent); Delta — San Antonio (47 percent); TWA — New York (4 percent); Aero Mexico and Mexicana — Los Angeles. United awareness varied little across the five markets exam-

ined. It was slightly stronger in Los Angeles and Miami. (Chicago, United's headquarters, was not included in this wave of Hispanic Express.)

Advertising, particularly Spanish-language advertising, appears to drive awareness and usage in this category. Two-fifths of Hispanics (42 percent) recall advertising for American Airlines. In contrast only 11 percent recall Southwest Airlines ads and 10 percent recall Continental Airlines ads. Approximately half Spanish-dominant and bilingual Hispanics recall American Airlines ads, while only approximately one-fourth of English-dominant Hispanics recall American ads. This suggests that the carrier's Hispanic advertising campaign has made a strong impact. In contrast, only 2 percent of Spanish-dominant Hispanics recall Southwest Airlines advertisements, while 25 percent of English-dominant Hispanics recall Southwest Airlines ads.



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Each month Hispanic Express covers New York, Miami, Los Angeles and San Antonio, and includes one bonus market per month. Each sample contains an equal number of male and female respondents. For more information call Daniel Bloom at 215-442-9601.

## Greeting cards serving as gift substitute

Half of all adult Americans purchased greeting cards in the past year, while cards are more accepted as a substitute for a gift, a new market research report shows.

The greeting card and stationery market reached \$12.1 billion in retail sales in 1998, according to the report, *The Greeting Card and Stationery Report: The Market, The Industry, The Trends*, published by Unity Marketing. Greeting cards alone, which account for over 60 percent of the total category sales, rose 3 percent over 1997 levels to reach \$7.5 billion in sales.

"Greeting cards and stationery are one of the most important consumer categories within the overall giftware industry," says Pam Danziger, president of Unity Marketing. "Half of the adult consumers surveyed in our

national research purchased a greeting card in the past year from either a specialty retailer, a mass merchant or by mail order. The research also shows that more consumers are using a greeting card as a substitute or replacement for a gift."

The prime market for greeting cards and other stationery products is an individual between 25 and 44 years of age, living in a multiple-person household. Women purchase cards only slightly more frequently than men. The typical greeting card consumer purchases 12 individual cards per year and two boxed sets of cards. While the growth prospects for the greeting card and stationery market continue to be positive, Unity's research reveals shifts in consumer attitudes that can represent significant changes to the market's growth prospects in the future.

The research uncovered four different types of greeting card consumers based upon differences in purchase motivations and buying behavior. The largest consumer segment, accounting for about one-third of greeting card consumers, is called a Downtrender. These individuals are buying fewer greeting cards today than they did in the past. They tend to be older and are more likely to be

retired. The Sentimentalists, just under 30 percent of the market, represent the avid greeting card consumer, who purchases 15 cards per year and tends to shop for cards once a month or more frequently. The Practicals, 21 percent of card consumers, purchase about the same number of cards per year as the Sentimentalists, but are more likely to buy boxed sets of cards. The Practicals also consider a greeting card an acceptable substitute for a gift. The Technologist, about 17 percent of the market, is an emerging segment in the greeting card market. These computer-savvy greeting card consumers view e-mail as a substitute for a traditional card. This segment is more likely to be male, single, and between the ages of 25-to-34.

"The Technologist is the prime target market for greeting card publishers exploring the Internet as a distribution channel," says Danziger. "For continued growth, greeting card marketers must continue to meet the needs of the Sentimentalists and Practical consumer segments, while striving to capture the declining interest of Downtrenders and providing e-commerce-based solutions for the Technologists."

In response to shifts in consumer trends, greeting card publishers are offering a wide range of new alternatives to consumers. "New subjects such as cards to and from the household pet, cards showcasing favorite licensed characters from cartoons and movies, as well as the popularity of ethnically-oriented cards are all contributing to the rise in sales of greeting cards," says Danziger. "Publishers are also presenting cards designed to be more relevant to the social trends impacting the family and the workplace, such as cards for children of divorce, step-parent cards and working mother and parent-traveling cards."

For more information call Pam Danziger at 717-336-1600 or visit the company's Web site at [www.unitymarketingonline.com](http://www.unitymarketingonline.com).



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## Product & Service Update

continued from p. 10

petitors, such as Amway, entering a traditional utility game (an example of the long talked about "external threat").

The Natural Gas Deregulation Study is phase one of a two-phase project. The second phase, scheduled for fall 1999, will quantitatively survey both residential and commercial natural gas customers' switching characteristics, perceived performance and satisfaction ratings of the gas marketers and Atlanta Gas Light. Phase two will also identify interest in new services/products from gas marketers (bundling), and perception of deregulation as a whole. For more information call Nikki Eriksson at 770-455-6994 or visit the company's Web site at [www.EnergyMarketSolutions.com](http://www.EnergyMarketSolutions.com).

