

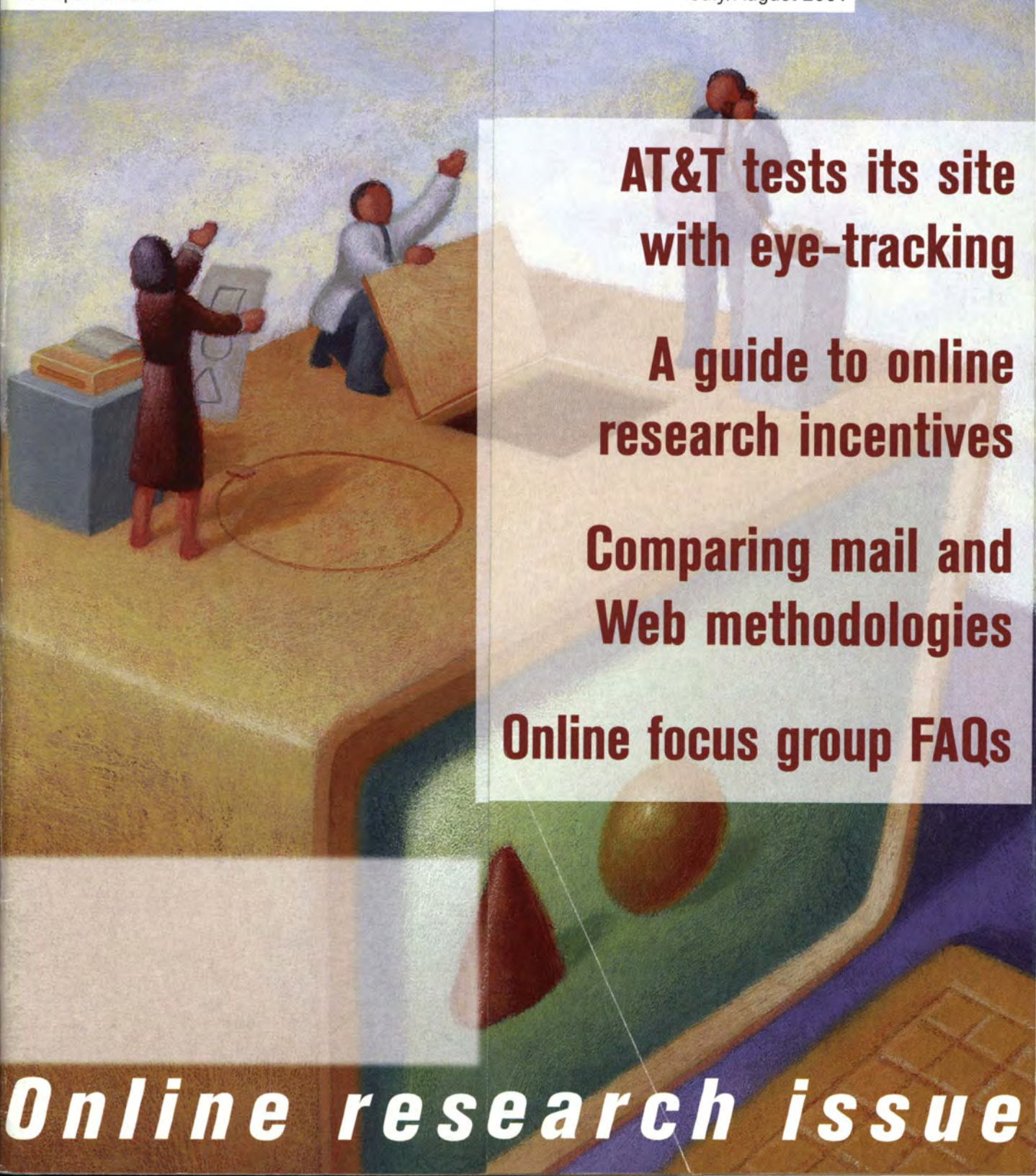


QUIRK'S

Marketing Research Review

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July/August 2001



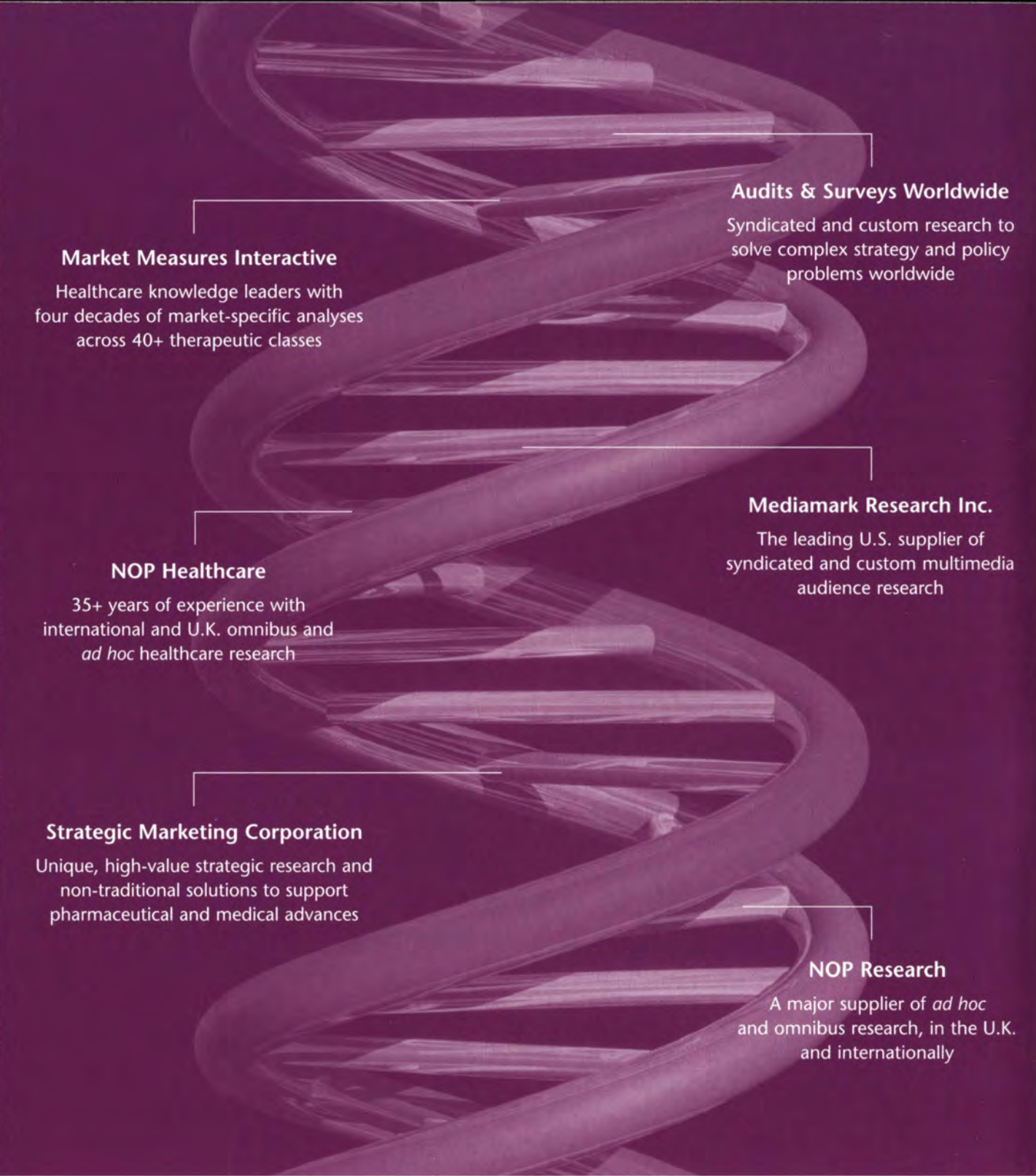
**AT&T tests its site
with eye-tracking**

**A guide to online
research incentives**

**Comparing mail and
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Online focus group FAQs

Online research issue



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Marketing Research Review

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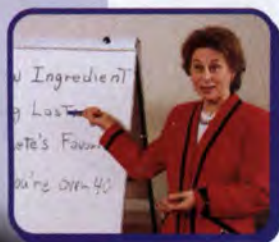
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Shipping and handling charges: necessary evil

New York based Jupiter Media Metrix reports that while shipping and handling (S&H) charges have dissuaded 63 percent of consumers from completing online purchases, nearly



half (45 percent) of retailers say they are losing money on shipping and handling costs. New Jupiter retail infrastructure research reveals that companies need to gain their customers' trust regarding S&H charges because the majority of consumers are looking at these costs before making purchases. To minimize both customer distrust and merchant risk, Jupiter analysts advise retailers to view S&H charges as a breakeven proposition and to base S&H charges on the weight of packages, rather than on order size.

"The latest Jupiter research suggests that consumers are wiser to the true costs of shipping than retailers think. Consumers who have mailed packages via UPS, the USPS, or some other shipper, are well aware of the fact that shipping costs are driven by weight, rather than by the value of the package," says Ken Cassar, Jupiter senior analyst. "Online retailers must begin basing their shipping charges on weight and distance because that is what they are familiar with. Retailers that believe that they're simplifying

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Study looks at leisure trends

Americans plan on doing more jogging, but their interest in playing ice hockey is on the decline. Active vacations such as swimming and hiking are on the rise, but Americans' interest in racquetball and surfing is not as great as it once was. Americans are using the Internet more as a leisure activity, but they also have an increased desire to remain physically fit. Those are just some of the findings of Bear Stearns' leisure trends survey. The survey, conducted in conjunction with Yesawich, Pepperdine & Brown, attempts to shed light on how Americans spend their leisure time and money and predict leisure trends moving forward.



The Bear Stearns leisure survey polled more than 1,000 American consumers above the age of 18. The questions focused on past and future participation levels for a variety of leisure activities. Using the data, the analysts were able to calculate an anticipated "net gain" for each activity. For a given activity, the net gain is the difference between the proportion of American adults who expect to participate more frequently minus the proportion of American adults who expect to participate less frequently. The difference is expressed in percentage terms.

According to the survey, the majority of Americans feel they do not have enough leisure time, want more pleasure out of life, and say they try to engage in new experiences. About one-half of the adult population reported that when they have spare time, they like to relax and do nothing at all.

The majority of Americans tend to enjoy more passive leisure activities, such as watching television or going to the movies, as opposed to vigorous activities like aerobics, jogging and weight training. However, the survey did find participation levels for physical activities could increase significantly during the coming years.

The survey also evaluated which spectator sports are well-positioned for future growth. Professional football and basketball top the list, while sports such as college baseball, women's professional basketball, and professional soccer could face a decline.

The majority of Americans responded favorably to the concept of travel and made it clear that they do so whenever they get the opportunity. Americans also hunger for new experiences, which could lead to significant increases in the travel business.

The survey found active vacations appear to be on the rise for many Americans. Swimming, jogging, hiking, fishing and boating should all experience net gains, according to the survey. However, nearly 50 percent of all other sporting activities studied will have an expected loss in participation by adults on vacation during the next two years, including many popular sports such as snowmobiling and surfing. Finally, the survey found most Americans rank visiting a beach or a lake or just spending time with family and friends at the top of their lists for vacation activities — a trend that bodes well for companies that serve those needs.



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Names of Note

Fundamental Research Group, Inc., Southampton, Pa., has named **Marguerite Genesio** senior project manager. In addition, **Valarie Toroniewski** has been promoted to business manager.

NFO WorldGroup, a Northwood, Ohio, research firm, has promoted **Lisa Intriери** to marketing manager for the company's Minneapolis office. In addition, **Fern Schapiro** has been named senior vice president of NFO North America.



Schapiro

Passerieu

Censydiam, an Antwerp-based research firm, has named **Katherine Passerieu** as managing director of its U.K. office.

Marlene Yanovsky has joined *The Willard & Shullman Group, Ltd.*, a Greenwich, Conn., research firm, as executive vice president. Yanovsky will report to **Sharon Humphreys**, who joined the company in May as managing director.

Nicole Douglas has joined *Western Wats B2C*, a Provo, Utah, research firm, as a client service representative.

Jan Reisman has joined *Message Factors Inc.*, as vice president in the company's Memphis headquarters.

Peggy Moylan has been named director of brand intelligence for New York-based *J. Walter Thompson North America*, a new position. Moylan has served in senior research and planning posts for JWT Detroit, where she will remain headquartered.

New York-based VNU, Inc. has named **Michael P. Connors** chairman and chief executive officer of *VNU Media Measurement & Information*, comprising all of the media and entertainment information units of VNU and ACNielsen. In addition to his new post,

Connors will continue as vice chairman of ACNielsen. He will also remain a member of the ACNielsen Board.



Connors

Spring

Fred Spring has been promoted to vice president of research at *Turner Classic Movies* and *Turner South* in Atlanta.

Farmington Hills, Mich., research firm *MORPACE International* has named **Linda Retford** vice president of planning.



Retford

Henry

Vickie Henry, chief executive officer of *Feedback Plus*, a Dallas research firm, has been elected president of the *Mystery Shopping Providers Association*.

Hugh E. Sawyer, president and CEO of Irving, Texas-based CRM and marketing research firm *Aegis Communications Group, Inc.*, resigned in June to join *Allied Holdings, Inc.* in Atlanta as president and CEO. **John R. Birk**, chairman of the board of directors of Aegis, will assume the role of

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Technique mixes qualitative, quantitative

Seattle-based research firm Global Market Insite (GMI) and London-based research firm QualiQuant have formed a joint venture for the development and marketing of the QualiQuant Toolkit. Using GMI's Web-based software, the QualiQuant Toolkit will allow the fusion of qualitative and quantitative research to be performed, both online and offline, on a scaleable, multilingual, self-administered or interviewer-assisted basis. QualiQuant Toolkit is integrated with GMI's Net-MR platform for market research as well as GMI's global consumer panel. The product incorporates visual, interactive projective questions adapted from techniques more commonly applied to group discussions. This allows the collection of qualitative data in a quantitative context. The techniques can also be applied to smaller qualitative-type unstructured interviews. For more information contact Claire-Juliette Beale at 301-599-0555 or at cjbeale@gmi-mr.com.

OpenSurvey debuts first open standard software effort

TabsML, the first OpenSurvey standard to reach implementation level, was unveiled in June at the 10th Melinco User Group Meeting at the Marlborough Hotel London. OpenSurvey is an organization whose mission is to improve the usefulness of survey research software through the promotion and development of open standards and other cooperative efforts. TabsML is an XML representation of survey table content, intended to cover all aspects of annotation and numeric data. As well as providing a pathway between traditional crosstab packages and the newer table delivery systems, it is also expected that it will be a way for

end users to consolidate tables from different sources and different time-periods (i.e., for continuous surveys). Initially designed by E-Tabs under OpenSurvey's sponsorship, the standard has been implemented by Merlinco Ltd. (tables exported by MERLIN and MERLINPLUS), E-Tabs (imported by E-Tabs Professional) and DataTree (imported by the TeraTree suite). Version 1.1 of the standard (as represented by an XML Schema, and detailed documentation) can be inspected and downloaded from www.opensurvey.org. The existing implementors intend to develop it further, and anyone interested in joining the development group should contact info@opensurvey.org.

Pre-test commercials over the Web

Atlanta-based research firm Marketing Workshop, Inc., has announced a new service to pre-test television commercials over the Internet. In conjunction with ActiveGroup, the commercial is streamed over the Internet to a sample of qualified households who then answer questions about it. Because the commercial is streamed rather than downloaded the test commercial cannot be seen more than once, and cannot be copied, e-mailed, downloaded, or saved. The system checks the respondent's computer to make sure it has the proper bandwidth and other equipment needed to see and hear the commercial. For more information contact Jim Nelems at 770-449-6767 or visit www.mwshop.com.

Greenfield packages concept screening services

Greenfield Online, a Westport, Conn., research firm, has announced a package of services designed to speed

up concept screening and also provide a rating system to separate winners from losers. The company has packaged its online survey technologies with best practices for concept screening, creating a new product, SuccessScreen. Concepts can be tested as text only or with visuals. Comparisons are made on key concept screening measures. SuccessScreen relies on proprietary software and works by linking Web-enabled consumer surveying to a normative database that "scores" new concepts relative to previously tested concepts, through FYI Worldwide, a modeling, data analysis and forecasting company. For more information contact Lis Tanz-Harrison in the company's St. Louis office at 314-316-3050.

Web survey software from the Analytical Group

The Analytical Group, Inc., Scottsdale, Ariz., has released QueryWeb/WinQuery 2.0, software which lets users securely host WinQuery studies on the Web. QueryWeb uses WinQuery 2.0 to create studies, so there is no need for any custom CGI, Java, or other scripting. Once a study is created, WinQuery's Internet-ready files are copied to a secure location on a QueryWeb Internet/intranet server. Using this approach, questionnaires are ready to run on the Web within minutes. Since the questionnaire logic is shared between its three modes, a WinQuery 2.0 study developed for use in phone centers and/or mail surveys may also be used for Internet viewing, with all respondent data being collected in a single location. The company can also host your WinQuery 2.0-generated questionnaires for you. For more information visit www.acsinfo.com or call 800-946-2767.

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News notes

The Online Consumer Panel of **The NPJ Group**, Port Washington, N.Y., has reached 900,000 members worldwide, including 750,000 U.S. consumers.

KidzEyes, an online kids research panel from Chicago-based **C&R Research Services**, now has over 6,300 "permissioned" panelists in compliance with the Children's Online Privacy Protection Act (COPPA).

The Canadian subsidiary of

Milwaukee-based **Market Probe** has been restructured into two research divisions: a custom research and consulting division, and a customer satisfaction and loyalty division. Executive Vice President Carol French will head the custom research and consulting division. John Morton has been named vice president and head of the customer satisfaction and loyalty division.

Total Research Corporation, Princeton, N.J., has announced a new stock repurchase plan for one year ending June 30, 2002. The company's board of directors has authorized the

company to repurchase from time to time over a one-year period in open market transactions up to one million shares of the company's common stock, or approximately 7.4 percent of outstanding shares. The company currently has 13,523,157 shares of common stock outstanding, 14,262,812 shares on a diluted basis.

SPSS Inc., Chicago, has formed of a new division, **CustomerCentric Solutions**, designed to extend the company's experience in analytical technology and enterprise-wide solutions to help derive greater value from customer



The Institute for International Research (IIR) will hold a conference on ethnographic/observational market research at the Hilton San Diego Resort July 25-27. For more information visit www.iir-ny.com or call 888-670-8200.

Megaputer Intelligence will hold a two-day seminar, "Data, Text and Web Data Mining," at the following locations: Chicago - August 2-3; San Francisco - August 24-25; New York - August 31-September 1. For more information visit www.megaputer.com/services/seminar_dtwm.php3.

The ninth Sawtooth Software Conference on Acquisition and Analysis of Market Research Data will be held on September 12-14 in Victoria, B.C., Canada. In addition to the general conference, there will be optional tutorials, clinics and workshops. Attendance will be limited to 250 participants. For more information call Marilyn Stanford at 360-681-2300 or visit www.sawtoothsoftware.com.

Strategy Research Corporation will hold its U.S. Hispanic seminar on: September 13 at the Hilton Miami Airport; September 19 at the New York Helmsley Hotel; September 21 at the Omni Los Angeles Hotel; and September 25 at Le Meridien in Dallas. For more information visit www.strategyresearch.com or call 305-649-5400.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its annual congress in Rome on September 23-26. For more information visit www.esomar.nl.

Tragon Corporation will hold a workshop titled

"Consumer Research Strategies for Brand Management" on October 1-2 at the Sheraton Palo Alto, Palo Alto, Calif. For more information call 800-841-1177 or visit www.tragon.com.

The Council of American Survey Research Organizations (CASRO) will hold its annual conference on October 10-12 at the Ritz Carlton Amelia Island, Amelia Island, Fla. For more information visit www.casro.org.

The Institute for International Research (IIR), in conjunction with the Interactive Marketing Research Organization (IMRO), and the American Marketing Association, will hold a conference on online research and usability on October 17-19 at the Fairmont Hotel in San Francisco. For more information visit www.iirusa.com.

The International Quality & Productivity Center (IQPC) will hold its conference on online market research and Web-based surveys on October 23-24 at the Hotel Nikko in San Francisco. For more information call 800-882-8684 or visit www.iqpc.com.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on qualitative research on October 28-30 in Budapest. For more information visit www.esomar.nl.

The Advertising Research Foundation (ARF) will hold its annual Week of Workshops on October 29 to November 1 at the Westin Michigan Avenue, Chicago. For more information visit www.arfsite.org.

relationship management (CRM) initiatives.

Millward Brown IntelliQuest, an Austin, Texas research firm, has announced the expansion into Europe of the IntelliQuest Technology Panel, a group of pre-profiled users and buyers of technology products and services. The new coverage includes panel members from France, Germany and the U.K.

Acquisitions

Germany-based **GfK Group** has acquired a 51 percent stake in the **Martin Hamblin Group**, a U.K.-based research firm, and will take 100 percent ownership of within six years. The Martin Hamblin name and brand will continue as will the management. GfK GB, part of the GfK Group, will become part of the consumer and business division of Martin Hamblin.

Istanbul-based **ProCon GfK Business Information Services Group** has acquired **IBS Marketing Research**

Services from IBS Research & Consultancy, Istanbul. Under the new structure, a new IBS Unit will be created within ProCon GfK.

London-based **United Business Media** has announced a definitive agreement to acquire **Allison-Fisher International Inc.**, a supplier of pre-purchase syndicated market research to the U.S. auto industry.

Alliances/strategic partnerships

Stamford, Conn., research firm **InsightExpress** is working with **Microsoft** to deliver direct access to its services through Microsoft's new Office XP suite. Using templates and a library of prewritten questions, users can develop, deploy and complete a survey in 24 to 48 hours. They can also choose to receive their results either on the Web or in Microsoft Excel spreadsheets.

Looking Glass, Inc., a Denver consumer marketing information company, has formed an alliance to combine its

Cohorts household-based market segmentation system with the consumer behavior and psychographic market research of **Simmons Market Research Bureau**.

Scottsdale, Ariz., research firm **Cahners In-Stat Group**, has partnered with **DCICommunity**, an online IT information resource. Consisting of three specialty IT Web sites, DCICommunity offers free membership to business and IT executives, providing immediate access to technology information. Cahners In-Stat will provide each DCICommunity with technology-related research highlights as well as a listing of relevant In-Stat reports available for purchase.

Encino, Calif.-based **E-Poll**, an audience research firm, has announced an agreement with **Twentieth Television** and **Carsey-Werner Distribution** to develop The EDGE, a suite of polling applications. In addition, The EDGE

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Qualitatively Speaking

Qualitatively Speaking is a regular column in which a revolving cast of authors offers their thoughts on various aspects of the multifaceted world of qualitative research — in 1,000 words or less! Submissions are welcome. Send your ideas or manuscripts to Quirk's Editor Joe Rydholm at joe@quirks.com.

Don't say the f-word

By Carey Rellis

Editor's note: Carey Rellis is a moderator-consultant with Primary Insights, a Lisle, Ill., research firm, and can be reached at 920-720-6399 or at carey@primary-insights.com.

Last year, while participating in a trend seminar in New York City I unexpectedly learned something about qualitative research: don't say the f-word. That is, if you or your consumer insights are going to stand up as being even remotely credible, don't say they came from focus groups.

Call your research method anything else, call it friendship groups, home visits, round-robins, coffee klatches, but nevermore let us invoke the traditional and omnipresent focus group.

Focus groups have been (and continue to be, I might add) a staple method of conducting qualitative research. But perhaps the very length of their history means that they simply aren't trendy enough for the cutting-edge crowd of researchers, marketers, and ad agency creatives at the seminar.

Yet the newer terminology — like friendship groups — for a gathering of people who “focus” on a topic of discussion isn't really all that new. Furthermore, these exciting, supposedly emerging methods are all simply variations on the basic premise of group discussion.

At the seminar, after gaining sufficient courage, I finally raised my hand and asked, “What's wrong with focus groups?” A stunned silence followed, until the group recognized me as being from the hopelessly untrendy Midwest. The answer left me speechless (no small feat, by the way): “Consumers lie in focus groups.” This gross overstatement brought to mind a rather ugly possibility: consumers might not be 100 percent truthful, regardless of the methodology.

Why do consumers lie? Some blamed the “artificial” environment of a conference table and chairs in a sterile room at some agency in Anytown, U.S.A. After all, what motivation would respondents have for telling the truth to eight or nine perfect strangers?

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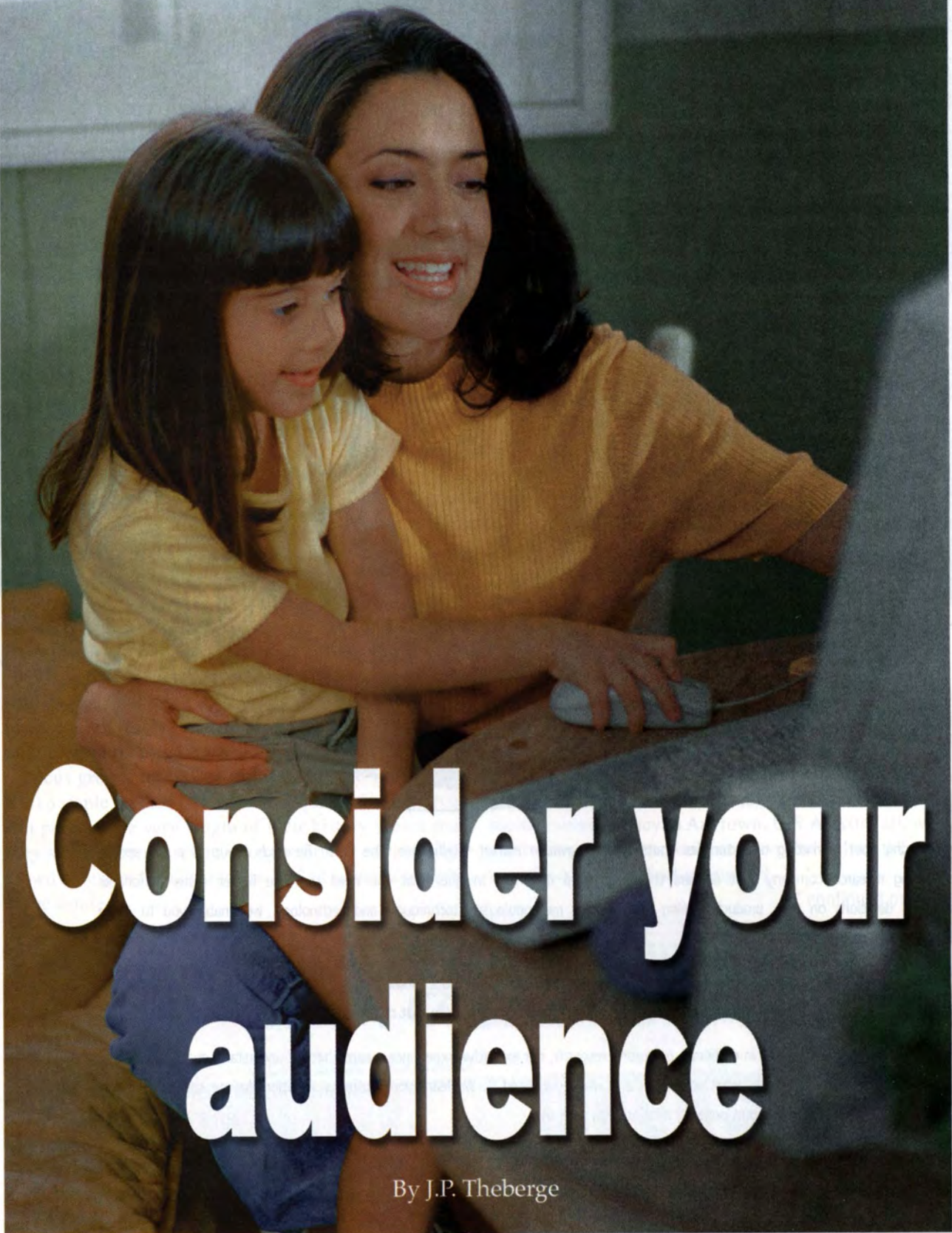
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Consider your audience

By J.P. Theberge

Research for Mexican e-com site shows impact of cultural factors

Editor's note: J.P. Theberge is manager, corporate development and client services/Latin America, TNS Market Development, a San Diego research firm. He can be reached at jp.theberge@mktdev.tnsfres.com or at 619-232-5628 x122.

While Internet mania may be cooling off in the general market, there are subsegments of the population that are still in the early phases of growth and can be marketed to as they begin their infatuation with the Web.

The U.S. Hispanic market is one such subsegment, and possibly the most significant. Thirty-two million strong, Hispanic consumers are going online much faster than marketers ever realized. Depending on who you ask, somewhere between 25 to 30 percent of Hispanics can be classified as Internet users. Because Hispanics are on average 10 years younger (27) than the general population (according to the U.S. Census Bureau), most are still in the early phases of their income earning cycle.

Take a young population with increasing social mobility and a thirst for information, add in the declining cost of computers and access to a worldwide treasure trove of information, and you have the opportunity to establish and grow a marketing relationship with an relatively ignored and brand-loyal consumer.

Culturally relevant

Internet companies, both pure plays and the brick-and-mortars, are beginning to see the importance of the Hispanic consumer and are starting to see that this market needs to be strategically reached in a culturally relevant way.

One company that decided to involve the consumer early on in the process was DeCompras.com, a Monterrey, Mexico-based Web site which provides Mexican expatriates in the U.S. a way to send gifts and other items via the Internet to their families still living in Mexico. Like other e-commerce sites, DeCompras.com allows users to browse through an online catalog of products ranging from electronics to kitchen appliances and have them shipped free of charge to any destination in Mexico.

DeCompras' General Manager Fernando López Castro had noticed in the back-end Web site logs that the site was getting many active visitors who seemed to spend a lot of

time on the site browsing through the different SKUs and adding various items to their online shopping cart. But the conversion to a purchase was lower than expected. This perplexed him and members of his staff, and prompted them to turn to TNS Market Development to investigate the situation.

Our firm implemented a qualitative usability and navigability study to track users' progress through the site to determine which part of the process was turning away interested customers. A series of interviews was conducted in which a bilingual moderator accompanied individuals during their online search for a product. Through specialized software, Internet and video technology, clients were able to observe the physical, non-verbal cues of the respondent as they navigated the site and also to see exactly what was happening on-screen, all from a remote location.

Traditional focus groups were conducted as well, to allow for more spontaneous feedback from consumers. The sessions included exposure to the Web site and thorough probing on layout, design, and navigability. Respondents were selected to be representative of Spanish-dominant Hispanic Internet users of Mexican origin (i.e., a range of experience levels, leaning towards less experienced).

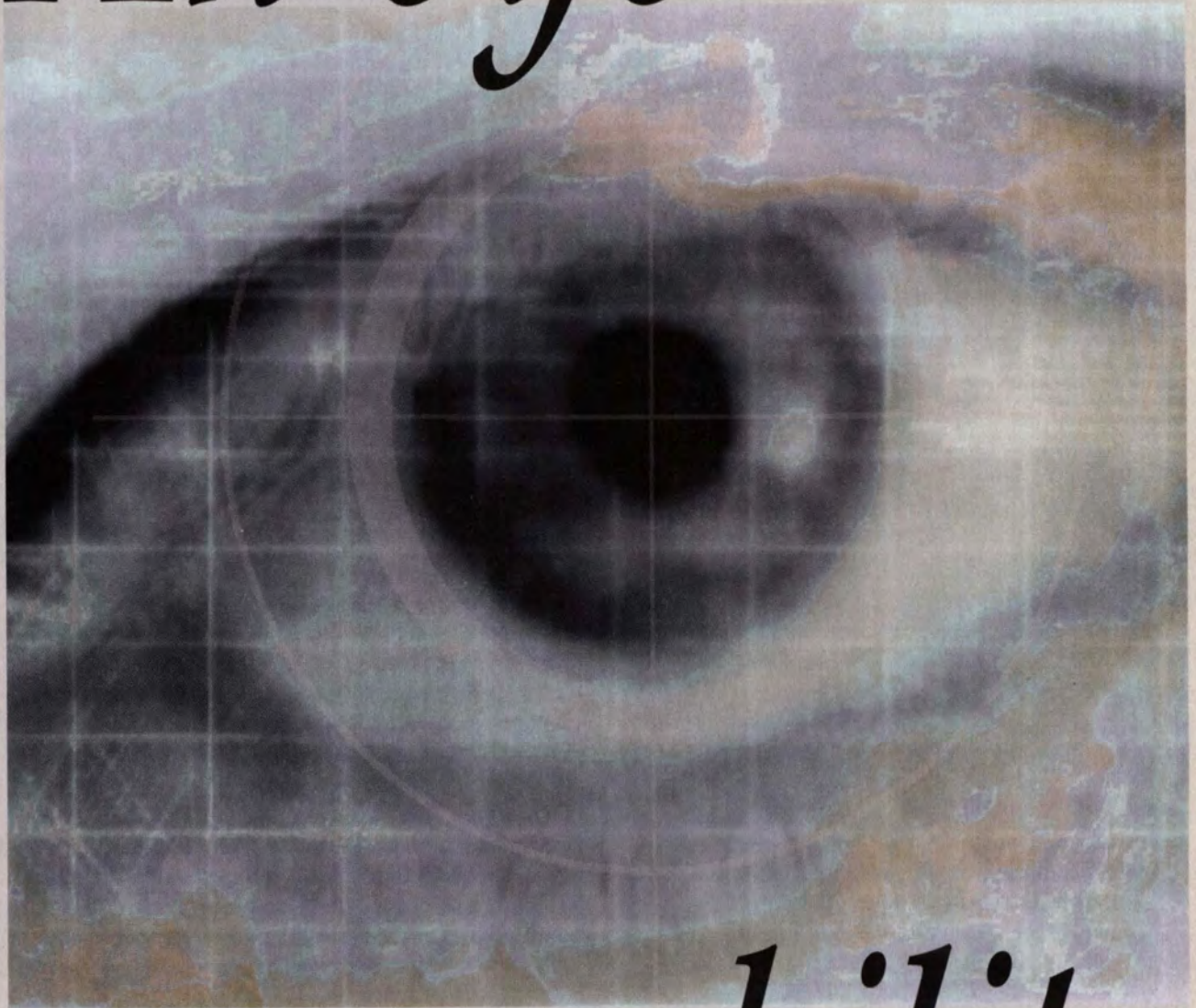
After a short session of exploratory probing on Internet usage and sending gifts to family in Mexico (to aid in the development of communication goals), respondents were given a brief non-specific description of the site (i.e. "DeCompras.com allows you to purchase items online for family or friends in Mexico") and were asked to pick out and actually purchase an item for someone in Mexico. After some observation, the moderator probed respondents specifically on why they made certain navigational choices as they browsed the site.

Expose weaknesses

With the usability interviews our firm was able to expose weaknesses in the interface design that assumed a great deal regarding Hispanic Internet users' habits. Not unlike other marketers, DeCompras was so deeply immersed in the details of its business and making the site work that it was easy to lose sight of the way consumers actually navigate a site. Generally speaking, the site assumed users were more advanced in their use of the online medium (which,

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An eye



on usability

By Sandra Marshall, Tim Drapeau and Maritza DiSciullo

Eye-tracking helps fine tune AT&T's customer service site

Editor's note: Sandra Marshall is president and CEO, and Tim Drapeau is vice president of sales and business development, at EyeTracking, Inc., a San Diego research firm. They can be reached at 619-594-0370 or at smarshall@eyetracking.com or td@eyetracking.com. Maritza DiSciullo is director of market intelligence at AT&T Broadband. She can be reached at 303-858-3418 or at maritzadi@att.com. This paper was first presented at the 2000 ARF Week of Workshops.

This article tells the story of an integration of qualitative and quantitative approaches to Web site usability. Working collaboratively, usability specialists from San Diego-based EyeTracking, Inc. (ETI) and AT&T investigated how two groups of users interacted with AT&T's Customer Service Home Page.

The quantitative approach described here comes from an eye-tracking methodology developed by EyeTracking, Inc. ETI records eye movements in two ways: 1) a video that shows the point-of-gaze superimposed on the display seen by the user and 2) the precise record of horizontal and vertical pixel coordinates on the screen. The latter are recorded at 250Hz, yielding 15,000 observations per minute for each eye. ETI's approach comes from the analytic techniques that synthesize this large body of data into revealing aspects of a user's performance as he or she traverses a Web site.

The article is organized in three parts. The first part provides details of the study. The second part summarizes the results from the two approaches, both separately and in combination. Finally, the third part discusses the value added by this integrated approach.

The Web site usability study

In a one-day study, ETI tracked the gaze of 12 participants who interacted with the AT&T Customer Service Home Page. Two groups of users were recruited: those who were already users of the online customer service and those who were AT&T customers but were yet not online users. The project was carried out in the usability lab at EyeTracking, Inc. Subjects were recruited and screened by an outside recruiting firm using customer information provided by AT&T.

Each user responded to a set of 13 tasks. Nine of the tasks were common to both groups of participants, and four tasks were unique to each group. Most of the tasks required a user to make a menu selection from the AT&T Customer Service Home Page and then to follow appropriate links to complete the task. All subjects completed the

study in approximately one hour.

Technical details

The eyes of each participant were tracked for about 30 minutes. During this time, he or she wore the eye tracker shown in Figure 1 while interacting with the AT&T Web site displayed on a 17" monitor in 800x600 resolution through the Internet Explorer browser. The user was free to use the mouse



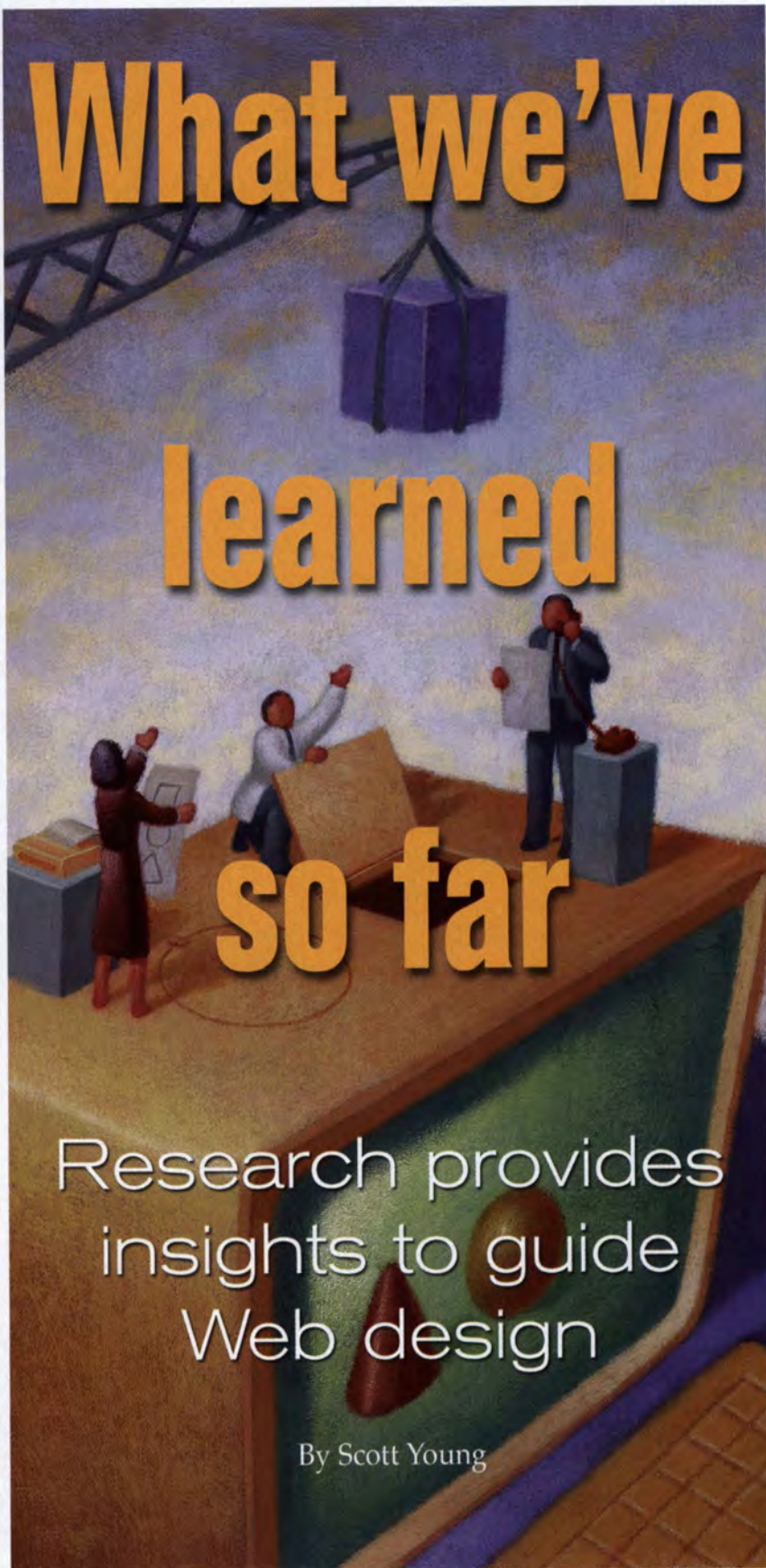
Figure 1 — an example of the eye-tracking equipment used to test the AT&T site.

and type in normal fashion.

Project objectives

Prior to a redesign of its site, AT&T

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Editor's note: Scott Young is president of Perception Research Services, Fort Lee, N.J. He can be reached at syoung@prsresearch.com or at 201-346-1600.

Over the past five years, my company has been fortunate to work with many marketers and design professionals as they implement their Web marketing strategies. In some cases, we've used traditional methodologies (such as focus groups, surveys and in-depth personal interviews) to better understand visitors' needs and expectations from Web sites. On other studies, we've used relatively new approaches (such as usability testing, eye-tracking of screen viewing patterns, and Web-based interviewing) to document and measure visitors' satisfaction with their Web experiences.

On one level, our experience has certainly confirmed that all of us (marketers, designers and researchers) have a lot more to learn about creating excellent Web experiences for our customers/visitors. However, our research studies have revealed several fundamental insights that appear applicable to most, if not all, Web marketing and design efforts. In this article, I'll share several of these insights and suggest their potential implications for effective Web design.

Starting at the home page

As you might expect, a good deal of our research has focused on home page content and design. In fact, as an adjunct to "traditional" usability testing, we've used a new version of our PRS Eye-Tracking technology to document viewing patterns and to uncover exactly what people see (and ignore) as they visit home pages.

The most important learning we've found is intuitive, but often ignored by Web marketers: People nearly always visit Web sites for a specific purpose. They are not inclined to

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browse until after they have completed their intended task (checking a stock quote, finding a product, getting a recipe, etc.). Therefore, efforts to market to people on the home page (via links and banners) are likely to be ignored. In fact, we've seen that most visitors spend under 10 seconds viewing home pages, typically starting in the middle of the screen (with the dominant graphic or visual element) and working their way left towards the search engine and/or navigation bar. Unfortunately, the overwhelming majority of visitors never return to the home screen, once they have left it to complete their intended task.