## Data management service for research firms

DSC Services, a Westlake Village, Calif., data management outsource company, has introduced its Eclipse Info-Direct Process and Reporting Service, which allows research firms to take on excess work flow, quickly turn around rush jobs, and process reports that are too large to generate internally. The service is backed by the firm's Info-Direct System, which accepts multiple data formats and processes millions of records at a time. DSC customizes each report with charts and data tables. For more information call Paula Miller at 805-495-5128.

## Search engine accesses hidden Web sites

Linthicum, Md.-based powerize.com has relaunched its Web site ([www.powerize.com](http://www.powerize.com)) and introduced two Internet applications: a free business intelligence and research center, and a helper application for the major Web portals, including Yahoo!, Excite, Lycos, MSN, Netcenter, Go Network, Altavista, HotBot, Snap.com, and AOL.com.

Powerize.com is an aggregation of business content, featuring more than 32 million articles, profiles, reports, analyses, and other documents from more than 8,000 sources worldwide and including information about more than 11 million public and privately-held companies in the U.S. and abroad. Free extensive summaries are available for all documents, which are organized in 20 industry segments.

Powerize.com also provides access to scores of "hidden" Web sites which the major Web search portals can't access. These database-driven sites can't be indexed by the "spiders" the portals use to catalog the Web, but they can be searched in real-time by powerize.com's proprietary PowerLink technology. Among the hidden Web sites that are searchable through powerize.com are the U.S. Patent and Trademark Office database, the U.S. Securities & Exchange Commission's EDGAR database, and industry-specific sites such as Apparel.Net, Hospitality.Net, the Insurance News Network, and

Manufacturing Marketplace.

To complement the free powerize.com site, powerize.com has also released version 1.0 of Powerize, a freely-downloadable software program that is a helper application for the Web's major search portals. The Powerize software powerizes the major search portals to find the business and investment information people need. With Powerize, users can simultaneously search powerize.com and their favorite search portal, and receive results from both in separate browser windows. The free software is available for immediate download at [www.powerize.com](http://www.powerize.com). For more information contact Cheri Pender at 703-438-3500 ext. 8117 or at [cpender@powerize.com](mailto:cpender@powerize.com).

## New QDA software from Tragon

The new Windows-based Interactive QDA software from Redwood City, Calif.-based Tragon Corp. features a menu-driven point and click format

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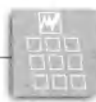


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## Windows-based CBC from Sawtooth Software

Sawtooth Software, Sequim, Wash., has released Choice-Based Conjoint (CBC) version 2 for

Windows. All aspects of questionnaire development and analysis are managed through the intuitive, point-and-click interface. Graphics and multimedia elements can be included in the conjoint interview. Capacity has been expanded to accommodate 10 attributes with up to 15 levels each. In addition to the logit module included in the base CBC system, data can be analyzed using CBC's advanced analysis modules: Latent Class and CBC/HB for hierarchical Bayes estimation. A demo version of the software is available from Sawtooth Software by calling 360-681-2300.

Hierarchical Bayes software for estimating part worths from choice data called CBC/HB is now also available from Sawtooth Software. Users do not need to own Sawtooth Software's CBC System for Choice-Based Conjoint to use this tool. The CBC/HB Module reads choice data from and saves results to ASCII files.

It can analyze Choice-Based Conjoint, attribute-specific DCM, or partial-profile choice designs. A free technical paper describing the software is available for downloading from Sawtooth Software's home page at [www.sawtoothsoftware.com](http://www.sawtoothsoftware.com).

## In2form and In2quest updates from SPSS MR

Chicago-based SPSS MR has enhanced its In2form and In2quest software packages. For the first time, In2form is being offered as a stand-alone product that can be used as a front end, or interface, for any data collection package. In addition, In2form remains integrated with In2quest, the computer-assisted personal interviewing (CAPI) package that employs a suite of software tools for designing and conducting surveys. With paper surveys being the most popular survey method worldwide, In2form also produces paper questionnaires in Microsoft Word, either through installed templates, or in tandem with a house style. Benefits of the upgrade include: availability of In2form as a stand-alone product; improved paper-assisted personal interviewing (PAPI) functions; enhanced import and export functions. For more information visit the company's Web site at [www.spss.com](http://www.spss.com).

## New version of Perception Analyzer

Columbia Information Systems (CIS), a Portland, Ore. maker of interactive group communication technology, has released WinPA Version 6.0 for the Perception Analyzer (PA), a wireless, dial-based system. The PA is used for focus groups and mixed quantitative/qualitative sessions in the fields of media and political research, ad testing, and almost all other types of research. The WinPA 6.0 software upgrade offers advanced survey research options, changes and enhancements for the moment-to-moment (MTM) question type, and



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As a QMRR reader, you know that in each issue we present case history examples of successful research efforts, examining the goals behind a project, its methodologies and how the research results were used to launch a new product, improve service, or fine-tune an advertising campaign, for example.

We're currently planning the next several issues of QMRR and we're looking for research projects in the following areas to profile: packaging research, service quality/customer satisfaction, focus groups, and health care research. If your company or organization has a research project in any of these areas that would make an interesting case history, we want to cover it!

A QMRR writer conducts the necessary interviews by phone and then writes a draft of the story. Because the case histories may touch on sensitive information, we allow interviewees to read a draft of the story before it goes to press. Please contact Joseph Rydholm, QMRR editor, for more information or to discuss a story idea.

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several additions in the realm of ease of use and operation. One example of an advanced survey research option is the new Seating Chart result screen. It shows results for each respondent in the relative positions he or she occupies around the focus group table. This makes it easy for the moderator, as well as the clients behind the glass, to visualize individual answers and opinions. Another example is the "Not Applicable" (NA) option for both scale and discrete question types, which removes NA respondents from the percentage base. Also new are user defined scale options for scale questions, a multiple response summary screen, and live data weighting. For more information, or to receive a demo CD, e-mail Geoff Atwill at [gatwill@cinfo.com](mailto:gatwill@cinfo.com) or call 800-769-0906. Or visit the company's Web site at [www.cinfo.com](http://www.cinfo.com).

## Study profiles Israeli tech firms

BetaSphere, Inc., Palo Alto, Calif., has released results of an in-depth survey of 65 Israeli technology companies attempting to penetrate the U.S. market. Israel, a country less than half the size of Maine, is home to nearly 3,000 high-tech companies. The majority have fewer than 100 employees, and many identify the U.S. as their primary target market. Since little has been written about the role of U.S. customer feedback in Israeli product development and marketing, BetaSphere surveyed Israeli companies to understand how they find prospective customers, beta users, and partners; how U.S. customer feedback influences product development; and how Israeli marketers assess U.S. acceptance of their products and services. Results can be found at [www.betasphere.com/israel\\_survey/contact.html](http://www.betasphere.com/israel_survey/contact.html) or by calling Paul Allen at 888-238-2243 x106 or sending an e-mail to [reports@betasphere.com](mailto:reports@betasphere.com).

## New on-line tool for researching physicians

London-based IMS HEALTH has launched FASTview, a high-speed research tool that enables pharmaceutical and health care companies to perform on-line physician research over the Internet and obtain survey results within 24 hours. In partnership with Tarrytown, N.Y.-based Physicians' Online (POL), an on-line medical information and communication network for physicians, IMS HEALTH's latest technology solution combines its pool of prescriber-level profiling information with POL's Internet access to 200,000 doctors in the United States. IMS HEALTH is a provider of information solutions to the pharmaceutical and health care industries.

FASTview delivers broad physician access and focused targeting of specific sample groups. It provides companies with answers to business questions that require quick market feedback — from introducing a new pharmaceutical product and testing a new promotional message to responding

to negative publicity and fending off competitive threats.

In addition to providing rapid responses, the alliance between IMS HEALTH and Physicians' Online provides the opportunity to target specific physician groups for Internet research projects. This new targeting capability allows pharmaceutical companies to create customized samples that focus on the highest-value physician audience for their research needs. Through IMS HEALTH's Xponent Profiler — a source of physician-level prescribing activity — clients are able to select the exact physician audience to include in a research project. For more information visit the company's Web site at [www.imshealth.com](http://www.imshealth.com).

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## Research Industry News

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and operates two access panel companies — tpi in Germany and Infratest Burke at Target-On-Line in France. In addition, Infratest Burke continues to be part of the Target Access Panel Consortium in Europe, which provides access panel services in five European countries. NFO and IPSOS will continue to cooperate on client projects currently in progress, as well as in areas of activity other than access panels.

**Macro Consulting** has moved to 1900 Embarcadero Rd., Suite 110, Palo Alto, Calif., 94303. Phone 650-812-7550. Fax 650-812-7551.

**Decision Making Research**, Washington, D.C., has received the Fairfax County Chamber of Commerce "Best Service Company of the Year" award, which is presented annually to the company judged as "providing the highest quality of service excellence above and beyond industry standards."

James Madden and Doris Walsh have formed **Paramount Market Publishing** (PMP), a publishing house that will focus on books by experienced market researchers. Besides

publishing its own line of books, PMP will also sell books of other publishers who focus on market segments and marketing tools. Potential authors can contact PMP at 607-275-8100 or visit its Web site at [www.paramount-books.com](http://www.paramount-books.com).

Jeri Meola, co-founder of **Satisfaction Management Systems, Inc.**, Minneapolis, has received the 1999 Lucent Technologies "Enhanced Business Through Communication Technology" award. She received the award as part of the National Association of Women Business Owners' 1999 Annual Awards Gala honoring achievements of Minnesota women business owners. Lucent Technologies sponsored this award for the woman-owned business that best uses technology to enhance overall business performance.

**Decision Data** has moved to Lakeside Office Center, 7962 Madison Ave., Suite A, Burr Ridge, Ill., 60521. Phone 630-734-8244. Fax 630-734-8245.

**Ebony Marketing Research** has opened a new full-service marketing research and focus group facility at 666 11th St., N.W., in Washington, D.C. For more information call 202-

628-4640.

**The Fieldwork Network** has added three locations: fieldwork Dallas (972-866-5800); fieldwork Minneapolis (612-837-8300) and fieldwork Seattle (425-822-8900).