This finding draws into question the design strategy of most Web marketers, which is to cram as many links/messages as possible onto the home page, since this screen typically receives the most visits. When you consider the sheer number of elements on most home screens — and the limited time that people spend there — it is obvious that most links are never seen/considered. Our research suggests that Web marketers and developers would be best served by:

- *Clearly emphasizing three to five links on the home page*

People typically will not take the time to read through a laundry list of 10-12 different site features. A cluttered screen is likely to discourage involvement and hinder usability. On a home page (as on package labels and print ads), less is more in terms of engaging visitors and getting your key messages across.

- *Using visual icons to draw attention to these primary links*

In our studies, we've repeatedly found that links with accompanying visuals (such as logos/icons) are far more likely to be considered than those without a visual treatment. Predictably, however, if each link on the screen is treated this way, the effect/impact is lost.

- *Positioning key messages above the fold, but below the top banner*

Our research confirmed the well-publicized fact that many people never scroll down below the initial screen viewing area. However, we've also found that many people have

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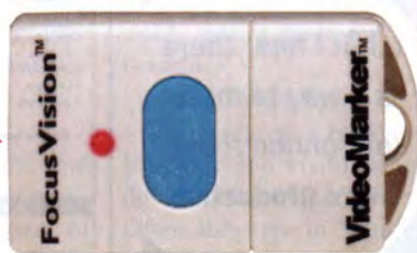
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trained themselves to ignore the top banner of Web screens, on the assumption that it will contain advertising. In most cases, people begin their viewing below this top banner (in the content area) and never bother to move upward.

• *Positioning the navigation bar on the left side*

Our studies suggest that the left-

The current IBM home page (Figure 1) applies many of these design principles, most notably its relative simplicity and use of a dominant visual to lead people to three to five key links. A more typical home page, such as that of Compaq (Figure 2), fails to set clear priorities and requires involvement far beyond the willingness of most visitors.

The moment of opportunity

In our studies, we've repeatedly seen that the moment of opportunity comes immediately after the person has satisfied his/her primary reason for visiting. At that moment, once the visitor has collected a recipe, placed a trade, or gathered product information, he can decide to leave or take a few minutes to explore other features of the site. Assuming that the site has served his objective, it's also likely that he is somewhat favor-



Figure 1 — IBM home page

This IBM home page is notable in its relative simplicity and its use of a dominant visual to lead people to three to five key links.

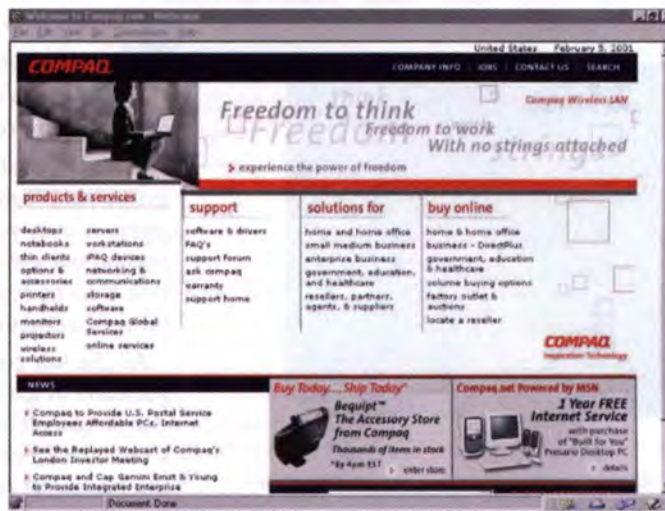


Figure 2 — Compaq home page

A more "typical" home page, such as that of Compaq, fails to set visual priorities and thus sacrifices communication and usability.

column navigation bar has become the standard with which most visitors are most familiar and comfortable. It is where people now naturally gravitate, rather than the top banner. Interestingly, this gravitation to the left has made visitors prone to ignoring the items in the far right-hand column of the screen.

ably disposed towards the site or company. Unfortunately, it is at this point — occasionally referred to as the seductive moment — that most Web sites fail to seduce. Rather than communicating a compelling reason to stay, many sites leave visitors with only a navigation bar and/or a text link back to the home page. By failing

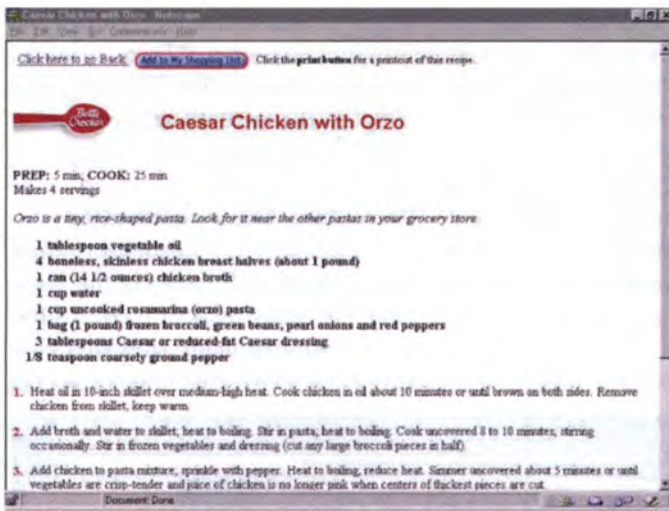


Figure 3 — a recipe at BettyCrocker.com

For many sites, the “moment of opportunity” comes immediately after the person has satisfied his/her primary reason for visiting. By failing to send a call to action on this screen, Betty Crocker has missed an excellent opportunity to move visitors beyond short, single-function visits

to send a call to action (“Did You Know That We Also Offer...”), Betty Crocker (Figure 3) has thrown away an excellent opportunity to make its site “stickier” and move visitors beyond short, single-function visits.

be a bit less intuitive:

- *Link descriptions*

In our studies, we’ve found that unclear or misleading link descriptions are a very consistent source of navigational problems and/or unmet expectations. Several factors appear to

Improving usability

Every Web researcher has his or her Top 10 list of common usability problems, and I’m no exception. However, I’ll avoid dwelling on the very obvious (such as long download times and browser incompatibility) and point out three issues that may

drive this problem, most notably the mismatch between marketer language and customer language. However, Web designers sometimes compound this problem by pushing for short (one- to two-word) descriptions or trying to be too cute/clever (i.e., “Turbo News”). In our experience, we’ve found that a variation of Murphy’s Law is in effect: Any link that can be misinterpreted will be misinterpreted, resulting in a confused, frustrated, or disappointed visitor. Using rollovers to provide more detail is valuable, but not a perfect solution, since we’ve seen that many people never bother to explore a link that does not immediately convey a clear message. Better to spend a few more words getting the terminology exactly right.

- *Search engines*

The disconnect between marketer language and visitor language also dooms many visitors’ search efforts. Often, they type in “their” term, only to find no matches, because the company calls the same product some-

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thing else. Typos and misspellings also sabotage many searches, which is why some sites have wisely moved to a search-by-letter approach (e.g., Type in "A" and see all the options starting with "A"). While offering a search engine is a must, we feel that the best way to enhance usability is to focus on minimizing search engine use via effective site navigation and design.

• *Sorting processes*

Sites offering thousands of products or services face a difficult challenge in helping people sort and consider different options. Here, we've also found that less is more: Trying to match people to the ideal product in one step rarely works, because it requires the person to enter too much information.

Asking a person to enter seven pieces of information gives him or her seven opportunities to make a mistake, which often results in zero matches. A better strategy is to tackle the issue in two steps: First, ask for two or three critical pieces of information (desired destination, desired activities, etc.) and provide a broad range of matches (i.e., 100 trips that match those basic criteria). Then, allow people to quickly sort those options by several key dimensions (i.e., by price, by

length of vacation, etc.). Figures 4 and 5 illustrate the "Trip Finder" process on the Web site Gorptravel.com, both before and after usability research.

Promoting visitor registration

Acquiring registered users (and their e-mail addresses) is the Holy Grail for many marketing Web sites, but we've seen many sites that do a very poor job of encouraging people



Figures 4 and 5 — the "Trip Finder" feature at Gorptravel.com (before and after) Asking visitors to enter too much information often leads to mistakes. Usability research led Gorptravel.com to tackle the issue in two steps, by simplifying the initial query, insuring many matching trips and allowing people to sort options by several key dimensions.

to register. Specifically, they fail to:

- *Communicate a compelling reason to register*

Keep in mind that "You will not have to provide this information again" is not an end-benefit for a visitor. Coupons, savings and advance notification on new products are com-

elling benefits and reasons for registering. In our experience, we've found that news (via e-mail) can also be compelling, but only if it is tied specifically to the person's interest area. For example, an e-mail regarding the latest news in arthritis treatment will obviously be meaningful/valuable to someone who has indicated that he has this condition. An e-mail with the day's general health headlines (which forces the person to scan through to find relevant articles) is usually not worth sending.

• *Provide reassurances about the use of personal information*

Obviously, people need to know that their e-mail addresses will not be sold and that they will not be bombarded with sales calls. However, it is best to keep these reassurances short and simple. Interestingly, we've consistently found that "shouting" security reassurances ("You're safe with us") tends to raise more concerns than it solves.

• *Ask for only the most relevant information*

The more information you request, the more likely a person is to refuse to register. Most marketers only need two or three pieces of information (name, e-mail address and area of interest) to begin a meaningful dialogue with a potential customer (by sending a relevant e-mail), but they inevitably ask for 10-15 pieces of personal information and often don't allow people to skip certain questions and answer others. As a result, people simply decide not to register. From a design standpoint, it is important to keep these benefits and reassurances in view as the person provides the information, rather than just putting them on an introductory screen. It's also best to let people know exactly how many questions they will be asked (i.e., "question #2 of five questions"), so that they know the registration process will be relatively short. Figure 6 contains a registration screen that fails to provide visitors with the reassurance that they need.

Guiding content decisions

When it comes to site content, I'm

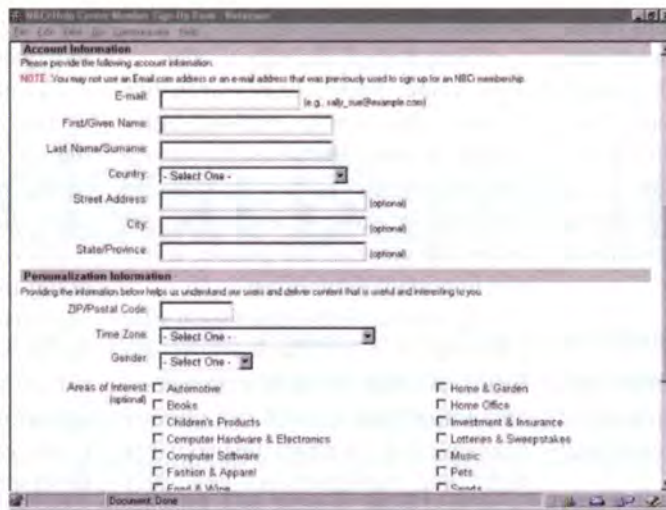


Figure 6 — registration screen

Many registration screens ask for too much personal information and fail to provide the reassurances that visitors need.

skeptical of broad generalizations regarding the value of different features and applications. However, we have learned one thing (about site content) with significant implications for Web design:

- For nearly every Web site, there are three or four main reasons why most people visit.

For example, on medical sites, we've seen that most people visit to educate themselves about an illness or a specific medication that their doctor has prescribed. On automotive Web sites, most people visit to find vehicle specifications (for a potential purchase) or to check maintenance and warranty information (for their current vehicle).

In terms of Web development and design, this fact suggests that if you focus on identifying,

highlighting and executing these key applications, you will consistently meet the needs of 80-90 percent of site visitors. Unfortunately, many companies are in such a hurry to launch (or re-launch) their sites that they don't take the time to speak with visitors and identify the most important site benefits. As a result, they

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assign equal importance (and visual prominence) to eight to 10 features and inevitably waste time and energy developing features that people don't want or never see. This failure to prioritize is nearly always reflected in busy home pages that sacrifice usability and fail to insure consideration of the most important links.

Understanding the visitor

The need to prioritize underlies perhaps the most important truth we've found regarding Web marketing and design:

The "rules" of communication that apply to packaging and print advertising are also in effect on the Web: Effective communication is about making choices, setting priorities and focusing on key messages.

To make intelligent decisions, Web marketers must start with an understanding of their visitors' expectations and objectives. With this in mind, I'd like to conclude by offering these two suggestions for using visitor research in the Web development and design

process:

- *Think beyond usability testing*

To some, Web site research has become synonymous with usability testing. While usability testing (observation of visitors as they navigate the site and use various features) is an important piece of the puzzle, it has two important limitations:

— It only provides information after a Web site is nearly finalized (in beta form). At this point, a tremendous amount of time/money has already been invested, timelines are inevitably tight, and marketers are generally unwilling to truly re-think their site. In short, they are approaching the research as a disaster check and looking for quick answers/adjustments, rather than ideas and insights.

— By its nature, usability testing focuses the visitor on the micro-level of site functionality (Does it work?), rather than the macro-level of the site's value to them (Is this feature worth using?). By showing a person a functional prototype, you are automatically narrowing his/her field of vision in

thinking about how a Web site can be of personal benefit.

Taken together, this means that usability research can often result in the refinement of features/functions that are not valued by customers (Bad ideas, well-executed.).

This is not an argument against doing usability testing, but rather an argument for involving the visitor earlier in the design process. In our experience, we have consistently found that upfront research (concept testing) nearly always pays for itself by focusing development efforts on the site's primary sources of value, and away from features that are unlikely to be used.

- *Build research into project planning*


If research is not incorporated into timelines from the beginning, it is likely to end up rushed (and compromised) at the end of a project. Ideally, we recommend speaking with visitors at three points in the Web development process:

1) concept testing early in the development process, to challenge/confirm assumptions and guide decisions regarding content and design (overall look/feel and organization);

2) usability testing at the working prototype (beta) stage, to confirm functionality and guide refinements prior to going live;

3) site-based surveys after the new (or re-launched) site has been introduced, to measure visitor satisfaction, to document the site's impact on visitors' attitudes/behavior and to guide further site refinements.

Too late

Following this process will insure that Web designers hear from end-users as key decisions are being made, before it is too late to change direction. And, it will document the value of effective Web design in terms of satisfying and influencing site visitors, rather than often-misleading measures of site traffic. In short, designers who involve the visitor throughout Web development are likely to be rewarded with a streamlined process, a more effective final product, and more compelling evidence of the impact/effectiveness of their work. 

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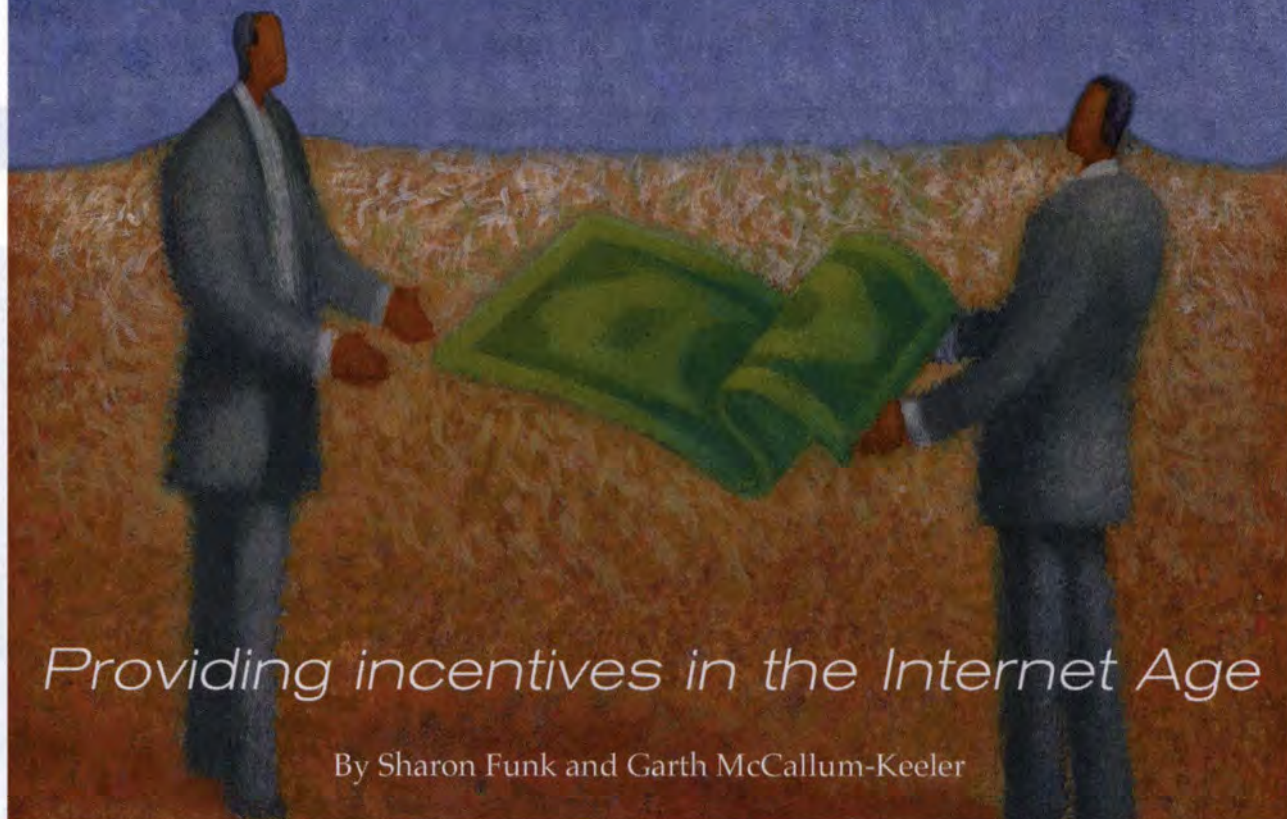
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When money doesn't talk



Providing incentives in the Internet Age

By Sharon Funk and Garth McCallum-Keeler

Editor's note: Sharon Funk and Garth McCallum-Keeler are associates at Applied Marketing Science, a Waltham, Mass., research firm. They can be reached at sfunk@ams-inc.com or at gmcclalum@ams-inc.com.

The advent of online research has brought increasing debate about appropriate incentive strategies and amounts for research participants. At a recent conference on online research, attendees asked:

- Is it possible to reduce incentives for participation in online research, since the respondent incurs no expenses in getting to a field site (e.g.,

drive time, mileage, gasoline, etc.)?

- Is it possible to reduce incentives for participation in online research, since respondents can complete the exercise from the comfort of their own home, at their own pace, and according to their own timeline?

The answer to both of these questions is: yes. In fact, you may not have to pay at all! Response rates are not always contingent upon the cash incentives given to respondents. While cash is often still appropriate and necessary, depending on the target population and the purpose of the research, you may achieve greater cooperation with other types of incentives, or by complementing monetary

incentives with other incentive types. Certainly, money continues to be a strong motivator. But in an Internet Age, it is important to think more broadly about effective incentive methods — not only may traditional monetary incentives become an expensive proposition, they may not even be enough!

Because of the speed, potential number of respondents, and convenience of the Internet, it has become easier to conduct many types of research and more and more people are being asked to participate in studies. This results in over-researched populations, making every individual within that population more difficult

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to recruit (a trend seen in all modes of research). Now, more than ever, researchers must consider who their target populations are and what their specific wants and needs are, so that they can offer incentives that truly persuade.

Considering the various populations one might reach, we sketched a typology of incentives that work well in gaining the highest levels of participation.



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Material incentives

The first type of incentive, material incentives, include what we traditionally think of as incentives: money and gifts. The amount of money and the value of the gift can vary greatly, anywhere from a couple of dollars or a set of movie tickets, to a large cash prize or a Palm Pilot. Sometimes respondents are offered a choice from a specified gift list or catalog. Regardless of its value, the material incentive comes in two forms: guaranteed or lottery. With the guaranteed material incentive, the respondent knows that upon completion of the research task, s/he will automatically receive a gift. The lottery material incentive only qualifies the respondent for a chance to win a prize upon completing the research task.

Material incentives appeal to most populations. However, over time, their value and, subsequently, their powers of persuasion, diminish. For example, if you are trying to build and maintain a panel of Internet respondents, a material incentive might not be sufficient to persuade people to continue to participate over time. There is evidence that this is particularly true with lotteries. Over time, these lottery incentives are less and less effective since people are bound to become frustrated if they have participated in 10 surveys and have received nothing. Even with guaranteed gifts, unless a large sum of money is involved, a few dollars is not likely to convince respondents to continue to donate their time to successive research tasks. Similarly, these material incentives are also inadequate for affluent populations, which are less likely to be enticed by a relatively small sum of money or gift.

Altruistic incentives

A second incentive type is an altruistic incentive — this is an incentive that persuades people to participate in research because doing so conveys (both to themselves and to others) that they are performing a good deed. Whether they perform the research task because they are truly altruistic or because it makes them feel altruistic is irrelevant; the outcome is the same.

The true motivation is probably a combination of the two — it is the nice thing to do and it makes them feel good about themselves.

As with the material incentive, the altruistic incentive often involves cash, but the money goes to a charitable organization instead of directly to the respondent. When this type of incentive is used, it is a good idea to make the donation in the name of the respondent. The organization will typically send a letter of thanks to the respondent directly, giving the respondent the satisfaction of having done a good deed (of feeling altruistic), not only through the research itself and recognition by the market research firm but also through the direct acknowledgment and appreciation of the charitable organization.

The altruistic incentive is most effective with working professionals, high-level B2B recruits, and older populations. This incentive helps elicit participation from people who might not otherwise participate — those who are not motivated by cash incentives, or who are both weary and wary of market research. It is also a good alternative for populations that feel it is improper to personally accept money or gifts in exchange for participation (e.g., those working for the government, those who do the research on their company's time).