Lockheed Martin/EDS has contracted **Optimum Solutions Corp.**, Rockville Centre, N.Y., to provide its proprietary FAQSS data capture system for processing the United States Census 2000 project.

**Allting, Inc.** has acquired San Francisco-based Socratic Software's Visual Q software for interactive Web-based surveys. The transaction, valued at approximately \$2 million, consists of both cash and royalty payments. Allting is a software firm whose principals have been key members of the Visual Q development and quality assurance team since the product's introduction in 1997. The company will continue to provide customer support and product assistance to existing as well as new customers and will continue developing the product.

**Focus Groups of Cleveland Survey Center** has opened its third research suite. The new suite features a large multi-purpose respondent room with multiple lines for access to videoconferencing, teleconferencing and Internet usage. For more information call Betty Perry at 216-901-8075.

Milwaukee, Wis.-based **Market Probe, Inc.**, has formed Market Probe India, a new subsidiary located in New Delhi, India.

**Wirthlin Worldwide**, a McLean, Va., research firm, and DS Griffen & Associates, a Scottsdale, Ariz., organizational development consulting group, have entered into an agreement for the continued delivery and further development of Advanced Strategy Lab, a technology which facilitates group interaction using networked laptop computers and electronic brainstorming software.



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## Turner

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for Turner, it all begins with looking at who is visiting their site and seeing if that aligns with their on-air market."

Spring also wanted to get satisfaction readings, understand why visitors came to the site, uncover any gaps between what site visitors wanted and what they were getting, and also examine functional, navigational and design issues.

### Gauge interest

Adopting the role of champion of the Digital Dashboard idea within the Turner Entertainment Group, Spring began meeting with the various factions throughout the company to gauge their interest level and buy-in for such a comprehensive approach. "Digital Dashboard was a departure from the one-time studies we had conducted. It looked at collecting, on an ongoing basis, 5,200 surveys year [100 per week] for each site, rolling them up and presenting them against some benchmarks," Spring says.

"After collecting a ton of information," Coates says, "we would be able to give the particular audiences within Turner Entertainment Group the ability to drive the car, as it were. That's why we used the digital dashboard metaphor. They could make changes to their content in week one and be able to see how that impacted their audience profile and site satisfaction ratings in week two."

### Practical problems

As early iterations of the Dashboard idea were circulated around Turner Entertainment Group, some basic, technical problems cropped up. People didn't have the latest versions of Netscape Navigator or Internet Explorer, which were needed to use the Digital Dashboard system. The interface didn't work well on Macintosh computers.

Burke worked to overcome these hurdles but the problems raised early

flags with people in the organization who were already skeptical, Spring says.

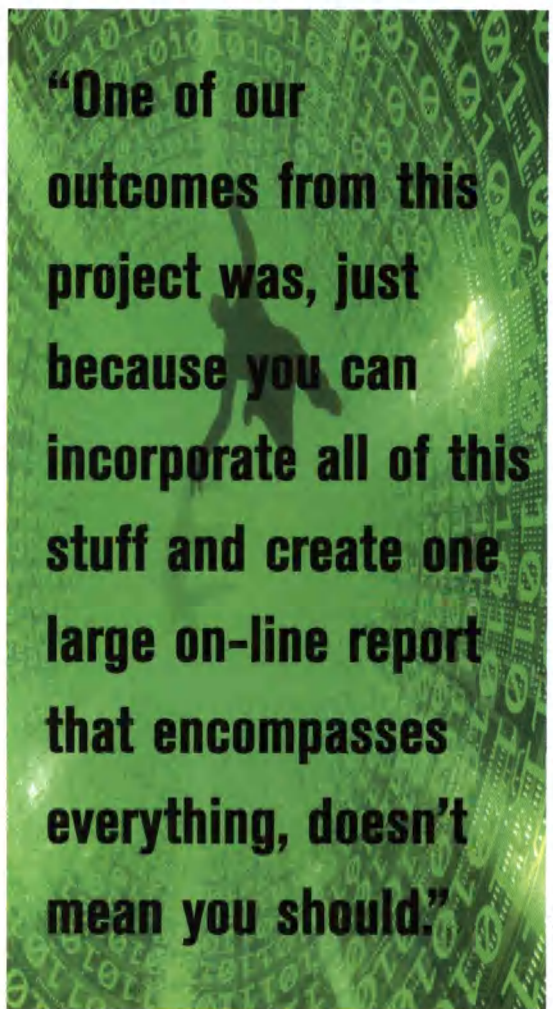
The Webmasters of the individual sites balked at the sheer amount of data the research would generate. Their perception was that having to monitor and react each day to information about their site would add more work to their already overloaded schedules.

In addition to being understaffed and overworked, the Web units were also underfunded and as they learned more about the cost structure for Digital Dashboard, they realized they didn't have money in their budgets for a significant research function. "Anything higher than free was too high," Spring says. "I tried to marshal some resources and create some structures around it to make the costing more efficient but we couldn't get it down to a level that would work for the Webmasters."

And without a push from each network's research department, the Webmasters couldn't be convinced that Digital Dashboard deserved their support, Spring says. "Early on, I didn't get the buy-in from researchers at those respective networks to push the idea forward. The Webmasters didn't see the value because they were so caught up in their day-to-day work."

In the end, the mountains of real-time data proved to be too much, Coates says. "I would say the epitaph on this experience was: overwhelming. The Turner people were on all fronts overwhelmed with all the data they didn't need instead of receiving the nugget that they did need.

"One of our outcomes from this

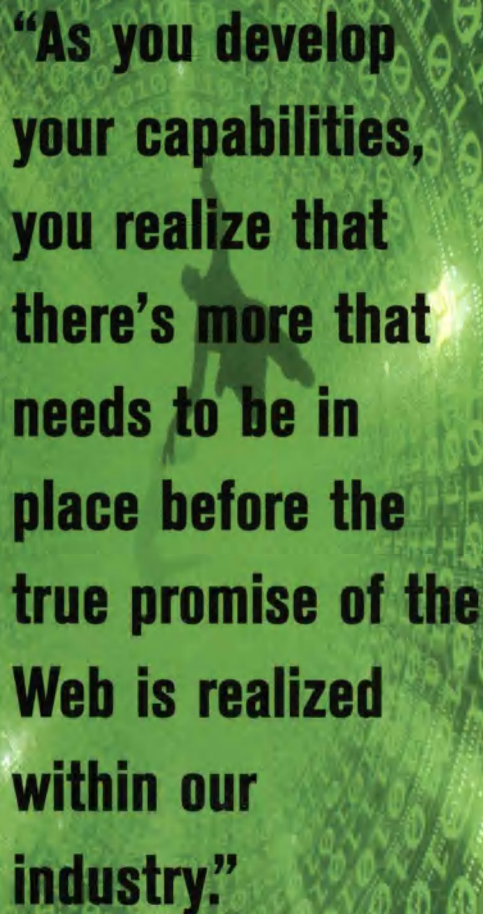


project was, just because you can incorporate all of this stuff and create one large on-line report that encompasses everything, doesn't mean you should. You start linking together audience profile and satisfaction and tactical performance and media consumption and you end up with this big unwieldy thing. And from Turner's point of view it became too complex too quickly."

Rather than a real-time monitoring of visitor opinions on their sites, the Webmasters said they would be content with an occasional research check-in, once a year or twice a year at most, to do some audience profiling and obtain feedback on critical issues.

"The Webmasters wanted the audience profile," Coates says. "The research department was certainly interested in some of the other stuff. Their executive management was interested in the consumption aspect.





**“As you develop your capabilities, you realize that there’s more that needs to be in place before the true promise of the Web is realized within our industry.”**

But to put all those things together and throw them into the Digital Dashboard initiative was certainly ambitious. What held us back in terms of realizing the potential of the real-time reporting was the fact that we were trying to report not on a single car but on a whole freight train.”

#### **Not soured**

The trials of shepherding Digital Dashboard certainly haven’t soured Spring on the merits of on-line research. In his experience, it’s been “phenomenally successful.”

Cooperation rates are high — tests for Digital Dashboard earned a 41 percent rate in some cases. And 20 percent of first-time visitors to the sites, who weren’t taken through the survey due to their lack of experience with the site, cooperated and took the survey later after being contacted by e-mail with a second chance to participate.

Participation levels also can depend on the reason people are visiting the site, Coates says, adding that the Turner sites benefit from their entertainment orientation. “We’ve done similar methodologies with Intel’s support site and with a situation like that, where people are having actual problems with their PC or chip set, they don’t want to complete a survey. The participation rates were lucky to climb into the double digits on that site. So a lot of the success in terms of participation has to do with whether people are actively engaged in a specific task that they really need to get through or, as is the case with the Turner sites, if they’re just surfing or planning their television viewing.”

As the novelty of Web research wears off, incentives are going to play a bigger role in enticing participation. Spring says that the old standby, a cash sweepstakes, has worked well, but charitable contributions have also been popular. They make the most sense, of course, if they’re related to the subject of the research or are tied into the entity sponsoring the research. For example, the Turner Classic Movie network has conducted studies which give two dollars for every completed survey to a film preservation fund in the respondent’s name.

Spring has tried to gather feedback from potential site visitors as well as regular visitors. “You can use panels for that or e-mailed site feedback that you have saved or other areas of registration where you have asked people if they would participate in research...any resource that you can use to locate people who have the criteria of your site visitors but haven’t visited it yet. Be sure to par-

allel that with the research with regular visitors so that you’re not working in a vacuum. This way you have a potential to grow your site traffic rather than maintain it.”

#### **Needs change**

A Web site’s research needs will change depending on who claims ownership of the site within the company or organization, Coates says. For those on the system administration side, research may mean analyzing the server log file and measuring and evaluating the hits and the click stream. “As the Web site becomes more a major part of the corporate entity, then the traditional marketing, advertising, and research forces begin to play a dominant role,” he says.