A very busy professional who earns a significant salary and contributes personally to charities may not be enticed with a traditional material or altruistic incentive. Certainly one approach is to increase the incentive amount (material or altruistic) to a threshold that few would refuse. However, this is likely to be an expensive proposition, and there are other methods of persuasion that go beyond money, which will likely be more practical and just as successful.

Didactic incentives

Sometimes, sharing top-line information gleaned from a study is the most enticing incentive for participants, particularly in B2B studies. The didactic incentive provides respondents with something that benefits them — information and knowledge,

things especially valued among certain populations. The didactic incentive is rarely on its own a sufficient motivator, but it provides legitimacy and serves to distinguish your study from others. A physician, for example, who might not ordinarily participate in a study (because of lack of time and no real need for a few extra dollars) may be more inclined to participate when told that, along with a cash incentive, s/he will also be provided with a report summarizing the central findings of the study and how other physicians responded to the same questions. This report is attractive in that it offers insights into what other physicians are doing, information on the future prospects of some new technology, or information that might help the physician treat patients and keep her/him current on new findings and new information in the field.

Likewise, managers in companies are often forbidden from or feel uncomfortable accepting money for participating in studies. However, receiving a report that outlines how other managers in their own industry are dealing with a certain issue or how they view the "state of the world" is quite enticing. They can then justify their participation and the time it will require since they will not only be doing a good deed (charitable donation), but they will also receive tangible, meaningful results (i.e., competitive intelligence, benchmarking data) that will assist them in their job. Of course, it is necessary to gain the client's approval prior to offering such information. However, we have found that a short, one- or two-page report that identifies the purpose of the study and includes a few bullet points outlining interesting information relevant to the population will suffice, and need not reveal any proprietary data.

Integrative incentives

Finally, the integrative incentive is one that helps to promote a sense of community — as such, it creates feelings of obligation and commitment that can be very effective in motivating people to participate, or, for panel members, to continue to participate. This strategy can be used when study-

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ing both homogeneous and heterogeneous populations, although different strategies should be employed. When a homogeneous population is being studied, a common thread that connects the pool of respondents already exists, for example, they are all nurses, they are all contractors, they are all SUV owners, they all suffer from the same illness. In each scenario, a somewhat unique attribute common among them is leveraged to encourage participation. The study may be introduced as one that will ultimately benefit all nurses/that will help to better define the needs of contractors/that will lead to a better SUV/that will help to find a cure for a specific disease. The respondent is often motivated to participate in a forum for people in the same profession/situation because it "helps others who are similar to me in some way."

Very often, however, the group may be a heterogeneous population with no common interest or occupation, or whose commonality is too broad to support the notion of a community.

For example, an omnibus household survey about consumer products must likely use other integrative strategies to compensate for the lack of a unifying thread connecting respondents. Many research companies have been incredibly successful in building and maintaining the membership base of their panels simply by sending out periodic newsletters, which report topline findings from surveys that members participated in and which spotlight a "member of the month." These strategies create and reinforce the notion of a virtual community, all working together to help companies shape their products and services. A commonality is created around the fact that all members are participating in surveys — the community is the "surveyed." Also, many established consumer goods companies have in-house research teams that have developed their own panels for their exclusive use. At a recent conference, a representative from a large consumer packaged goods company spoke about the success they were having

with their customer advisory panel. Panel members participate, he stated, because they feel they have a relationship with the company and they are part of a special group. The need for incentives among this group is rare, since members are enthusiastic about helping a well-known company develop new products.

Strategies to augment the newsletters described above include personalized letters, professional-looking materials, and responsiveness to member queries. All of these actions help to convey to panelists that they are valued members of the community, and that the research organization or company is willing to expend real effort to maintain the relationship.

The various types of incentives outlined above should serve as a conceptual framework for researchers thinking about how to package the things that will get the greatest response, most efficiently, and for the least amount of money. One type of incentive, two types, or more, may

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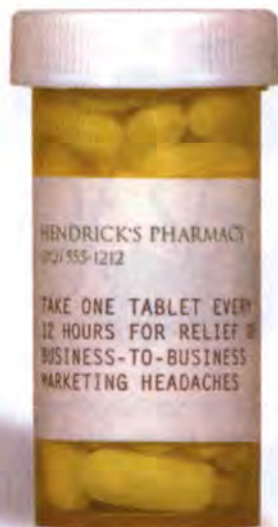
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be the best tactic for a project, depending on who is being studied. Combining a nominal monetary or an altruistic incentive with a didactic incentive may work well for one study, while an integrative incentive in combination with an altruistic incentive may work equally well for another.

Some examples

We recently conducted a study in which we were attempting to recruit 40 energy managers at large commercial and industrial companies to participate in 30-minute open-ended telephone interviews. Because of the restructuring of the electric industry, these high-level respondents were being called to participate in research on a regular basis, and were highly over-researched. We were successful in reaching them by packaging multiple incentive types — a generous monetary incentive for either themselves, their company, or the charity of their choice, coupled with an executive summary of the study results. The study results proved to be a powerful motivator. Due to extreme uncertainty in the industry, respondents were very interested in learning the responses of their peers.

In another setting, a national research organization has sustained an enormous Internet panel of consumers (heterogeneous group) by creatively combining an integrative incentive with a form of altruistic incentive. By providing members with quarterly newsletters and periodically giving them the opportunity to vote on which charities the organization will contribute to, the organization has created a panel of over half a million respondents — all with no monetary compensation to the respondent! The success of non-monetary incentives in this example is a striking counterpoint to the questions we heard posed by researchers at the aforementioned research conference. The next time someone asks you, "Is it possible to reduce incentives for online research?", your answer should be, "You may not have to pay at all!" 



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Online focus group FAQs

You've got questions,
we've got answers

By Monica Zinchiak



Editor's note: Monica Zinchiak is owner of Z. Research Services, San Diego. She can be reached at 619-223-4107 or at ZRSch@cts.com. Much of the following information has been generated from a collaborative effort by the members of the QRCA Online Qualitative Research Task Force (Phase II). Members include Kalpana Biswas, Mary Cowden, Lina Di Blasio, Brenda Johnson, Lisa Kindig, Abby Leafe, Casey Sweet, David Van Nuyss, Jeff Walkowski, Foster Winter, and Monica Zinchiak. The perspectives offered reflect those of the author.

As techniques and technology have advanced, the acceptance of online focus groups by qualitative researchers has grown. What began as modified chat rooms have morphed into sophisticated online research environments. Online moderators have developed distinctive styles that they

feel produce meaningful results. Professional organizations have sprung up to address the needs of researchers using the online medium.

All of this has led to more questions than ever regarding how to successfully execute an online focus group project. Following is a list of frequently asked questions collected from both experienced and inexperienced online moderators, clients using their services, and vendors that support online focus groups.

Application issues

Q: *Can online focus groups be used as a substitute for face-to-face groups?*

A moderator must evaluate the objectives of the study and each available methodology to determine whether online focus groups will be appropriate. Online focus groups are another tool available to moderators, not an equivalent replacement, just as

telephone focus groups are not a replacement for face-to-face groups.

Q: *What kinds of topics or respondents are best suited for online qualitative research?*

Online qualitative research is especially good for (but not limited to) some of the following situations:

- studies with low-incidence respondents where face-to-face groups are not feasible;
- studies where respondents are widely dispersed, including those in rural areas;
- studies on sensitive topics, where anonymity is desired;
- Web site evaluation or feedback sessions or other topics related to the Internet or computer technology;
- B2B professionals with limited time.

Q: *When is it appropriate to use the online focus group method?*

The general belief among well-sea-



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soned online qualitative researchers is that in some topic areas (high-tech, Internet usage/Web site evaluation, or highly personal/sensitive topics) online focus groups can perform as well as or better than traditional groups. Bulletin-board focus groups (BBFGs) may be the best example of this, as respondents can respond at their leisure and take more time to compose their answers — often generating lengthy transcripts. Probing by a moderator can also be longer and more in-depth.

Situations where online focus groups may not be the best application are:

- when capturing body language or facial expressions is vital;
- when you need to show prototypes or 3D models;
- when products need to be handled, when hands-on usage is critical or touch/feel experience is mandatory;
- if conducting taste-testing, commercial testing, or testing ads with heavy copy;
- if client material or the topic is highly confidential.

Recruitment and respondents

Q: How do I recruit for online focus groups?

Recruitment method principles are the same as recruiting for traditional focus groups — contact the correct individual, screen for qualifications, invite, and confirm attendance before the group. The main differences will be how the respondent is contacted.

1) Convenient and popular are e-mail invitations and/or screening. While this may seem to be an efficient and appropriate method there are issues to be aware of.

- You must know with certainty that the potential respondent has given permission to be contacted via e-mail (opt-in lists).

- Many people do not check their e-mail every day and you may lose valuable recruitment time.

- Without clear identification or familiarity with the sender's name, people will not always open unsolicited e-mails.

- E-mail addresses change often and people do not take the time to update everyone.

2) Telephone recruitment, identical

to traditional recruitment, is usually reliable. Be aware of the sophistication of the respondent base. It is advisable to make some e-mail contact with them prior to the group. E-mail addresses need to be recorded correctly and confirmed as this will be often used to send the URL, instructions, and individual passwords.

3) A combination of both e-mail and telephone works well. Confirmation phone calls used with e-mail contact will elicit a real commitment from the respondent that otherwise may be lost via e-mail confirmation.

Q: Which companies recruit for online focus groups?

Many of the online focus group rental facilities have panels they maintain for recruitment. These panels vary in their scope and reliability. Be sure to ask how panel participants were collected to assess your comfort with their database. There are very few services that cater strictly to online market research recruitment. Some of the online recruiting services are new to recruiting so it is important to ask them to describe their recruitment steps, review their correspondence with respondents, and establish the timelines they will adhere to.

A few of the bonus-point vendors, such as My Points or Flooz, have programs that you can utilize to recruit respondents. Keep in mind that these vendors generally are looking for large participant commitment and the cost to the project can be high. The trade-off here is that their databases are enormous and the participants are cooperative.

Lastly, your most trusted database may come directly from your client. Client resources are typically reliable and also cost-efficient. However, if you are using a client's database make certain the people have given their permission to be contacted via e-mail. You can increase the effectiveness of this method (response rate) if the originating correspondence comes directly from your client.

Q: What show rate can I expect with online focus groups?

The show rate is highly dependent on the type of respondents being recruited and the recruitment method

employed. For typical consumer groups, recruited solely online and confirmed online, show rates are generally lower than face-to-face groups; for eight participants, it is recommended that at least 16 be recruited. Response rates tend to be higher when recruiting is done via telephone or at least confirmed via telephone with comparable over-recruitment. Problems with respondents' ISPs and/or traffic on the Internet can also affect your show rate.

Q: What are the issues to keep in mind when screening for online projects?

If you are using a Web-based screener you will want to keep in mind how the question will be read or interpreted. Some moderators feel it is possible to have more extensive screening questions using a Web-based screener because they feel respondents can answer at their leisure. Other researchers disagree and prefer to keep Web-based screening simple and to-the-point. You may want to ask at least one open-ended screening question to give you a feel for how well the respondents express themselves online. Telephone recruitment follows the same guidelines as with traditional groups.

Q: How representative is the online population?

Some would argue that the online user is more affluent than the average consumer, but every day the online population grows and becomes increasingly more reflective of the general population. According to an August 2000 study by the U.S. Department of Commerce, approximately 42 percent of homes are presently connected to the Internet. Online focus group topics tend to be better directed towards users of the Internet or projects that surround Internet issues. A possible advantage to using the online population is the ability to reach lower-incidence respondents more efficiently.

Q: What are appropriate incentives for an online focus group?

Incentives tend to be in line with traditional focus group incentives. At this time, \$40 seems appropriate for a typical consumer real-time group running

90 minutes. As with traditional groups, the lower the incidence generally the higher the incentive to motivate those individuals to commit. Similarly, B2B professionals will require a higher incentive.

BBFG incentive practices are not well defined yet. The incentive amount will greatly depend on the time commitment you ask from the respondent, and in some cases, the affinity they have for the topic. For example, doctors may have great interest in sharing with peers their experiences with a new pharmaceutical and may not require large incentives. Keep in mind there is a trade-off with BBFGs: Respondents can participate at their convenience but they are asked to dedicate a significant amount of time during the run of the study.

Q: What is the right size for an online focus group?

Just as with traditional focus groups, if you have too many respondents you sacrifice time and depth of research. In the end, your project will determine its own right size but generally eight respondents for a real-time group are easier for the moderator to manage, observers to follow, and participants to build a relationship. The size of the transcript generated must also be factored into your analysis time.

Larger groups are recruited for a BBFG because the attrition rate is high and respondents have more time to read and post. Again, the complexity of the discussion and the length of the board will determine the appropriate size. Some projects may require as many as 25 participants; a more common number is 15-20. Keep in mind, too many participants in BBFG can lead to a large number of postings and an increased likelihood that not every participant will take the time needed to read them all.

Q: Is there a certain type of individual that is best suited for online focus groups?

Individuals need not be articulate, but they do need to feel comfortable with the online environment and be able to express themselves using words. They should also have adequate keyboard skills. BBFGs work well for individuals who have less availability

for real-time groups, like B2B professionals. Real-time groups work well for consumers, but are not limited to only this type of online group. These are generalizations and the complexity of the subject and commitment level of the participants may determine which methodology will work best.

Q: How do I make sure the person sitting on the other end of the computer is who they say they are?

Telephone confirmation and re-screening help to some extent. If a

respondent does not seem to be qualified the moderator can send a private message to the respondent and ask them qualifying questions, and it is generally simple to remove them without being obvious to the others in the group. You may find it prudent not to send the URL or password to the respondent too early — no more than one to two days prior to the group, giving them less time to pass this information along.

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
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The mechanics of the online focus group process

Q: *How secure is the online environment?*

Most facilities have designed their software to provide password protection for participants and observers. Some facilities claim to have the ability to protect visual concepts through print-screen security measures. However, if stimuli (visual or descriptive) are highly confidential, you may not wish to incur the risk that such intellectual property might be compromised.

Q: *What kind of visual stimuli can be presented in online groups?*

Any image that can be transferred into a graphic file or Web page can be displayed during an online focus group. Online facilities that have this capability offer a couple of different options for presentation: a separated frame, known as a whiteboard (similar to Microsoft Netmeeting); or a new browser window that opens on the respondent's desktop. Active Web pages can be presented in the white-

board area and static images are most often required to take the .jpg format. Be aware that the whiteboard is not a full frame image and respondents may need to scroll up and down or side-ways to view the entire image.

Spawning a new browser window is a nice way to show true form Web pages, but there are concerns with this approach. One problem is that your respondents have now been taken away from the discussion. This browser page is live, and the moderator has no control over the respondent's actions when viewing. Some respondents may get distracted by this new window and may not return to the discussion in a timely manner. It can be difficult for the moderator to regain control of the discussion in this situation.

Q: *Can clients view or observe the group? To what extent can clients be involved with the moderator?*

In most virtual facilities, clients can view the groups without the participants being aware of their presence. In some facilities, clients can chat with

other clients, clients can chat with the moderator, and tech support people can communicate with the moderator, all without the respondents knowing. Beware: Clients can overuse this feature, taking too much of the moderator's attention away from the session. The moderator must establish protocols with the client regarding private messaging during the group.

Q: *How do you schedule groups to accommodate time zones?*

With real-time groups, evenings are still the most popular for consumer discussions, but depending on the targeted population, daytime groups can work. The timing of online B2B groups varies just as it does with traditional B2B groups. Timing doesn't have to be a huge hurdle if all your respondents are in close time zones (i.e., North America), but what happens with cross-continent participants? Whenever possible, it's best to group them within a few time zones of each other. In any case, make sure that your respondent knows the correct group start time in his/her area.

With BBFGs you do not always have to consider time zones as the respondent checks the bulletin board at his or her convenience. For close time zones, new topic threads are generally posted in the early morning to accommodate the early birds who log-on.

Moderation and analysis

Q: *What moderator skills will I have to call upon in an online focus group?*

The same skills are required from the moderator whether it be online or offline. Extra thought should be put into writing the discussion guide to eliminate misinterpretation of the questions. Probing questions should be phrased to welcome responses from all respondents. Clarification will be even more important in the text environment as you will not be able to use non-verbal clues to determine the meaning of the respondent's answer. You may find analysis more or less demanding depending on how much you rely on the transcripts. Familiarity with chat room culture/slang and competent typing skills are also helpful.

Q: *What projective techniques are possible in online focus groups?*

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Some projective exercises are easily adaptable to the online environment, while others are difficult to transfer. Obviously, the successful techniques are those which are mostly verbal — “What kind of animal does this brand bring to mind?” — something respondents can think about and then put into words. Unique projective techniques are likely to be developed as this methodology matures.

Q: How is the moderator's guide handled in online focus groups?

Careful thought must be given to how the question is composed and the language in which it is written. How the respondent interprets the question, particularly when the discussion pursues a path not anticipated, should be thought out and tested. Many online focus group facilities allow you to preload your discussion guide, eliminating the need to cut and paste questions during the real-time discussion. With these preloaded questions editing is possible, but this takes your attention away from the respondent's answers.

BBFG discussion guides can also be preloaded (even automatically posted by the server without you manually entering questions) with editing being seamless because the group is not running in real time. This gives the moderator much more editing flexibility and accuracy. In addition, the client can be consulted about the path of the discussion to address issues that arise, making it possible to re-develop the discussion guide on the fly.

Q: Are individuals more or less candid because of online anonymity?

Most researchers who have used online groups agree that online respondents tend to be more candid and direct. Generally, respondents compose their answers before reading others' postings. Therefore they express only their opinions, not a reflection of the peer pressure sometimes experienced in traditional groups. Respondents also seem to express their opinions without the tempering sometimes seen in traditional groups. For example, respondents feel more comfortable giving you negative or controversial feedback (“This ad sucks!”) if they are not sitting at a table where people might verbally challenge them.

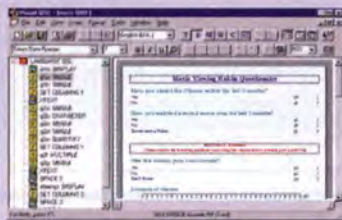
Q: Do dominators exist online as with in-person groups? What techniques can be utilized to control respondents?

It is difficult for a person to dominate an online focus group due to the text environment; everyone is an equal with no body language, facial expressions or perceived social status. A real-time group may contain someone who types a longer response, but since responses are generally posted in groupings there is no sense of dominance by one

respondent. In addition, most respondents type their replies before reading the postings of others and therefore are not influenced by their fellow participants. However, it is not impossible for a dominant respondent to surface online. Some of the online facilities have blocking and private messaging features that will help you deal with the problem respondent without alerting the other participants.

Q: Do you wait until all respondents answer one question before moving to

On-Line Surveys: Step - By - Step



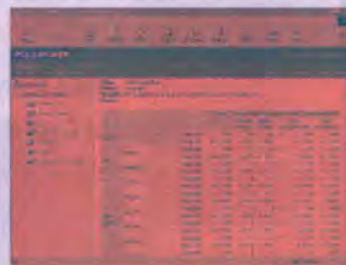
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the next?

Respondent typing skills, server refresh rates, and Internet lag time are some of the factors that delay by a few seconds the posting of responses. Give the respondents time to read the other postings and the moderator to probe before moving on to the next question. The group will move smoothly despite the lag time. You will develop a rhythm in the group that will dictate when to move on. It is not always necessary to have all postings before doing so. Some moderators use a general rule of waiting for at least two-thirds of the responses to appear before jumping to the next question.

Q: How does the absence of body language affect the results?

Face-to-face focus groups and online focus groups should not be compared. Instead, the objectives of the project should be evaluated to determine which methodology will best serve the project's needs. If you apply the online methodology appropriately, the absence of body language

will not be an issue. The learning achieved using online focus groups can often be more in-depth, as with BBFGs that generate a great amount of data. Currently there is not much information surrounding how the lack of body language impacts qualitative findings through this methodology.

Q: What is the attention span of a respondent and how does a moderator maintain the enthusiasm and interest level of the group?

The enthusiasm of the group can be affected by a number of variables, including:

- the interest level of the participants;
- the time of day — participants can be tired late in the evening;
- the changing of visual stimuli;
- the use of humor, html language, and punctuation;
- warm-up exercises;
- spirited conversation in the waiting room;
- the pace and tone established by the moderator.

Ninety-minute online focus groups

are the most common, but this does not mean that longer groups will be less successful. Keep in mind that respondents are reading from a computer screen continuously and tend to get burned out if the group is too long. However, as with traditional focus groups, if respondents are highly engaged by the topic you will find it difficult to get them to leave the room. Scheduling groups with a 30-minute break in between will help if the group runs overtime. This also gives the moderator a short break.

Q: What techniques help make BBFGs less like serial questioning?

Ninety-minute online focus groups are the most common, but this does not mean that longer groups will be less successful. Keep in mind that respondents are reading from a computer screen continuously and tend to get burned out if the group is too long.

Due to the large amount of text, respondents may not take the time to read everything written in a BBFG. Instead they may choose to only answer the moderator's daily posted questions, resulting in something that resembles simultaneous one-on-one interviews. Encouraging respondents

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to read previous postings on a daily basis and respond to them can reduce this tendency. It is important that respondents understand that interaction with other participants is one of their responsibilities. Some helpful suggestions:

- Send out e-mails to inactive participants directing their attention to a particular posting.

- Try not to add any verbal clues to your postings that might be interpreted as closing a discussion thread.