And the amount of research you do may also depend on how much traffic your site gets and how often it changes. “If your Web site is growing by leaps and bounds with people visiting more often and staying longer, you might want to take on more frequent research. In our case, for some of the incrementally-growing sites, the perceived need was much less,” Spring says.

Coates says watching media companies come to terms with the Internet has been a very interesting experience. “In theory, they should be the best-equipped to deal with the immediate implications of the Web because it’s just another medium, after all. Early on it was difficult to tell to what extent this new medium is going to upset traditional media and so the false hope that the Web was a simplistic secondary format to the main format was an understandable initial reaction.”

#### **Necessary tools**

As the Digital Dashboard example shows, at this point the reach of real-time Web-based research may exceed its grasp. “You can report things in real time,” Coates says, “but does that mean that the client will have the need or all the necessary tools to take advantage of it?”



The technology exists to capture and manipulate a huge amount of data from on-line research. But to truly take advantage of the data, plain old hardware issues will have to be overcome. In many cases, on the client side, computer systems need to approach state-of-the-art to take full advantage of the data processing and analysis. And on the respondent side, colorful graphics and streaming media will make a snazzy survey experience but not when they're being forced through 28.8 modems into aging PCs.

"There's a lot of potential surrounding what the Internet can do for our industry," Coates says. "As you develop your capabilities, you realize that there's more that needs to be in place before the true promise of the Web is realized within our industry. There are a lot of research companies that have a strong functional capability on the data collection side with emerging on-line reporting capabilities, but in terms of really revolutionizing our industry and bypassing the traditional mechanisms with an end-to-end Web solution, there is more that needs to be in place."

### Quick to react

Coates says that the research industry has been quick to react to the promise of the Web, contrary to what its members may feel. "In the research industry we're often hard on ourselves but we're very quick to react. While many industries are just coming to terms with the Web, I can't name a single [research] company that hasn't gotten involved at some level. Every major organization that you talk to has got something underway, or they've got a partnership that gives them the [Web research] capability."

But in the rush to embrace a new medium and meet client wants and needs, the industry can't lose sight of the need to conduct methodologically-sound research. "Our industry is so client-driven that when the issues touch the Web we're there and when real-time reporting is a necessity


we're trying to quickly develop the capability too. Along the way we have to ask ourselves whether all of the capabilities that we are developing are resulting in better research. While the rush to the Web has temporarily bypassed some important validation issues for some companies, I think that validation is a strong and recurring theme for this year. It seems like some of us early pioneers in the Web took giant strides forward and now we're stepping back to make sure we're heading in the right direction."

### Still alive

The Digital Dashboard idea is still alive, but, at least in the case of Turner Entertainment Group, it may be used on a smaller scale. "With adaptation it could be valuable on a smaller scale, as a slimmer, toned down profiling tracker that is less ongoing and more opportunistic," Spring says.

"At some point we may in fact

wind up with something that is very close to what we started off with," Coates says. "After people have made their way up the learning curve, after the Webmasters have gotten comfortable with seeing their demographic profile day-to-day and seeing it change and seeing how what they do impacts satisfaction, they might be interested in finding out more."

The real-time benefit didn't really reach fruition, but it will, Coates says. "Overall, the data collection went smoothly, Digital Dashboard worked as a convenient reporting capability. But as for the notion of creating this real-time dashboard that would allow people to drive as they go and see how the decisions they've made have impacted things and then feed that back into the process, more work needs to be done by both clients and research vendors to refine this capability. But I think the industry is aiming towards that and when we get there it's going to change the nature of research forever." 

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Hispanic Qual./Quant. Research-National  
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continued from p. 8

Monument, Col., as a vice president. In addition, **Collette N. Kakuk** has joined Taylor Nelson Sofres Intersearch in Southern California as a vice president.

**John C. Holt**, former chairman and CEO of *ACNielsen* has joined the board of advisors of *Streamware Corporation*, Norwood, Mass.-based Streamware is a market research and management software firm specializing in the information needs of the vending and food service industries.

**Bart Zehren** has joined *Applied Marketing Science*, Waltham, Mass., as a principal. An independent consultant in marketing research the past four years, Zehren is a former vice president of marketing research, Information & Planning Services for Citicorp (now Citigroup) Diners Club.

**Gregory C. Ellis**, executive vice president and chief operating officer of Princeton, N.J.-based *Opinion Research Corporation*, was elected to the company's board of directors.

**Dane May** has been named chief financial officer of *Clearwater Research* at the company's Boise, Idaho, office. At the firm's Council, Idaho, office, **Janette Schill** has been promoted to data collection assistant supervisor, and **Jennifer Madsen** and **Leola Rice** have been promoted to data collection helpers.

*Children's Television Workshop*, New York, has appointed **Susan Royer** to the newly created position of vice president for research strategy.

*Modem Media*, a Norwalk, Conn., builder and marketer of customer-

focused e-businesses, has named **Cathy Peterson** senior director - Strategic Research Services.

After 34 years in the research and polling industry, **Barry Jacobs** has announced his retirement. Jacobs worked as research director at *Pepsi-Cola Company* in the '70s, co-founded *Moskowitz Jacobs Inc.* in 1981 and finished his career as a vice president of Phoenix-based *Behavior Research Center*.