- Let respondents know that you will keep the BBFG open for an additional couple of days so that they may take time to add or review anything they may have missed.

- Formulate questions that require participants to give you a timeline of their behavior. (This is what I used to do... This is what I do now... I plan on doing this in the future...)

- Stay away from closed-ended or brief questions that only require brief answers.

Q: *What are the best ways to keep attrition rates down for a BBFG?*

BBFGs require a high commitment from respondents and they will lose interest if the discussion is not engaging. Keeping the topic lively and including probing several times a day helps keep participants engaged. Respondents will need to understand their visit requirements at the outset. E-mails and/or a tickler on "Today's Topic" serve to remind participants of their promise to log on daily. Some BBFG software offers a feature that sends respondents an auto-notification that their posting has received a reply. This is very effective in getting them to return and read the other postings.

A daily incentive, such as paying them \$20 for each day they visit twice and leave a thread in the discussion, is another approach that has been effective for some BBFG moderators.

Q: *What is the best way to handle lengthy transcripts when doing analysis?*

Analysis techniques are a highly individual process. Transcript use in analysis will vary from moderator to moderator. Online focus group tran-

scripts may be easier to work with because of their formatting; most are in a CSV (comma separated value) format which can be easily manipulated or merged with other data. Ask the online facility if the transcripts can be exported to Microsoft Excel or Word or whatever format you feel most comfortable with. In addition, transcripts are generated immediately and can be reviewed while the group is fresh in the moderator's mind. Keep in mind BBFGs generate

an enormous amount of text and this requires additional reading and analysis time.

Q: *How important are the keyboard skills of the moderator?*

The keyboard skills of the moderator can be a limiting factor to probing on-the-fly. The availability of facilities that offer pre-loaded discussion guides and generalized probing questions make a moderator's typing speed less of a factor. However, communication with clients via private message

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will be difficult if the moderator is a slow typist or is acting solo (without a typing assistant) during real-time groups. Some first-time online moderators choose to use a typist in order to familiarize themselves with the dynamics of an online group and not become overwhelmed.

Other questions

Q: *What is the typical cost to do an online focus group?*

Pricing an online focus group fol-

lows the same breakouts as traditional groups: study design, recruitment, facility rental, moderation, incentives, analysis and report writing. As a general rule, the costs for these items are not that different from traditional groups. When bidding a project, keep in mind recruitment may take more monitoring. The real cost difference between traditional focus groups and online groups is that there is no travel cost for the moderator or observers. Also, transcripts of sessions are auto-

matically recorded so there is no transcription cost to pass along to the client.

Q: *Have side-by-side comparisons or validation studies been done addressing online focus groups?*

Researchers have only recently started to try to validate this new methodology and there is very little published information in this area.

Q: *How can quantitative studies be used in conjunction with online focus groups?*

The objectives of your study will dictate whether or not a quantitative piece is needed before, during, or after qualitative research. Following are some possible approaches:

- Online focus groups can be used to uncover information used to create quantitative studies.


- With Web-driven surveys, it is possible to drive potential respondents to an invitation to participate in an online focus group based on their responses to the survey. In essence the survey serves as the screener.

- Some online focus group facilities can program surveys to be inserted into the discussion. The results can immediately be shown to the moderator and observers. In some cases, immediate tables can be generated from this data.

Q: *How does the client experience compare to traditional focus groups?*

Those experiencing an online group for the first time will be more satisfied if they know what to expect. For example, the discussion will move quickly — perhaps too quickly for some. But transcripts are immediately available for their review. Clients must be cautioned not to be distracted by other activities and to keep up with the reading.

Q: *How does respondent satisfaction compare to traditional focus groups?*

At this point, we can't offer a definitive answer. However, many researchers will tell you that respondents express to them how much fun, or how educational, the online focus group session was for them. As with traditional groups, respondent satisfaction is dependent on many variables. 

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Successful online qualitative market research

By David P. Bradford



Editor's note: David Bradford is vice president of international sales and marketing of Itracks International, a Canada-based developer of online research software. He can be reached at 203-259-4061 or at dbradford@itracks.com.

It would be difficult to find another research methodology that has overcome the challenges and objections encountered by online qualitative research. When the first groups were conducted (around 1994), they met the

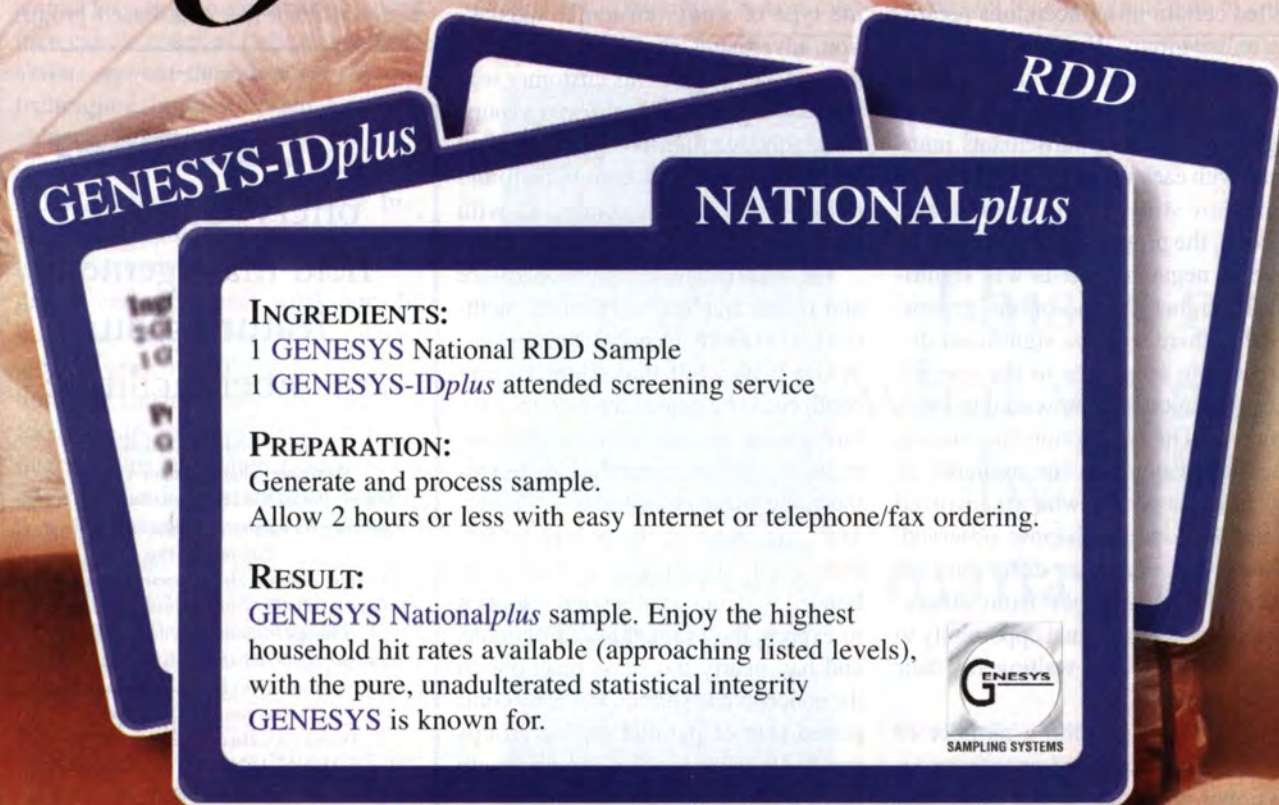
typical resistance and skepticism any new, unproven research methodology must overcome. In addition, potential researchers were faced with a number of obstacles: a limited sample, a myriad of technological complexities, criticism over the lack of non-verbal clues, and few ways to learn how to properly conduct the research. However, the potential of faster turnaround, lower costs, and greater convenience were too powerful to ignore, and better research software tools, along with improvements in Internet expansion

and connectivity, fueled growth. Recent academic research findings and conference case studies provide compelling evidence that results comparable to traditional methods can be achieved with proper online qualitative methods in appropriate applications.

Comparing online and traditional methods

Miller and Dickson (2001) refer to important academic research conducted by the AC Nielsen Center at the

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University of Wisconsin that provides the most complete analysis and comparison of traditional and online qualitative methods to date. Nine groups in each of three modalities (in-person focus groups, online focus groups, and telephone focus groups) were conducted and the findings compared. According to Neli Esipova (the lead author of the study, now with the Gallup Organization), three main research findings stood out and dispelled certain misconceptions regarding online groups. First, although there were observed differences across modalities in the proportion of speech segments in which participants interacted with each other, these differences were not statistically significant. Second, the proportion of strong (positive or negative) words was significantly higher for the online groups. Finally, there were no significant differences in responses to the specific sensitive questions presented to these groups. "The interaction that occurs does not depend on the modality as much as the people who are involved in the discussion," Esipova observed. "The online dynamics differ because there is less influence from others' opinions and more equal opportunity to respond rather than waiting for their turn to speak."

These findings echo a number of presentations delivered at recent professional conferences that document comparisons of online and traditional methods. According to Tim Stehle, senior director of research at KnightRidder.com, there is virtually no difference when it comes to the integral components of a study, regardless of the methodology. His experiences with traditional focus groups were compared to a series of 25 online groups that dealt with branding, consumer benefits, and other marketing research issues. According to Stehle, "Whether real or virtual, a study needs to be conducted in an appropriate research environment with a qualified moderator to manage the project and deliver a quality report.

"The recruiting matters a lot," he adds, "and it takes time to be effective. Just like traditional focus groups, you are going to have some respon-

dents and sessions that are duds, but at least you don't waste a day getting there and another day getting home."

Maritza DiSciullo, director of market intelligence for AT&T Broadband, has presented the results of parallel research studies conducted within AT&T Customer Sciences. Their purpose was to compare several traditional data collection methods with online data collection methods, and examine any differences in responses based on the type of study (customer satisfaction, advertising, product concept evaluations, etc.). Out of six customer segments where traditional focus groups were conducted, three were identified as appropriate for a comparison and online focus groups conducted with them.

The study concluded that face-to-face and online qualitative research methods lead to nearly identical study results. While it was felt that slightly more depth could be gained through face-to-face groups via interpersonal communication, online research still derives the same main perceptions, opinions, and concerns from participants. Participants in both types of discussions bonded with one another and felt open to express their thoughts and opinions and had nearly the same reactions to the concepts and stimuli. Recently completed sets of parallel online groups resulted in mirroring these findings with small business owners.

"We all need to realize that we are in the beginning stages of online qualitative research and still finding out some of the things that we need to do," DiSciullo says. "When used with the right audience and with an experienced Internet moderator, online groups are just as reliable as in-person groups. The onus is on the researcher to make sure it is an appropriate application, recruiting is properly conducted, and the moderator has the right skill sets and experience for online groups."

Moderation in all things?

According to Sweet and Walkowski (2000), very few QRCA moderators they surveyed had any experience moderating online groups, and even fewer had done more than a handful. The fact that so few had successfully

made the transition to online moderating may be due to either technical or philosophical reasons. Some might be resistant to learn the new technical skills, or alternatively, feel they are unable to provide meaningful analysis without the non-verbal communication clues they been trained to rely on.

Most moderators will find it easier to conduct bulletin-board focus groups, as they are more technically forgiving and don't require the fast typing skills essential for a live chat-based group.

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According to Naomi R. Henderson, president and founder of RIVA, a firm that provides moderator training, new online moderating courses were added to accommodate researchers wanting to increase their skills and develop good practices in this area. "A truth about online moderating is that the moderator who does this well is one who has shifted their paradigm about what moderating is," says Henderson. "A good online moderator needs to be a good face-to-face moderator first and then can be coached to fine-tune their skills, prevent the adoption of poor techniques, build confidence and be able to offer a more diverse set of skills to their clients."

Jeff Walkowski of Qualcore Inc. teaches classes based on his experience with both chat and bulletin-board groups and conference workshops he has conducted on the subject. "There are still some limitations on interventions that can be used during an online focus group," he says. "Some of these interventions, projection techniques for example, can be modified for the online environment if they are simplified and used in a more basic form. Studies that require tactile reactions to stimuli would not yield the same feedback that a traditional setting provides. Other interventions such as picture sorts and collages may eventually become technically possible but are, at best, very cumbersome to execute. It is possible to send stimuli or homework assignments to respondents before the groups, but it adds complexity to the process."

Raw recruits or well done?

Successful recruiting for online or traditional qualitative studies requires additional steps to locate the best possible respondents to provide meaningful insights. In a traditional focus group, participants who are unable to articulate their thoughts and feelings or unable to speak the language would be considered unacceptable. The same holds true in the online version, particularly if respondents cannot type well or are ineffective in expressing their emotions, thoughts and feelings while using a keyboard. Screening questions for online qualitative studies

must address their Internet comfort level, chat room or e-mail experience, and include a typewritten response to an open-ended question. Asking these questions before the session begins allows you to avoid having unqualified participants in your study. Other criteria when recruiting for online qualitative include determining if they have adequate computer and Internet connectivity, and screening for any bandwidth or plug-in requirements.

Online opt-in recruiting sources may

not be cost-effective for smaller projects or those requiring rapid turnaround. Client-supplied sources including existing customer databases or Web-based random intercepts are fast and very cost-effective for many studies. For smaller online qualitative projects some electronic panels are effective, as is traditional telephone recruiting (which also provides an important validation component). Open-ended questions in Web screeners or sent by e-mail will help to con-



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firm both a potential panelist's Internet capability and their ability to articulate a meaningful response.

"Response and show rates will vary widely depending on the recruiting source, incentives, and the motivations of the respondents," says Ira Goodman, vice president at Custom Research. "Over-recruiting, reminder e-mails and phone calls, and additional screening may add slightly to the costs and preparation involved in an online study, but are preferable to a disappointing turnout and inadequate findings."


Right tools for the job

Online qualitative is continuing to evolve into an array of new methodologies that should leverage the uniqueness and power of the Internet in appropriate research situations, rather than virtually imitating traditional methods. Any new online methodology used must still be the best match for the desired research objectives. One such application is online one-on-one interviews while presenting stimuli.

"Favorable comparisons of online and traditional focus groups with college students resulted in our applying the technology to another segment of our Internet-based customers," says David Vázquez, who conducts qualitative research for CDNOW. "In a single day, we've conducted individual interviews with key international customers that would have been impossible using traditional means within the available budget and timeframe."

At the other end of the size spectrum, the growth of large participant bulletin-board focus groups is taking online qualitative research into entirely new directions. In recent concept testing for the college market, a 60-person bulletin board focus group was conducted over a five-day period. According to Juan Garcia, vice president of the youth market research consultancy U-30, "We asked six segmented groups of college students a series of 40-50 questions which needed detailed verbatims that we could probe further. We were impressed with

the amount of quality data we collected and the extremely high participation rates of the target market."

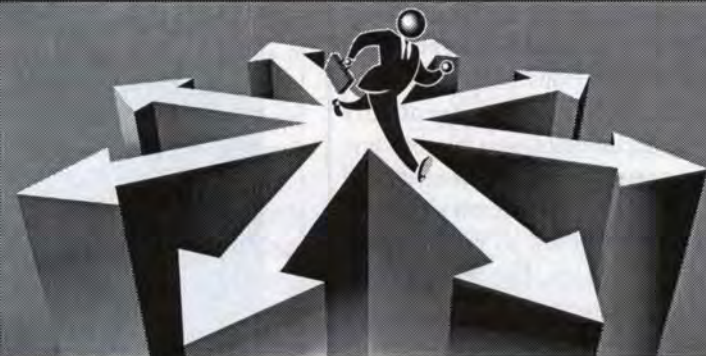
The beginning of online qualitative studies presented early researchers with formidable challenges, many of which have now been overcome or minimized. Today's researcher has better technology, a more diverse online population, numerous training opportunities, and sophisticated online research tools developed specifically for their needs and creative uses. We are just beginning to realize the potential for online qualitative research, and our understanding will increase as more online qualitative studies are conducted and the findings analyzed. 

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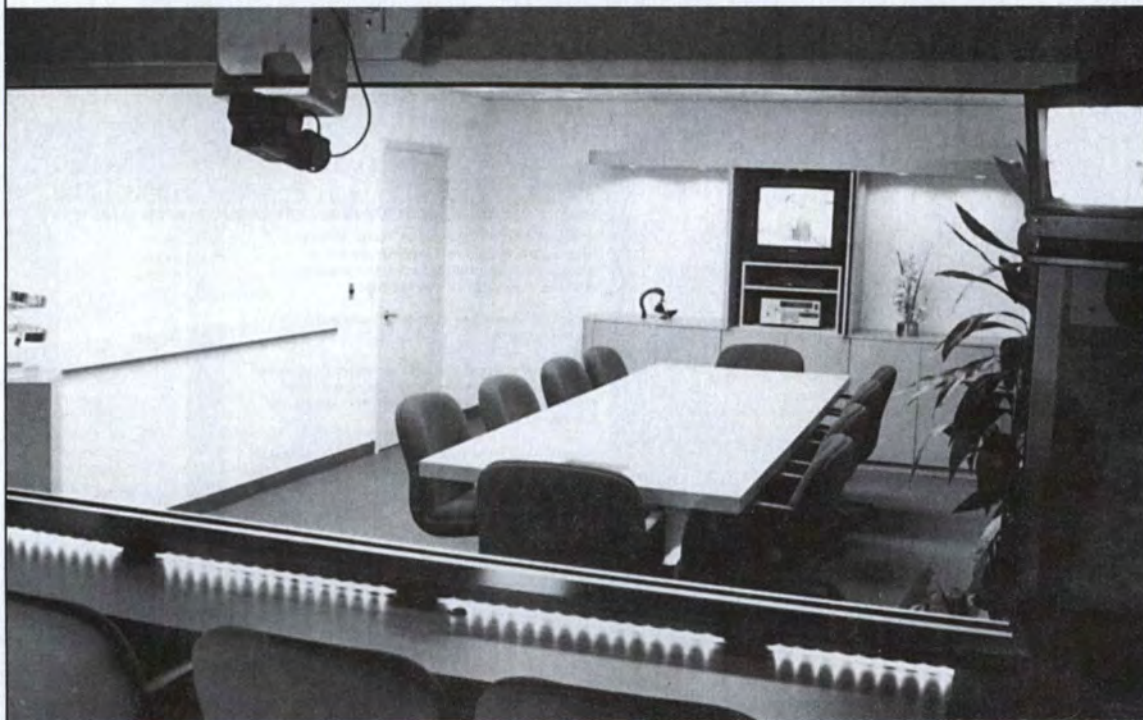
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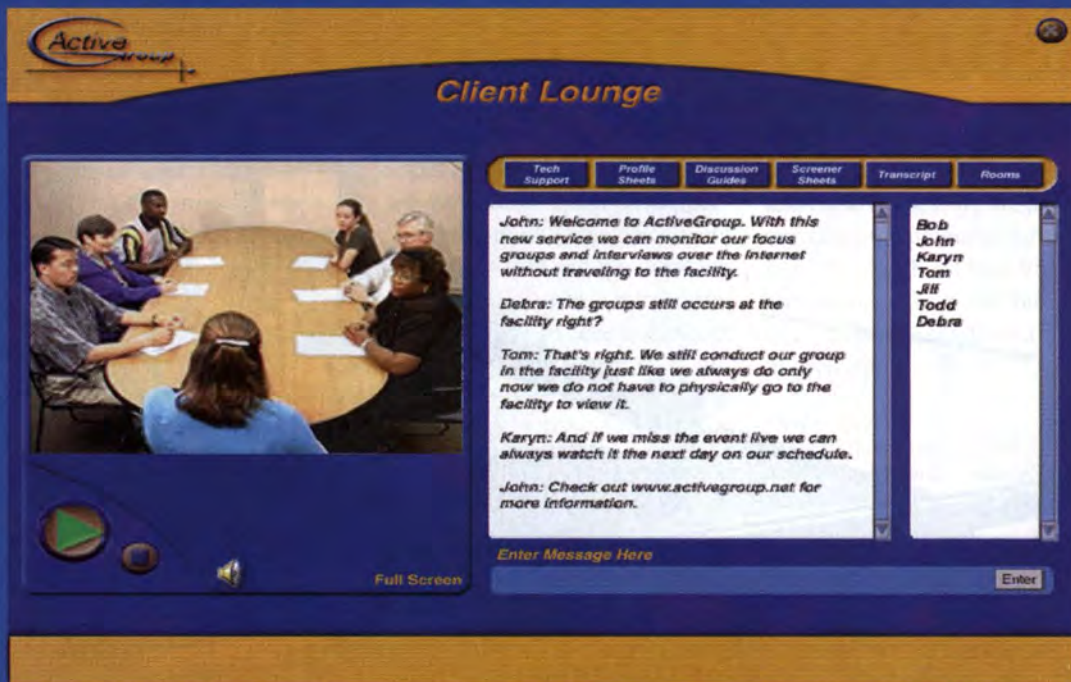


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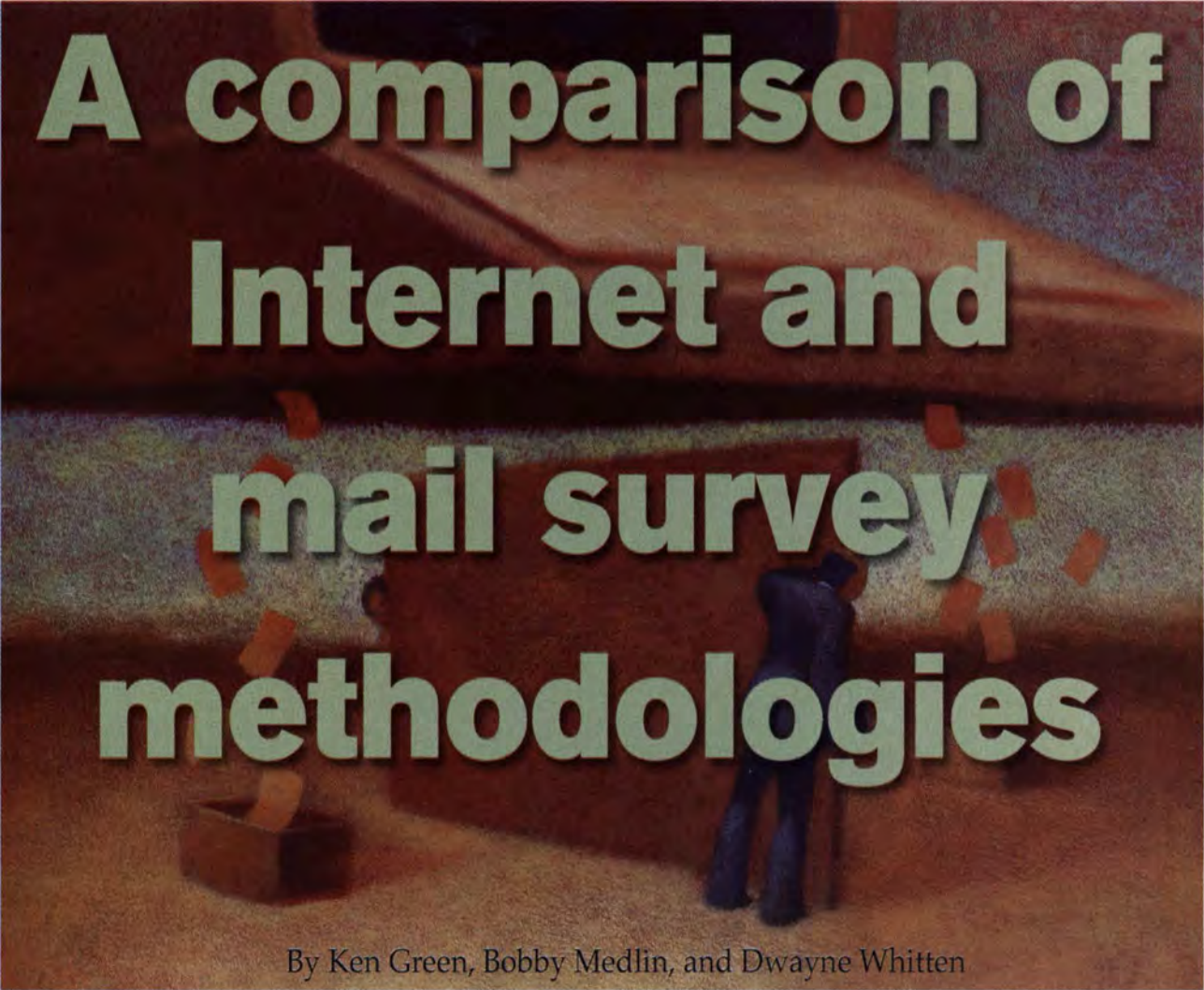
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A comparison of Internet and mail survey methodologies

By Ken Green, Bobby Medlin, and Dwayne Whitten

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Survey instruments serve as the primary means of data collection for organization researchers. Data collection using survey instruments is both costly and time consuming. The phenomena under observation by organization researchers change rapidly, making it desirable to shorten the research pub-

lication process. Dickson and Maclachlan (1996) compared the productivity of fax and mail survey methodologies. They found that data collected using the fax survey method was consistent with that collected using the more traditional mail survey method and that fax responses were received more quickly and in greater numbers. The purpose of this study is to identify and investigate the use of a third alternative: Internet surveys.

Internet and mail survey methodologies are compared on the basis of data consistency, speed of response, response rate and cost. Advantages and disadvantages of the Internet and mail alternatives are identified and discussed.

Researchers using survey instruments to collect data seek to 1) improve

response rates, 2) shorten the time required for data collection, and 3) reduce the cost of data collection. The use of an Internet surveying methodology offers possibilities for improvement in all three areas. Investigation of the efficacy of Internet surveying is necessary to determine if, in fact, response rates can be improved, time can be saved, and costs can be reduced.

The general purpose of this study is to provide an empirical evaluation of the use of Internet surveying methodology compared to a mail-based methodology. The objectives of this study are to compare the data consistency between Internet and mail survey methodologies and to compare response rates, response times, and costs associated with the two methodologies. The comparisons are

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necessary to identify the efficacy of the Internet survey methodology.

The study provides researchers with information to assist in the selection of a survey-based data collection methodology. Dickson and Maclachlan's (1996) results support the use of a fax survey methodology as a viable alternative to mail surveying. This survey provides information relating to a third methodology, Internet surveying.

Literature review

Yu and Cooper (1983) conducted a comprehensive literature review of techniques used to increase response rates to questionnaires. In general, they found that, as personal contact, the use of incentives, and the application of follow-up measures increase, response rates increase. While personal contact, incentive, and follow-up increase response rates, they also increase costs. Their review included 389 mail surveys with a weighted average response rate of 47.3 percent and a standard deviation of 19.6 percent. Dickson and Maclachlan (1996) sought to compare fax and mail survey methodologies. They found that the data collected was consistent across methods and that fax methodology yielded improvements in response rate and response time. Dickson and Maclachlan (1996) contend that surveying by fax is less costly than mail surveying but they offer no specific analysis to support their contention.

Technology supporting the Internet has advanced rapidly, making it possible to collect data using an Internet survey methodology. This newer methodology remains untested. This study compares mail and Internet survey methodologies. It is hypothesized that 1) data quality will be consistent across methods, 2) Internet survey methodology will yield a significantly higher response rate than mail surveys, 3) Internet survey methodology will yield a significantly faster response time than the mail methodology, and 4) Internet survey methodology will cost significantly less than the mail methodology.

Methodology

A questionnaire was developed for the purpose of collecting data related to the use of peer evaluations by AACSB-accredited schools of business. The sample frame was systematically divided into two groups. The questionnaire was administered to one group using a traditional mail survey methodology; the second group was asked to respond electronically through the Internet. MANOVA was used to ascertain data consistency. Response rates and times and costs were assessed and compared.

The questionnaire used in this study was constructed for the purpose of collecting data related to the use of peer evaluations as part of the business faculty evaluation process. The peer evaluation data will be analyzed in a follow-

ing study. A sample frame of approximately 350 Association to Advance Collegiate Schools of Business-accredited business schools was identified using the AACSB 98/99 Membership Directory. The sample frame was systematically divided into two groups. Deans of business schools in the first group were mailed a peer review questionnaire. Deans of schools in the second group were e-mailed a request to respond to the questionnaire at a specified Internet address.

Paper questionnaires were mailed on a Friday afternoon, and e-mail messages sent the following Tuesday morning in an attempt to approximately match receipt times. The paper questionnaire was headed by an appeal to respond and each was accompanied by a self-addressed stamped return envelope. The e-mail message sent to deans in the Internet survey group included an appeal to respond to the electronic questionnaire posted at a specified Internet address.

Results

Some support for Hypothesis 1 (data quality will be consistent) was found. The SAS MANOVA procedure was used to compare data from the mail survey to data from the Internet survey. Wilk's Lambda, Pillai's Trace, Hotelling-Lawley Trace, and Roy's Greatest Root tests all returned probabilities greater than F of .5117, indicating no significant difference between the mail and Internet data. This comparison of data sets used only data from questionnaires with yes responses to Question 1. Question 1 on the questionnaires asked whether peer evaluations were included as part of faculty evaluations. Fifty-eight percent of the Internet respondents and 49 percent of the mail respondents answered yes to Question 1.

Support for Hypothesis 2 (higher response rate for Internet methodology) was not found. The response rate for Internet surveys was 24.54 percent; the rate for mail surveys was 30.11 percent. While both response rates are reasonable, the Internet methodology did not surpass the mail methodology.

Support for Hypothesis 3 (faster response time for the Internet methodology) was found. The average response time for Internet respondents was 2.45

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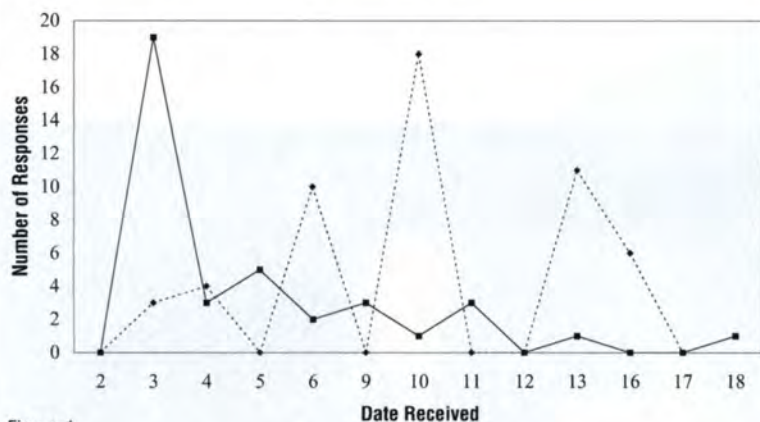


Figure 1

---●--- Mail Responses —■— Internet Responses

Cumulative Responses

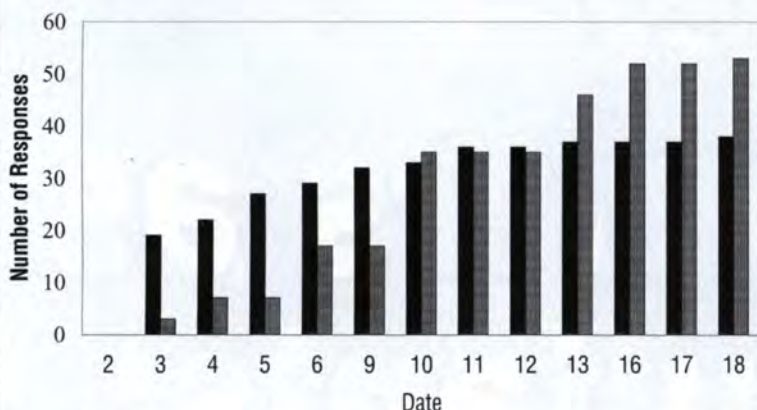


Figure 2

■ Internet Survey ■ Mail Survey

days; the rate for mail respondents was 11.85 days. Figures 1 and 2 illustrate the return patterns for the alternate survey methodologies.

Support for Hypothesis 4 (lower cost for Internet methodology) was found. Each mail-out required a stamped and addressed envelope, a three-page questionnaire, and a self-addressed and stamped return envelope. None of these costs were incurred during the electronic surveying process. Preparation costs for the two methods was considered to be approximately equal.

Conclusions

Results indicate that the Internet survey methodology may be a viable alternative to the more traditional mail survey methodology. Data collected was found to be consistent across the two methods. While the mail response rate exceeded the Internet rate, both rates were above 20 percent. The average

response time was significantly shorter for Internet respondents, and the Internet process was overall significantly less costly. Certainly, additional investigation into the efficacy of an Internet survey methodology is warranted. Replication of this study is necessary. The Internet methodology should be revised in an attempt to garner higher response rates. *TM*

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listen

Customers as consultants: is anybody listening?

By Amy Yoffie

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“I know you think you understood what I said, but what you heard is not what I meant.”

When I hung these words on my wall in college, little did I know that 30 years later this '60s slogan, directed at any and all authority figures, would turn into the marketing cry of the new

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In today's Digital Age, customers are aggressively seeking businesses that can understand their needs and desires and respond to them. No longer content to be talked at, they are insisting on two-way communication, some form of regular ongoing dialogue, some form of making you understand what they need.

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Over the years, market research has

gotten a bad rap. It's been seen as stodgy, rigid, error-prone, and expensive. It's been criticized for creating layers between decision-makers and customers. And, maybe in some instances it has. But the real issue is companies' failure to recognize that its value depends on how it is used.

For market research is about listening to your customers. In fact, successful companies are those that don't pay lip service, don't “sort of” pay attention, don't operate in a vacuum; they really and truly want to know what is on the customer's mind. Their ultimate goal, not surprisingly, is to



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ensure that each customer's purchase is not his or her last. But they know that the way to maintain loyalty is to be flexible and in tune with individual needs.

And, there are two types of market research, formal and informal. While formal research provides a periodic mechanism for rigorous, in-depth data collection, informal research is the means for qualitative feedback on a more ongoing basis. A market research study gathers information you need to know about your customers, while informal research is information your customers want you to know.

Disciplined way

Companies should look to formal market research — online focus groups and Web-based surveys — for a disciplined way of learning from customers, in order to make crucial business decisions. These methods constitute rigorous, high-quality research that yields truly actionable data. What can be learned?

- *Know your customers:* Most com-

panies have no clear idea of who is visiting their Web site and why. They have tracking data, but have failed to leverage the Internet to get closer to their customers. An effective Web-based visitor profiling survey gains an understanding of the people who visit and utilize the site; the areas of the site they use, the reasons why, and the frequency of use; the degree to which visitors' expectations have been met; visitors' experiences and evaluations; and how the site compares to those of its competitors.

- *Understand buying habits:* Beyond understanding who visits their sites and why, companies that want to engage in e-commerce have to develop an efficient purchase process. A surprising 80 percent of those who start a Web-based purchase abandon their virtual shopping basket. Few companies know why this happens, and most think that it is impossible to get the data they need in order to reverse this trend.

In fact, formal market research can survey both the shopper who bails out and the one who completes a transac-

tion, to yield data that can mean the difference between making sales and losing them. The immediacy of this type of research is unparalleled in its ability to determine rapidly what is working and what is not. And, results can be provided in real-time to get instant data on what is happening while your customers shop. Both in the early stages of developing an e-commerce solution, and in the actual implementation, the purchase process can be refined to convert customers from shopper to purchaser.

- *Meet your customers online:* Of course, not all consumers come to a Web site in order to buy something; sometimes they are simply looking for information or activities to do. "Eyeballs" and "stickiness" generate the sources of revenue for many sites, so making sure that the site content meets visitors' needs is crucial.

To truly evaluate whether a Web site is reaching its target audience, companies can conduct online focus groups to gather a great deal of data. Online groups allow for geographic dispersion, deeper levels of participation than traditional focus groups, and are more cost-effective. Meeting your target audience online can help you test advertising, concepts and new products.

There is a second kind of online market research, which is informal, ongoing and also yields valuable information. Informal research includes always-open chat areas, discussion boards or online events. And while these methods do not yield serious, statistically valid data, they do provide indispensable information straight from the mouths of customers.

Informal research builds two-way communication by letting customers initiate conversation. These activities can be the key to a successful e-business, by guiding companies to heed three rules of the Web.

- *Always be open, 24/7:* We are in a world where people are knocking on your company's online front door 24 hours a day, seven days a week, so you must always be ready to listen. There are many informal ways to give customers a forum where they can provide feedback. Discussion boards and

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always-open chat areas are two important ways to increase dialogue.


• *Give your customers a say:* The Internet itself provides a vast network of consultants, who happen to be the taste-makers and opinion leaders of your products. This group that consistently interacts with your offerings is priceless for helping solve difficult design, branding and positioning problems. By inviting them to make their opinions heard, and showing them your new product first, you can learn how things sit with your most passionate customers. For example, an informal forum, such as a virtual auditorium meeting with customers, can establish a two-way communication system to obtain feedback on product design plans.

• *Get and stay interactive:* The Internet provides not only new technologies, but its interactivity creates a new culture, new ways of doing things and new rules to go with it. Your TV talks at you. So does your radio. The Web does not. It talks with you.


The Web is your best platform for developing two-way communication and building your customer relationship management activities. While you will still want to offer your customers toll-free numbers and snail mail, you can greatly broaden your reach via discussion boards, online events, e-mail, and chat areas.

Listen to them

The best way to turn your customers into your consultants is to listen to them — using a combination of formal and informal research. Both will let you reach consumers on a personal level, in unprecedented numbers and at uncommon speed. Both will provide the data you need to identify the best means for evolving your brand, not to mention involving your customers.

Online research is more than gathering data on your customers. It is more than selling them on any specific product or service. The purpose of formal and informal online research is to get to know your customers intimately and to develop life-long relationships with them. This is how your customers become your very best consultants. 

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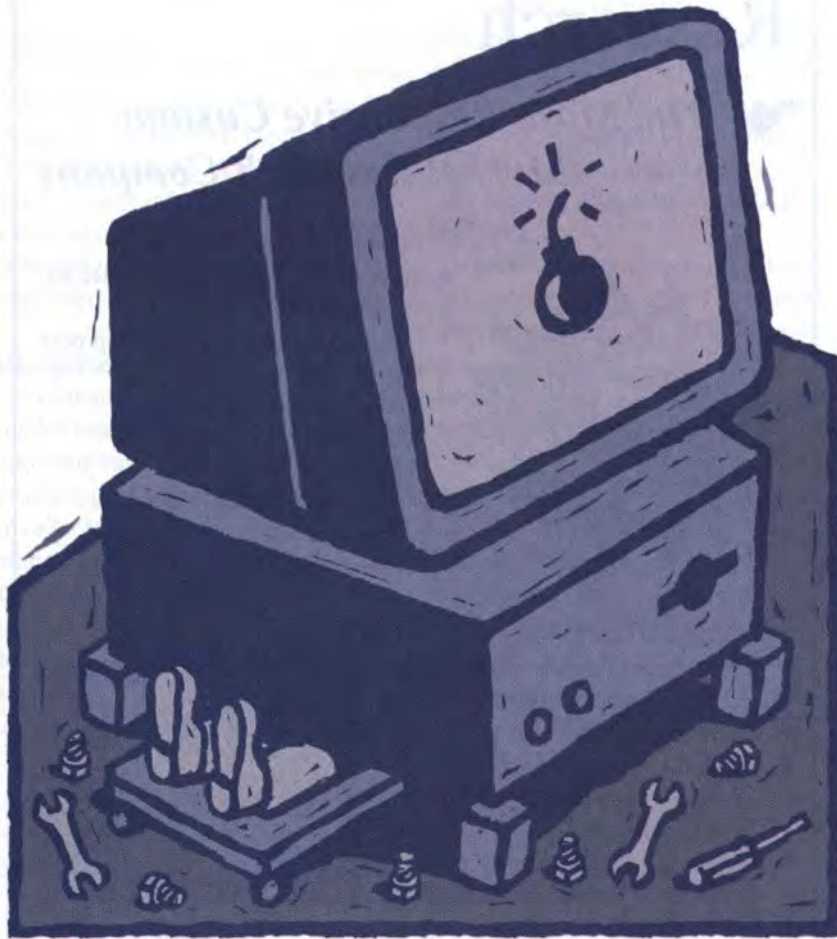
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Tapping into the usability dimension

Test your product before it goes online

By Karen Seidler-Patterson and Michael J. Patterson

Editor's note: Karen Seidler-Patterson and Michael J. Patterson are principals of Usable Solutions, LLC, a firm with offices in New York City (212-588-0297) and Colorado (719-487-0563).

As the dust settles from the stampede to get on the Web, companies are taking a more reasoned approach to their online product development, with well-placed attention on the quality of the customer experience. As numerous companies have already painfully learned firsthand, if you neglect the customer experience, your customers will take their clicks elsewhere.

Creating a positive customer experience is critical to any online product success, whether we're talking about business-to-business, business-to-con-

sumer, or internal products. What defines the customer experience? Certainly, a product filled with bugs will make your customers unhappy. However, over and above basic technical performance issues, it is the usefulness and usability of the product that ultimately defines the customer experience.

Usefulness refers to whether the product has the information, features, and functions that the user needs. It answers the customer's question: "Would I want to use this site?" Usability, on the other hand, has to do with whether or not the site communicates its content and functionality to the user and how well a user can effectively access and use the site's information and features to perform a task. Usability corresponds to the customer's question "Can I use it?" Each

dimension is critical to the customer experience and if one is missing, a company may fail to achieve its Web business objectives and experience erosion of its customer base.

Traditional market research and observational techniques, such as focus groups and contextual inquiry, can be used to discover what would make a product useful. There is also no shortage of companies offering an array of techniques to evaluate Web site usability. In our experience, there is simply no substitute for directly observing customers trying to use your product through usability testing.

In a usability test, representative users are observed performing realistic tasks with a Web prototype or online product. Usability testing exposes inconsistencies between how the users expect to interact with the

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product and how they actually must interact with it. It also exposes the obstacles preventing users from successfully completing transactions, accessing product content, or performing other desired tasks.

Usability testing is about what people actually do, not what they say they do. This differentiates it from focus group studies, which are often inappropriately used to elicit usability information, or from online research methodologies that rely on self-reporting. Observing the usability test allows the product team to make a connection with their customers and see their users in action with their designs. The impact of directly witnessing usability tests often transforms initially reluctant product team observers into ardent usability advocates.

Usability testing is well-suited to informing online product design. It is easily adapted to any stage in the Web development process, allowing the product team to evaluate the usability of early, paper prototype concepts, low- or high-fidelity prototypes, or live products and competitor sites. The ability to assess designs throughout development can prevent product teams from wasting critical resources on the wrong design paths and help guide design choices at critical product development junctures.

The nuts and bolts of usability testing

Usability studies do not need to be expensive or elaborate to provide high-quality insight. However, they do need to be well-planned and executed. All effective usability tests start with a test plan identifying goals and the measurements that will be used (e.g., instances of user frustration, number of successful task completions). Quantitative metrics are sometimes of interest, for example when benchmarking is the goal or where shaving time off performing tasks is critical to save money or lives. However, quantitative studies usually require larger numbers of participants and may sacrifice rich verbal insight into relevant issues.