**Walter Lindenmann**, SVP/director of research at *Ketchum*, a New York public relations firm, will retire early next year. He will begin a part-time schedule this fall as *Ketchum* conducts a search for a new director.

**Robert Costantini** has been named chief financial officer at *FocusVision Worldwide*, Stamford, Conn.

*Sigma: Research Management Group*, Cincinnati, Ohio, has named **Steven Schulz** vice president in



Schulz

charge of quantitative services.

Stamford, Conn.-based *ACNielsen Corporation* has named **Brian D. Chadbourne** president of *ACNielsen Europe*. He will be based at the company's Waterloo, Belgium European headquarters.

**George Gubert** has been named president of *SNAP Software*, which supplies a tool used to analyze

Nielsen Sweeps ratings data.

*Information Resources, Inc.*, Chicago, has appointed **Rick Kurz** division president, strategic business development and planning.

*The Council for Marketing and Opinion Research (CMOR)* recognized the contributions of its early leadership at a commemorative ceremony held at the Helmsley Hotel in New York City in May. "These individuals stepped forward to lead the industry in tackling our two most critical issues — restrictive legislation and declining respondent cooperation," says CMOR President Diane Bowers.

"From a handful of founding supporters, these leaders made CMOR," Bowers says. "While we have many challenges before us, thanks to these individuals we now have the foundation and armament in place to continue CMOR's good and important work."

Those honored were: **Harry Heller**, chairman of The Heller Research Group, who served as CMOR co-chair, 1992-1994; **Tod Johnson**, chairman and CEO, The NPD Group, Inc., cited as founding co-chair, 1992-1994; **Larry Mock**, vice president, consumer & market knowledge, Procter & Gamble, recognized as CMOR co-chair, 1997-1998; **Mimi Nichols**, president, Nichols Research, cited as CMOR secretary/treasurer, 1992-1994; **Amy Pizzarello**, vice president, marketing research, American Express Corporation, noted as CMOR co-chair, 1994-1995; **Arthur Shapiro**, executive vice president, marketing and strategy, Seagram Americas, division of Seagram Spirits and Wine Group, who served as CMOR co-chair, 1992-1994.

**Patrick Quigley** has been named director of sales of the U.S. operation of *SPSS MR*, Chicago.



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## Trade Talk

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the legitimate ones.

It's clearly something that needs to be addressed and the research organizations are actively engaged in figuring out how to do so. The Field and Joint MRA/QRCA committees are developing task forces to examine and implement the following measures: 1) require respondent identification as an industry standard; 2) develop better screening and rescreening instruments to detect cheaters/repeaters; 3) establish centralized tracking of respondent participation in major cities; and 4) measure and monitor cheating and repeating to see if the implemented measures are effective.

### Reporting research results

Terry McCarthy from Directions Research gave a nice talk on reporting and presenting research results. Here are some of his best tips:

- Get the dull stuff over with right away. Your audience will give you a few minutes to be boring, but after that, you had better hold their interest.
- When planning the presentation development process, budget 10 percent of your time for analyzing the results, 30 percent for assembly and rehearsal, and 60 percent for putting the charts together.
- The perfect chart is one that doesn't have to be explained and in which the most critical finding is the first thing everyone notices.
- Some don'ts: don't detail your valiant-but-failed attempts to uncover the truth in the data; don't include beautiful charts that confuse or contain no value; don't use jargon-laden charts; don't include data that conflicts with the overwhelming majority of the evidence; don't beat bad news to death.

### Going overseas

On Friday morning I attended an information-packed


primer on conducting international research delivered by Simon Lunn of Research International USA. While the session was geared more toward those on the research supplier side, Lunn did have some good advice that applies to client-side researchers who may have to choose an overseas research supplier. When you find a supplier you're considering working with:

- ask for the names of some of their other U.S. clients and get references;
- ask them to describe exactly how they propose to sample and why;
- ask them how they validate;
- ask them who does their interviewing (is it students, stay-at-home moms?);
- get a feel for their business (don't be afraid to ask questions);
- make sure they ask you the right questions back.

Lunn's overall message was to assume nothing and verify everything. Though researchers share a common language, keep in mind that research is not the same in every country. There are a host of cultural, infrastructural, and political factors to consider and if you leave room for a misunderstanding, you'll probably get one.

\* \* \*

### War Stories needs your help!

As some of you may have noticed, War Stories has been absent from our June and July issues. Fear not! War Stories compiler Art Shulman assures me he'll be back with material in our October issue. Between running his own research company and moonlighting as a playwright (his latest, *The Rabbi and The Shiksa*, has received some nice reviews from the L.A.-area press!), he hasn't had time to track down those humorous research anecdotes we all know and love. Why not help him out? If you have a good story, or know someone who does, drop Art a line (phone 818-782-4252, fax 818-782-3014, e-mail artshulman@aol.com). 