In qualitative usability studies, participants are asked to think aloud while

performing realistic task scenarios. Thinking aloud helps to expose user expectations, problems, and frustrations with the product. The participants' actions are also observed (e.g., which navigation route is being taken to do a task, what do participants do when they can't find needed information). It is critical to carefully observe the participants to ensure that what they are saying syncs up with their actual behavior. We often see a discrepancy in which participants say one thing but do another.

These incongruities are particularly valuable in a usability test because they point out things that are unclear or confusing to the user. In a recent usability test of an online brokerage application, for example, a test participant exclaimed "Wow, that was easy!" when, contrary to his own intentions, he unwittingly sold a stock instead of buying one. This disparity between attitudes and actions is a strong argument in favor of usability testing over usability evaluation methodologies that are wholly grounded in self-reporting.

Task scenarios are selected to represent the typical or critical tasks for which customers will be using the product. These tasks are often identified during earlier phases of research. Task scenarios often include both directed tasks, in which the participant is asked to perform a specific task, and self-directed tasks, which target user-chosen goals or browsing behavior.

A few participants go a long way...

You don't need many participants to uncover the major usability flaws, although the participants do need to be representative of your target user group(s). For a qualitative usability study, most experienced usability specialists know that using about five participants per target group is sufficient to provide meaningful data. With more participants, you often see diminishing returns on findings, in addition to glazed eyes of observers in the backroom. You need to ensure that the major user groups are represented, even those whom you suspect will differ in the ways they will use your prod-

uct. For instance, when we tested an online benefits management tool that would be used by both general employees of a company and the company's HR benefits administrators, we recruited participants from both populations.

Testing in the lab and beyond

There are a number of choices when it comes to where to conduct testing. Most commonly, usability studies are conducted in a focus group-type facility (either with or without a usability lab setup). The two-way mirror setup at such facilities allows the product team to observe test sessions firsthand and in real time. A usability lab setup provides the additional capability of capturing a picture-in-picture view of the product (e.g., a Web page) simultaneous with a view of the participant, allowing observers to see and permanently record the details of the participant and what the participant is clicking on. While a nicety, a usability lab does add a layer of cost to the study and its absence will not compromise

the quality of the test sessions.

A cost-effective alternative to running the usability study in a focus group facility is to conduct the test sessions in an office or meeting room. This approach is appealing when the number of observers is very small or when facility cost or availability is a serious issue. The downside is that you cannot accommodate many observers in real-time, although videotaping the test sessions (using either a simple video-camera setup or portable usability lab) can extend observer capabilities.

Sometimes it doesn't make sense to divorce the user from the environment in which the product will be used and the critical social or environmental conditions cannot easily be replicated in a lab. In such cases, usability tests can be conducted in-situ, i.e., in the workplace or other environment in which the product will be used. While in-situ studies are somewhat more complicated to conduct and require giving up some control over aspects of the test sessions, the realistic back-

drop can provide very rich usability data.

Involve the team in observation, analysis, and solutions

We find that involving the product team in some manner in the usability testing makes it more likely that usability issues will be addressed in the redesign. Team members can observe test sessions, take notes, and help collate findings by listing observed issues from their notes and describing them with examples and/or performance measures from across participant sessions.

When identifying issues, it is critical to not just consider observations individually, but to see if there are themes or patterns that potentially point to a larger issue (e.g., is there a problem with the tab label or is the problem that the overall content has not been organized intuitively?). During analysis, it is also important to identify the usability strengths of the product, so that redesign solutions can further capitalize on them.

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Once the team has identified the list of usability issues, prioritizing them is helpful. We often employ a simple scale that takes into account both the severity of the problem (i.e., the extent to which the issue will affect task per-


formance) and its expected frequency. For example, a major problem would be one that prevents users from completing a task or causes significant delay or frustration. This would be a high priority fix.

With the list of usability issues and priorities in hand, the team can brainstorm solutions. The prototype or product is then redesigned or refined, based upon the insights.

Test early and iterate!

Undoubtedly, the most common remark we hear from the backroom during usability test sessions is "Why didn't we test earlier?" Typically, companies wait until the product is virtually ready to launch to conduct their usability testing. While certainly any usability testing is better than none, by the time you have a highly functional prototype, it is often too late to address major usability flaws for the current effort, no matter what type of evaluation technique you are using. For instance, six months ago we were asked by a large insurance company to evaluate the usability of a highly functional prototype just weeks before its launch. Our testing identified some major flaws with the overall organization of the product content and the navigation. But the product's information architecture was so far along that only button and link labels could be tweaked. The product launched and several months later, the company finds that it must now revisit the usability issues and the product's information architecture (e.g., navigation, organization) because of such poor customer response.

Building usability into a product is fundamentally a process, rather than a single step. Usable products are most efficiently created through an iterative approach that incorporates the results of the usability evaluation into redesign or refinement solutions, and then tests the product again. We usually advocate quick iterative design-test cycles, to keep pace with the aggressive schedules typical of most online product development organizations.

Ultimately, the earlier in development you implement usability testing, the easier it will be for the product team to absorb and respond to the findings to create highly usable products which truly elevate the customer experience. 



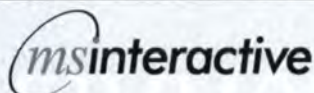
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Using conjoint analysis for Web site development

By Jonathan Schneider and Liz Vandenberg

Editor's note: Jonathan Schneider and Liz Vandenberg are the founders of Square One Research, Atlanta. Schneider can be reached at jonathan@squareoneresearch.com or 404-685-0748 and Vandenberg can be reached at liz@squareoneresearch.com or 404-685-0803.

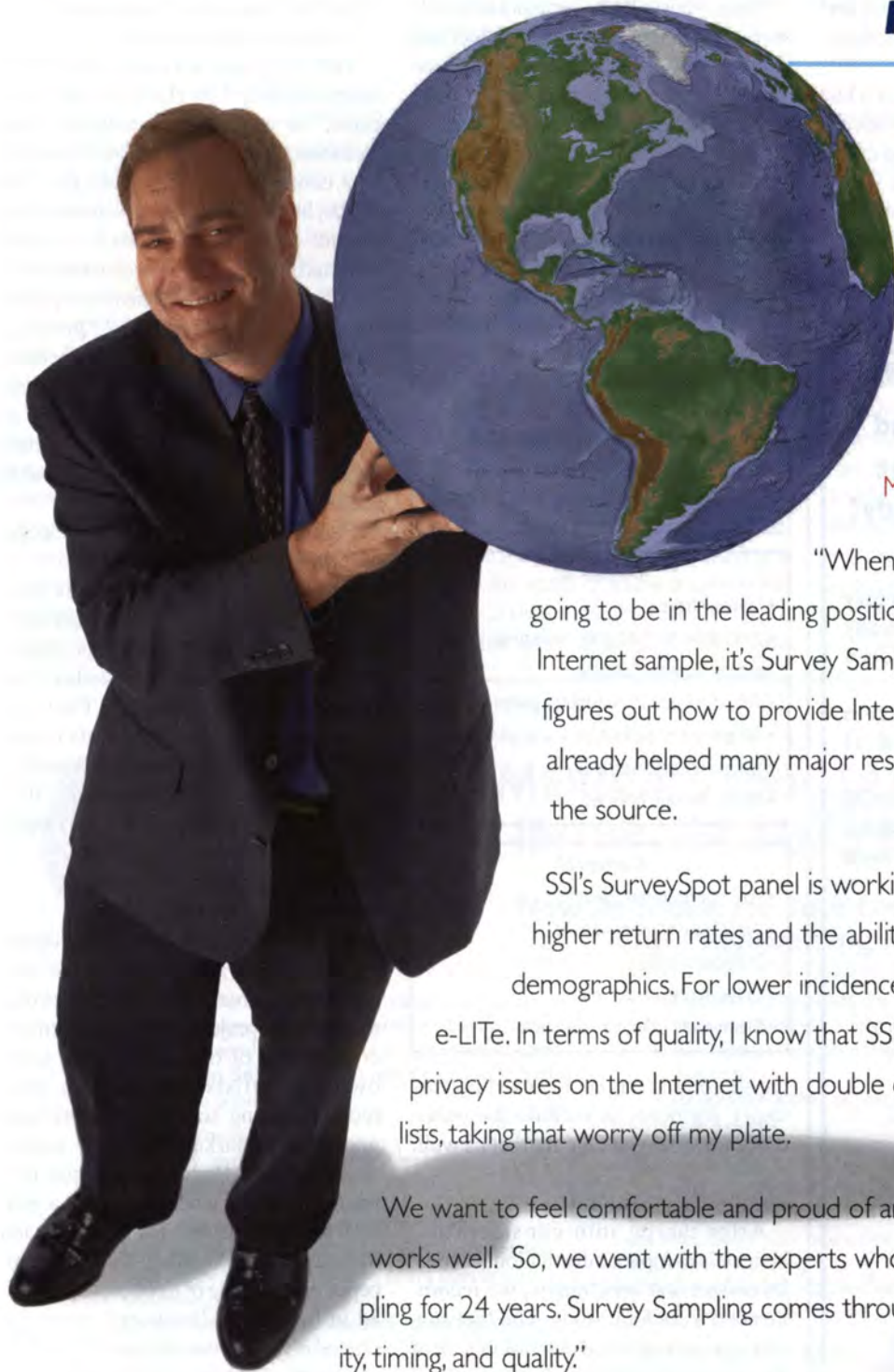
Since its introduction in the 1970s, conjoint analysis has become one of the researcher's most trusted tools to support the product development process. The methodology offers the ability to quickly isolate a product's individual attributes that drive buyer preference while also identifying features that have marginal or negative impact. Results that easily enable various what-if scenarios also make conjoint analysis an ideal choice for clients who demand action-oriented results.

Researchers have applied conjoint analysis to questions related to advertising, pricing, and even package design. The Internet presents another opportunity for its use as a robust decision-making and trade-off analysis tool. Most firms acknowledge that they must have some kind of online presence. But the enormous financial opportunities of the online market give rise to sizeable questions: Should we sell online? Who should we target? What products should we offer? What type of customer service should we provide? What are suitable product delivery timeframes? Companies must make careful choices as the decisions can have far-reaching impacts on the organization and its bottom line.

In this article, we will examine the application of conjoint analysis to support Web site development, using HairInc, a fictitious company based on an actual former project, to illustrate study preparation, fielding, and the application of results.

HairInc needed to make just the kind of tough choices we have described for its new HairInc.com venture. As one of the nation's leading manufacturers and suppliers of professional grooming tools and hair care products, HairInc desired to grow its business and improve its

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margins by doing business online. Yet the company's firmly embedded sales process — exclusively through local franchise distributors — made Internet sales a tricky proposition. The online portion of HairInc's business needed to cooperate with the distributors and find innovative ways to satisfy customers' currently unmet needs.

HairInc was also unique in that it had three distinct customer segments to consider: salon owners; stylists; and cut-it-yourselfers (CIY) not currently served by distributors. Adding one more ele-

ment of complexity to the situation, HairInc was considering online partnerships with several companies that would enable it to sell complementary products such as freestanding hair dryers, styling chairs, and salon management software.

Thus, HairInc's informational needs were to 1) understand what product and pricing options would be most successful on the new HairInc.com, 2) determine which site features would drive preference and which would have marginal and negative effects, 3) determine the type of customer service necessary to support HairInc.com, and 4) decide if

round of focus groups that yielded a number of options for the overall HairInc.com strategic direction, product offering, pricing, features, and functionality. That information along with several internal brainstorming sessions helped the team develop approximately 55 to 60 different elements.

The next step was the creation of approximately 100 HairInc.com "concepts," or various combinations of the elements. While each HairInc.com concept contained approximately five elements, high-level categories dictated the type of elements within each concept. All HairInc.com concepts contained elements related to must-have categories such as "product offering," "pricing," and "customer service." A concept's remaining two elements came from various nice-to-have categories, such as product warranty, delivery, and recruiting, that were not necessarily critical to include in HairInc.com.

Figure 1 shows examples of concepts and their related elements.

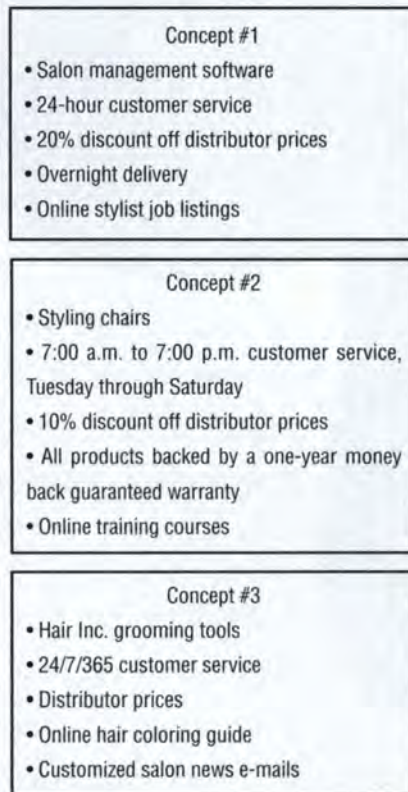
Although conjoint analyses may employ any one of several design techniques (e.g., ratings, rankings, paired comparisons, etc.), the HairInc.com project used a rating method. The study called for research participants to rate each concept in terms of likelihood to use the site (1 = not at all likely, 10 = very likely) in the absence of any other concept.

Fielding the study

While fielding a conjoint study online is an option for some projects, the incidence of HairInc's target audiences dictated that the project be offline. To ensure consistency of data collection, salon owners, stylists, and CIYers were recruited using screening criteria and geographic markets from the earlier focus groups. Participants came to a research facility where they read a general statement about HairInc.com and then rated approximately 75 to 100 concepts. An example of a concept is included in Figure 1. All concepts were displayed on computer screens with several graphical elements included to produce more of a Web look and feel.

While travel to central research facilities was a necessary aspect of the study, participants individually rated all of the concepts. For hard-to-reach and time-strapped targets like salon owners, conjoint offered multiple opportunities to

FIGURE 1



the site should target only existing customer segments or include the previously underserved CIY market as well.

Planning for conjoint

After taking into consideration HairInc's complex informational needs, its budget and timeframes, we recommended a conjoint study. The first step of the project involved determining all of the potential features or elements of the new site that would serve as the conjoint test stimuli. Elements would take the form of text statements such as "salon management software," "overnight delivery," and "24-hour customer service."

The process benefited from an earlier

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complete the study, limited only by the operating hours of the research facilities. As long as the desired sample size for each target was reached, scheduling sessions at various times presented no issues for data collection efforts.

Interpreting the results

With the help of regression analysis, the research data enabled HairInc to determine the effect that an individual element would have on the percentage of participants giving a HairInc.com concept a top three-box score (in this case an eight, nine, or 10). While the analytic process may sound complex to some, actual conjoint data is relatively easy to explain, interpret, and can be quite fun for a client to play with as he or she creates multiple what-if scenarios.

Optimizing the HairInc.com site offering for various target audiences first focused on determining which elements, when combined together, would create the greatest percentage of respondents giving HairInc.com a top three-box score. For the HairInc.com team, some of these elements would require minimal development time while others would

require a longer and more costly commitment. Next, the data revealed which elements had only a marginal impact on overall preference. (It is interesting to note that some of these elements seemed like must-haves during the focus groups.) Finally, we determined which elements would actually have a negative impact on a segment's likelihood to use the site.

Understanding which elements were critical to overall site success while being able to place others on the back burner was invaluable in helping the HairInc team prioritize development efforts and properly allocate its HairInc.com budget. Yet, the data also enabled HairInc to make larger, more strategic decisions. For example, results suggested that stylists and CIYers favored many of the same elements. And, salon owners seemed relatively lukewarm to the overall concept regardless of its elements. Therefore developing a site that focused on the needs of one core market, stylists, would allow it to meet the needs of a new market without much incremental effort.

HairInc also realized that online sales

of such items as salon chairs and free-standing hair dryers — items that only a salon owner would purchase — was going to be difficult. For HairInc.com, it was not necessary to formally partner with complementary product manufacturers, as incorporating their wares would have only a marginal effect on site success.

Straightforward means

In the post-dot-com era, perhaps one of the most pleasing aspects of conjoint analysis is its rationality. The methodology gives companies a straightforward means to narrow the dizzying choices that come with doing business on the Internet. In addition, and unlike some techniques, conjoint benefits from input from a variety of stakeholders. Senior management, internal teams, outside agencies, and past research participants can all help develop the study without necessarily adding to its complexity. As the Internet continues to grow in importance for more and more organizations, an inclusive research methodology such as conjoint should be most welcomed. **74**



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Use online surveys to increase the Web's communication potential

By Jeff Rosenblum

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The Web has always had great promise of being the world's greatest communication tool. However, most corporate communication via the Web goes in one direction — from the brand to the customer. By conducting online surveys, companies from virtually any industry can gain a competitive advantage by making their Web-based communication flow in two directions using online surveys.

Conducting surveys online is relatively easy and affordable. When conducted effectively, the return on investment is so high that no company can truly afford to not conduct them. This article provides an overview of the fundamentals of online surveying.

Typical objectives of online surveys

The reason that online surveys are so valuable is that a brand can learn virtually anything it wants via a properly designed and executed survey. Some examples of survey research objectives include:

- gauge customer satisfaction

across various competitive elements, including quality, price and service;

- assess customer loyalty and identify methods for increasing loyalty;
- measure your target audience's usage of specific brands, products and services;
- determine the likelihood of prospects to purchase new products and services;
- generate responses to marketing efforts, including positioning statements, media sources, advertising copy and design;
- explore issues associated with your brand's Web presence, including usability, content and speed;
- evaluate the impact of advertising

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How to conduct online surveys

Conducting an online survey is a relatively easy process. There are many research firms that can manage the entire process, and there are a few technologies and software packages that can enable you to conduct the surveys in-house.

Unless you have sufficient training in quantitative research, I strongly recommend using a high-quality research firm. (While our firm clearly has a vested interest seeing companies outsource their survey development needs, I can honestly say that the only thing more dangerous than not conducting research is mismanaging or misinterpreting research findings.)

There are seven key stages to conducting a survey online:

- **Develop the project objectives:** I recommend thinking from a results standpoint — do not try to develop the survey at the beginning of the process, try to create the individual pages of the report in your mind. Focus on the two to three things that you want to learn, not the actual questions that you want to ask. The survey will naturally develop after you have identified your core objec-

tives.

- **Develop the survey:** A survey should consist of approximately 20 questions. Many companies conduct longer surveys, but that leads to self-selection bias and respondent fatigue. When in doubt, just remember: the shorter the better. Do not make your objectives too broad. Try to have the survey flow so it progresses in an easy-to-follow question order for your respondents.

- **Program the survey:** There are many new technologies for conducting online surveys. We typically conduct one-page surveys, not multi-page surveys. Our own research has demonstrated to us that this format is most appealing to respondents. If you are conducting the surveys with your own customers, maintain your brand's identity in the graphical layout of the survey. That helps build your brand and improve respondents' focus. If you are conducting the survey with non-customers, be sure that you are working with a reputable company with a database of qualified (and not over-used) respondents.

- **Acquire respondents:** Respondents can be invited to participate in the survey from your Web site via a live link or a pop-up intercept. You can also use a customer database, but do not invite respon-

dents via e-mail unless they have previously told you that they would like to be contacted. We recommend providing an incentive to participate in the survey, for example by donating \$1 to charity for each completed survey or a chance to win a significant prize. Incentives help reduce self-selection bias and show appreciation to customers for spending their time helping you.

- **Collect data:** When respondents submit an online survey, the data typically goes to a back-end statistical package. If feasible, we recommend conducting a survey with at least 400 respondents. A larger base size produces higher statistical validity. Also, it enables you to look at sub-sets of the data, such as frequent purchasers vs. non-frequent purchasers.

- **Report on findings:** Unless you are an experienced market researcher, I recommend working with a market research consultant. A strong report will focus on the topline findings and significant differences in actionable sub-sets of the data. Be sure not to get bogged down in over-analysis of data that does not yield actionable findings.

- **Keep records on file:** All respondents should be asked if they may be re-contacted to participate in follow-up surveys. For those who would like to be re-contacted (typically more than 75 percent of the sample), the contact information and other relevant data should be kept on file. This file can be used as the basis for a proprietary panel, which will enable you to access the respondents quickly, easily and affordably when needs arise.

Reporting on findings

Here is a very strong recommendation: Do not over-analyze your research findings. A good online survey will reveal two to three key themes. For example, the majority of customers are unsatisfied and satisfaction can be substantially improved by lowering shipping costs.

In my experience, many companies look too deeply at their research

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data, trying to find nuggets that could be very helpful, such as recognizing that a key audience segment has a higher propensity to purchase. However, more frequently, by over-analyzing the smaller tactical findings, the broad themes frequently get ignored. Or, many companies suffer paralysis by analysis, meaning that action is not taken because the data is looked at too long and too hard.

This is what I recommend: Use a topline report for your online surveys. Identify the key themes and understand how to act upon the key themes. Communicate your recommendations to your appropriate team members and provide them with user-friendly graphs that support your recommendations. If you are an experienced market researcher or report to an experienced market researcher, it is more than appropriate to search for the hidden nuggets of information in the banner books. However, first get the ball rolling with strategic recommendations

based on topline data, then look for the detailed data.

Moving beyond one-off surveys: how to develop an online customer panel

While online quantitative surveys are extremely valuable, the true power of the Internet can be realized by developing and managing an online panel of your customers.


Proprietary panels are extremely valuable because they enable companies to quickly and easily acquire strategic input from customers on a need-to-know basis for virtually any business issue that arises. For example, if any of the following takes place in your industry or your company, you can find out within 24 hours what, exactly, your customers would like you to do to maintain their loyalty:

- your company or a competitor launches a new product, advertising campaign or Web site;
- a new competitor emerges with-

in your industry;

- your company or a competitor changes product prices;
- your Web site experiences technical difficulties; or
- a new technology emerges that can be used in your industry.