## Listing Additions

Please add the following firm to the 1999 Directory of Telephone Interviewing Facilities:

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Ph. 901-754-9437  
Fax 901-755-8075  
E-mail: steven@ethridge.com  
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**West Coast:** Lane Weiss, Lane Weiss & Associates, 10 Black Log Road, Kentfield, CA, 94904. Phone 415-461-1404. Fax 415-461-9555.





# Trade Talk

By Joseph Rydholm, QMRR editor

## Notes from the MRA conference in Boston

In early June I traveled to Boston to attend the Marketing Research Association's annual conference. Thankfully, by the time I arrived, temperatures had cooled back into the 60's from the 90+ readings that had scorched the city during the previous week (though I of course packed for tropical conditions and thus needed to borrow a jacket during the chilly evenings). At the various presentations, meals, and events I attended during the three-day conference I had fun meeting people whom I've spoken to on the phone, putting faces to names and voices. As always, I found the folks in the research industry to be engaging, enthusiastic and committed to their profession.

When I wasn't traipsing along the Freedom Trail to learn more about our nation's history or trying to comprehend the scale of the Big Dig, I sat in on some very interesting conference sessions.

of National Data Research led a discussion on findings from a joint MRA/Qualitative Research Consultants Association (QRCA) study on cheaters and repeaters. Cheaters are focus group respondents who don't meet study specifications as shown on the screener and lie in order to participate in the focus group and receive the incentive payment. Repeaters attend focus groups more often than once every six months but don't admit it when asked during the screening process.

While the exact scope of cheating/repeating is tough to quantify, anecdotal evidence suggests the problem is common. Using a system like Sigma Validation to track and identify research respondents can help weed out the so-called professional respondents who participate in research for the monetary reward. But until its use somehow becomes mandatory, unscrupulous respondents will still mingle with

### Cheaters/repeaters

Anndel Martin of Opinions Unlimited and Val Maxwell

continued on p. 109

### Dilbert

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Cincinnati .....Aug. 2-4	San Diego .....Nov. 15-17		
Minneapolis .....Aug. 16-18	Taipei, Taiwan .....Nov. 29-Dec. 1		
New York .....Aug. 30-Sept. 1	New York .....Dec. 13-15		
Chicago .....Sept. 27-29			
<b>103. Marketing Research for Decision Makers</b>	<b>\$1,300</b>		
HoChiMin City, Vietnam .....July 22-23	Cincinnati .....Oct. 4-5		
<b>104. Questionnaire Construction Workshop</b>	<b>\$1,700</b>		
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<b>new</b> Dates and locations to be announced			
<b>201. Focus Groups: An Introduction</b>	<b>\$1,300</b>		
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<b>202. Focus Group Moderator Training</b>	<b>\$2,300</b>		
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Cincinnati .....Aug. 24-27	Cincinnati .....Nov. 2-5		
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Cincinnati .....July 26-28	Cincinnati .....Nov. 8-10		
<b>204. Qualitative Research Reports</b>	<b>\$1,300</b>		
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<b>205. Qualitative Research with Children</b>	<b>\$700</b>		
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<b>301. Communicating Marketing Research</b>	<b>\$1,700</b>		
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Cincinnati .....Aug. 23-25	New York .....Nov. 29-Dec. 1		
Chicago .....Oct. 6-8			
<b>401. Managing Marketing Research</b>	<b>\$1,300</b>		
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<b>503. New Product Forecasting Models</b>			
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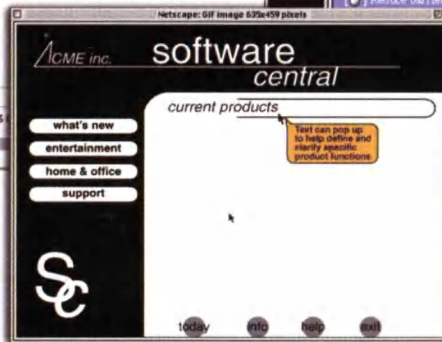
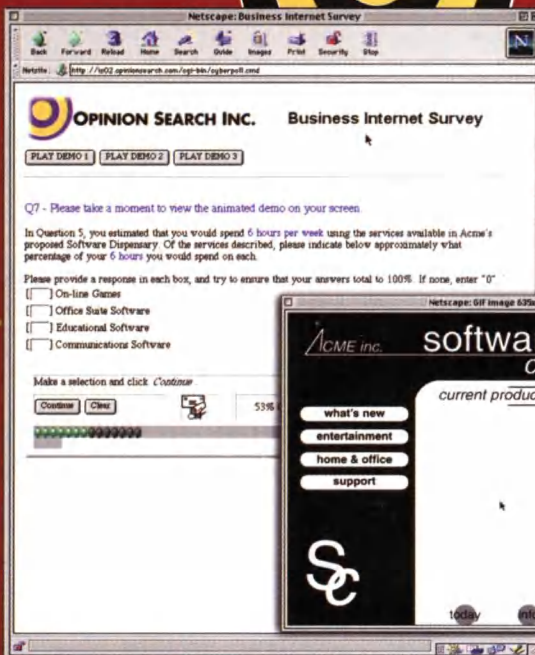


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