Conclusion

For virtually any company, online surveys should be used to ensure that your strategies, marketing, and product selection are developed with strategic input from customers and prospects. Virtually any objective can be accomplished via an online survey. When conducted on a regular basis, they will create a two-way communication flow that will provide you and your company with a true competitive advantage. Many companies conduct online surveys, but few conduct them on a regular basis and effectively act upon the findings from the project. Start conducting surveys today and start recognizing a competitive advantage tomorrow. 



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An overview of online security approaches

By Fred Bullock



Editor's note: Fred Bullock is senior vice president of marketing at Alchemedia, a San Francisco provider of online security software. He can be reached at 415-864-4652.

The Internet is quickly becoming the medium of choice for today's market research professionals. The Web offers several advantages over telephone or on-site market research studies. Researchers can enrich online surveys with images, text, and other information to add depth to the panelist's survey experience. Panelists often prefer Web-based studies, where they can enjoy the conveniences of anonymity, interactivity, and speed.

The number of consumers willing to participate in telephone surveys is

dropping steadily. Only 30 percent of potential panelists say they are willing to be contacted by phone. On-site surveys conducted in shopping malls and elsewhere can't match the Web for convenience or privacy. And then there is cost: the Internet allows researchers to distribute hundreds or thousands of digital surveys instantaneously and at minimal expense compared to conventional methods.

While the benefits of online research are clear to research professionals, many of their clients are hesitant to commission online studies. Their concerns often focus on information security.

Security challenges for sensitive concepts

The drawbacks of communicating

sensitive and proprietary information online are self-evident. The basic problem, in the words of *PC Magazine*, is that "the Internet is one big copying machine." Web users can cut, copy, paste, save, or screen-capture images and text with a few keystrokes or clicks of the mouse. Even the inexperienced computer user can easily print sensitive information, and then redistribute that material to unauthorized viewers. Many prospective clients worry that posting sensitive product or design information on the Web amounts to little more than giving it away.

Hugh Davis, a technology executive at marketing research firm Greenfield Online, tells of his company's experience in dealing with the information security problem:

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“As a marketing research company we had to turn away many projects because we had no way of guaranteeing that product images would not end up in the wrong hands. The last thing a client wanted was their prototype concept being passed around the Internet. However they still wanted to take advantage of the cost and time savings of conducting the research online.”

Watermarking solutions

The understanding that sensitive information in online surveys could end up in the hands of competitors or the media has compelled market research firms to search for solutions to the problem of online copying. The simplest among these — including scarring, embossing, watermarking, and thumbnails — attempt to discourage users from copying online data.

The practices of scarring and embossing work by degrading the appearance or quality of images. Both techniques involve superimposing an identifying (or in the case of scarring, simply a degrading) mark across the face of a digital image. Both render images useless for most commercial or educational purposes — including those necessary to conducting successful market research studies. Thumbnails can discourage panelists from passing along sensitive images to friends or colleagues; however they are simply too small to be of much value to panelists and can defeat the purpose of the survey.

Digital watermarking works by subtly encoding a copyright owner’s information into digital images. This method relies on enforcement of copyright rather than prevention of information theft. Even if a market research firm could locate images stolen out of its surveys — no small feat given the difficulty of mining the billions of images hosted on the Internet — it could do nothing to reverse the damage that exposure of this information

may have already caused.

Software solutions

Due to the drawbacks inherent in watermarking, scarring, and other image-manipulation techniques, many research firms have tried to develop proprietary security tools. These solutions generally involve replacing images with bits of software code that trigger the display of specific information. Companies can use these applications to prevent end users from saving protected material.

Because their approach to protection focuses on proscribing user action rather than on preventing the replication of information in bytes or pixels, these proprietary applications cannot stop users from screen-capturing sensitive information. This represents a critical breach in security; one that most users can easily exploit with a few keystrokes, or by using third-party screen-capture software.

DRM solutions

In-house software solutions tend to be expensive to develop and easy for knowledgeable users to subvert. Many research firms have therefore experimented with the more robust security offered by digital rights management (DRM) software.

The idea behind DRM is to protect copyright and the exclusivity of information by limiting what people can do with it. The newest generation of DRM software allows companies to endow images and other information with policies that govern which individuals can view information and what they can do with it once they see it. Some DRM applications can prohibit users from printing or saving information, or can limit the number of times a user can open a specific file.


While DRM applications can protect companies against certain types of information theft, they are not ideal for protecting market research

surveys. First of all, DRM solutions require substantial administrative oversight. Most work by combining encryption technology (to protect information in transit) with a digital key system that authenticates and establishes usage restrictions for each user. Each instance of protection involves setting a usage policy that can vary from file to file and from user to user. This need to micromanage usage makes DRM solutions cumbersome for both the company deploying them and the end user who has to negotiate them in order to access protected information. The amount of effort required on both sides makes DRM solutions ill-suited to the task of protecting individual surveys online.

Secure Display

Other solutions for protecting information in online surveys involve technologies that can inherently prevent the duplication and misuse of data. These applications fall within the category of Secure Display solutions.

Unlike DRM software, watermarking, thumbnails, and other methods, Secure Display software applies general rules for protecting information before it is served to the Web. The best Secure Display solutions prevent users from copying, printing, saving, and screen capturing information displayed within a Web browser. Because the level of security does not vary according to end-user or by specific usage policy, Secure Display protection is easy to implement and maintain, and requires minimal involvement on behalf of the end-user.

Currently several firms employ Secure Display software to prevent online information theft. As more firms successfully implement security for their surveys, clients who commission online research studies are starting to demand a higher level of protection for their information. 

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Hispanic e-com

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like in the general market, most were not). What consumers really required was some serious guidance, to explain, illustrate, and support the process of selecting the items and then checking out and purchasing the items.

Several days following the completion of the research, DeCompras redesigned its site and later reported significant increases in completed sales

per visitor. Additionally, Decompras.com was acquired by ElSitio.com, a leading Latin American Internet portal.

Important to know

In addition to providing direction for improving the DeCompras site, the research uncovered three things that are important for all e-marketers to know about how to approach Hispanic consumers, particularly the large foreign-born segment.

The first major finding, which was consistent with findings from other Hispanic Internet research, was that Hispanic consumers are generally inexperienced with using the Internet and with computer culture in general. These consumers, who have not had the benefit of being raised with computers, are not only inexperienced on the Internet, but in some cases aren't comfortable with manipulating a mouse or using a keyboard.

Online Hispanic consumers are also less likely to be accustomed to the steps required in an e-commerce transaction. Common e-commerce site elements such as adjusting the quantities of items in the shopping carts or registering as a user of a site are not as obvious to these consumers.

In fact, the whole idea of shopping remotely rather than in-person is a relatively new concept to foreign-born consumers from Latin America, where historically the postal system has not been particularly reliable and credit card shopping has not been embraced. There is no culturally ingrained history of purchasing things from catalogs as there is in the U.S. (e.g., J. Crew, L.L. Bean, Sears, etc.).

Additionally, the use of computerese tends to throw some consumers off, even though the terms are in Spanish. Spanish-dominant consumers, who tend to be less tech-savvy in general, are not familiar with the terms in English or in Spanish. Since these consumers tend to be foreign-born, they have received little to no training and exposure to computers or the Internet in their countries of origin.

This is a lesson that packaged goods manufacturers have been learning all along. For example, Hispanic con-

sumers, eager to try new food preparation techniques, were trying a particular packaged baking product in droves, but were unsatisfied with their experience. It turned out that the product packaging failed to fully explain the process to consumers who did not have experience with a) baking their food and b) using a plastic bag to prepare their food. Through research, the company learned that Hispanic consumers were cooking the product in their frying pans, to disastrous results. The packaging was modified and the marketing efforts were adapted. The result: a more loyal consumer.

All this points to the need for e-marketers who are in the process of building brands with consumers in the Hispanic market to consider education as a main part of their strategy. Simply differentiating the brand itself isn't enough. As illustrated in the DeCompras research, consumers were interested and willing to purchase items, but became frustrated with the checking-out process and abandoned the sale in its final stages. This points to the need to inform and guide the consumer more explicitly throughout the process and do some category building in addition to brand building.

Focused on information

A second major finding was that Hispanic Internet users are more focused on the information value of a Web site than on its entertainment value. Hispanic consumers suffer from an information gap. There are relatively few sources of information about navigating everyday life in Spanish. The information-gathering process is more complicated for Spanish-dominant consumers. This was consistent with our findings on Hispanic consumers' reactions to advertising messages, which showed that Hispanics are more likely to rely on advertising for information and, for most categories, tend to prefer informational commercials rather than entertainment-oriented ones. Any Web site, regardless of its ultimate objective, will be better received by Hispanic users if it incorporates an informational element that speaks to this need among Hispanic consumers.

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We also learned that, in communications messages, Hispanics tend to be more focused on finding out the end benefit of a site (or service) rather than the more specific product features. They are less likely to judge a site positively or negatively in terms of its features. Their focus is much more on the end-use of the site — what it's for and what it does to improve the user's life.

In the DeCompras research, this was illustrated by consumers' extremely positive reactions to the statement: "DeCompras.com is a site that allows one to send packages to family in Mexico." The statement itself did not focus on product or service attributes (such as no delivery fee) but rather in the end result. While the actual shopping experience was confusing to them, they were overwhelmingly positive about the site concept.

This is similar to what we've found in the financial services area, where Hispanic consumers are much more motivated by hearing that a particular financial instrument is for buying a house or paying for a child's education than about its rate of return, interest rate, etc.

Regardless of their purpose, Web sites that stress that purpose and how it relates to the values of Hispanic users — in this case, the ability to maintain a closer connection to home — will be more appealing than sites that try to sell their features. This is not to say that features are not important, but only in the context of accomplishing the intended goal, i.e., sending gifts to family in Mexico, being informed about buying a new car, or finding more information about health care options.


Need for Spanish-language content

The last significant point uncovered in this research, and confirmed in other research, is that while there is an overabundance of quality content available in English, predominantly Spanish-dominant Hispanic consumers are still very much interested in obtaining information about products and services in Spanish. Most studies show that Hispanics online prefer existing English-language sites to existing Spanish-language sites, if forced to

choose. What the studies do not show is that consumers would rather get certain information in Spanish, if they could.

The language issues surface particularly in the retail arena as well as in other marketing environments. Spanish-dominant Hispanics, who would rather make a purchase with a salesperson who speaks Spanish, do not have many opportunities to do so, and are forced to make sometimes-important decisions in a language they are not comfortable with.

This phenomenon can help explain

the extraordinary success within the Hispanic community of certain door-to-door sales companies staffed with bilingual sales people. There is a huge opportunity to offer this customized Spanish-language exchange in an e-commerce environment as it offers something that most Spanish-dominant Hispanics could only dream of: a one-to-one dialogue with the seller in their most proficient language. This is not to say that there aren't certain obstacles to overcome, but knowing what the obstacles are is an important step in the right direction. 

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Survey Monitor

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matters for their customers by charging based upon the dollar size of the order or on the number of items in an order are making a mistake that may undermine the relationship that they're trying to build."

Key findings and forward-looking analysis from the latest Jupiter retail infrastructure research include:

-- According to a Jupiter Consumer Survey, 46 percent of consumers intuitively believe that shipping costs should be based on the weight of packages, while only 10 percent believe that price/order size should drive S&H costs. A Jupiter WebTrack Survey of the top 50 Media Metrix online retailers, however, reveals that 54 percent of retailers base shipping costs on order size, while only 30 percent base costs on weight.

-- Jupiter analysts have found that companies that charge on any basis other than weight risk either losing money or robbing their customers. For example, Pets.com went out of business because it subsidized the high costs of shipping pet food. On the other hand, Jupiter analysts cite CDNOW — which charges \$2.99 in S&H for the first CD and 99 cents for every additional CD — as a company that has used a dangerous per-item based pricing model. A purchase of 200 copies of Journey's Greatest Hits would cost a customer \$200 in S&H, while CDNow would only incur about \$28 in shipping cost.

-- A Jupiter Consumer Survey reveals that 73 percent of consumers evaluate the total price of products, including S&H, before making an online purchase. According to Jupiter analysts, companies that are profiting on S&H run the risk of increasing distrust among consumers.

"Across online retail and catalog, there is an even split between retailers that make money on S&H and those that lose money on S&H. As profitability becomes increasingly important, it is perfectly understandable that retailers would seek new sources of profit, including S&H charges," says Cassar. "However, the

long-term interest of the retailer is best served if its customers trust it. The latest Jupiter research shows that S&H is not perceived as a product — but as a necessary evil."

Turning money machines into marketing machines

There are opportunities for ATMs as delivery channels for advertising and coupon dispensing, according to a recent consumer research study by Synergistics Research Corp., Atlanta, entitled "Re-Inventing ATMs." The study, conducted in July of 2000, is based on a telephone survey of 1,002 consumers age 18 or older with household income of \$15,000 or more. Results reveal that almost half of the ATM users in the survey say it would be useful if ATMs dispensed coupons for discounts on general merchandise or services. Close to four in 10 ATM users respond positively to ATMs dispensing coupons for discounts on financial services. The survey also measured reaction to on-screen advertising at ATMs. One-third of the ATM users found on-screen ads for financial services useful. Advertising on the ATM for general merchandise and services is useful to one-fifth of the ATM users. In general, younger and lower-income ATM users are more likely to respond positively to advertising and coupon dispensing at ATMs. For more information contact Genie M. Driskill at 800-423-4229 or visit www.synergisticsresearch.com.

Workers preparing for layoffs

Although 73 percent of working adults feel secure in their current jobs, according to the February 2001 Xylo Report: Job Security Within the U.S. Workforce, more than half of the respondents (58 percent) are taking precautions to prepare for the possibility of layoffs in the midst of concerns that a recession may hit the U.S. economy in 2001.

The Xylo Report is a national survey on work/life issues conducted monthly by Wirthlin Worldwide for Xylo, Inc., a Bellevue, Wash., provider of Web-based work/life solutions used by companies to attract and retain employees. The company commissioned Wirthlin Worldwide, McLean, Va., to survey 1,006 U.S. adults during the period of February 2-5. Sixty-five percent of the 1,006 respondents qualified for this survey by being employed (margin of error was ± 3.9 percent, $n=647$).

The report provides insight into how the average American worker perceives the impact of a slowing economy and explores some of the mitigating factors that shaped their opinions. Nearly three-fourths (73 percent) of employees surveyed feel that their job is secure in light of talk about an economic slowdown and company layoffs, with more than half (56 percent) saying they feel very secure. While the survey found that working women are only slightly more inclined than working men to feel very secure about their jobs (58 percent and 54 percent, respectively), the results illustrated clear trends based on age and gender. Thirty-one percent of employees over the age of 55 feel insecure, while only 19 percent of those under 34 years old feel insecure. Based on gender, a staggering 42 percent of men over the age of 55 were concerned over losing their jobs, compared to only 19 percent of women over age 55.

Although the majority of workers feel a sense of job security, 58 percent of respondents are taking precautions for the possibility of layoffs. Improving personal finances topped the list, with 26 percent indicating that they are saving money. Fifteen percent are taking steps to improve their position in the job market by interviewing for other positions, going back to school for a degree, increasing skills through job training courses, working harder to increase job security, updating their resume, and looking at want ads. Eight percent are altering their finances by cutting personal expenses, investing money, paying off debts or taking a

second job.

Although a majority of the respondents were optimistic with respect to their job security, 34 percent believed they would be laid off or have their pay reduced if their company made staff reductions. One-fifth (20 percent) of workers believed they would be the individuals laid off if their company chose to make cuts, while 14 percent said they would be affected by pay cuts. Summaries of this and other Xylo Reports are available at www.xylo.com.

Couch potato-ettes?

It's not just men who love to watch TV sports. Women around the world are getting in on the act, too, according to research firm Ipsos-Reid. A survey of adult consumers in 34 countries reveals that 93 percent of men who watch TV tune in to sports. Among women, the number isn't all that far behind, at 83 percent. (This study looked at TV sports preferences only; a similar study will be repeated this summer with additional questions about sports participation and interest in sports around the world as a lead-in to next year's Olympics.)

What men and women are watching, however, is rather different. Men are attracted primarily to soccer, American football, car racing and boxing. Women are more likely than men to watch figure skating, tennis, gymnastics, athletics, volleyball and swimming, although some women are also tuning into soccer and American football. But both sexes share the same passion for baseball and basketball, as well as hockey and golf, the research found.

"While there are some sports that appear to have broached the gender divide, women and men in living rooms around the world may still be fighting over the remote when it comes to televised sports," says Melanie Dowe, a senior vice president with the company in San Francisco. "The fact that women prefer watching sports like figure skating, tennis and gymnastics may highlight the appeal of female role models in sport — something lacking in

the American football, car racing and boxing coverage preferred by men.

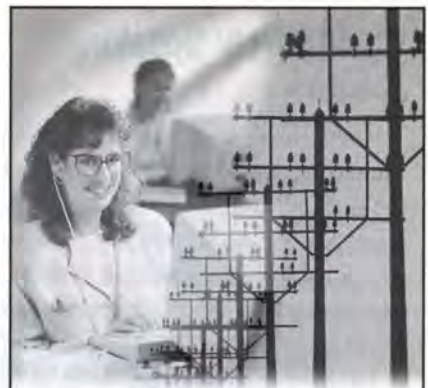
"The study also highlights the wealth of opportunity for advertisers to target both genders via televised sports coverage. Sporting events around the world have captured the attention of a vast majority of people. While baseball and basketball appeal to men and women alike, advertisers can accurately tailor their messages to specific audiences across a much wider variety of sports than ever before."

Overall, soccer reigns as the world's favorite TV sport, notes Ipsos-Reid in its quarterly study of international trends and opinions, *Global Express*. Soccer ranked highest in 24 of 34 countries and is especially popular in the urban markets of Brazil, Colombia, Saudi Arabia, and Thailand, as well as in Turkey and Egypt, where at least half of respondents named soccer as their top TV sports choice.

The greatest TV sports fans are in South Korea (96 percent are armchair athletes), urban China (95 percent), urban Russia (95 percent) and urban Thailand (95 percent). In urban Colombia, Germany and the United States, the figure is slightly lower at 91 percent.

In contrast, in Taiwan and Turkey one-third and one-quarter of adults respectively don't tune into television sports at all.

What's hot where soccer is not tops? Cricket is the favorite choice in urban India (watched by 64 percent of TV sports enthusiasts); basketball is tops in the Philippines (59 percent); baseball gets top mention among the Japanese (45 percent); swimming is the TV sport of choice in the Netherlands (34 percent); American football ranks highest among Americans (33 percent); figure skating tops the list in urban Russia (26 percent); ice hockey is favored by the Swedes (25 percent) and Canadians (23 percent); tennis (13 percent), rugby (11 percent), and soccer (10 percent) rate almost equally in terms of popularity among TV sports fans in Australia. For more information visit www.ipsos-reid.com.

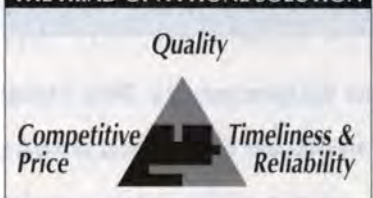


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Qualitatively Speaking

continued from p. 16

Now, I'm all for trying new things. I have on several occasions banished the dreaded and intimidating conference table set-up and replaced it with overstuffed chairs, couches, pillows, and beanbag chairs. This was done out of respect for our respondents and to enhance their comfort, not out of distrust of them.

Apparently this isn't enough. According to my trendy colleagues, friendship (a pre-approved f-word) groups are fine. The respondents know each other and are more relaxed in a familiar (home) environment. They keep each other honest.

However, in defense of qualitative research participants and their generous willingness to disclose information, I submit that there are several occasions in which consumers might be more comfortable (and more openly honest) with the sense of anonymity that comes with having

a group of so-called strangers meet in neutral territory (i.e., a focus group). For example, who wants to tell their group of friends about their experiences with incontinence or their shy 7-year-old son's bedwetting issues?

My experience has shown that consumers feel a sense of catharsis and relief when they can share their stories and concerns with strangers. It creates a bond that did not previously exist. They are more apt to build on each other's experiences as they learn and disclose together because they don't already know each other's habits and stories.

I'm not sure why people are fixated on respondent honesty as a flaw of focus groups. Maybe we blame consumers for our failure to truly understand and meet their needs. I do believe that consumers try their best to please us, and if they do provide inaccurate answers, it is only in their innocent attempt to give us information they simply may not have. Often,

such misleading answers may be the result of unfair, leading, or impossible questions ("Would you really pay more for it?"). Or maybe it's in our interpretation of their answers. Perhaps we oversimplify the consumer psyche. Maybe we don't really listen.

The way I see it, we as researchers are obliged to help keep them honest. Maybe we should have them place their right hand on the Bible and swear in when they sign the confidentiality agreement. Perhaps we could persuade moderators to be like Wonder Woman, who captured villainous liars with her truth lasso and made them come clean ("I would definitely not pay more for it, even though I just spent 45 minutes telling you how great your idea is.").

For what it's worth, here's my take on the trend: We need insights and information from consumers faster than ever before. We get frustrated when we miss the mark and our prototypes and concepts fall short of consumer delight. We might even be guilty of blaming them for our failures. Did they lie or did we not really listen to what they were trying to tell us? Focus groups do not measure behavior. They are not the place to assess purchase interest or the incremental volume potential of our new ideas.

But let's at least be honest with ourselves. Whether the participants know each other or not or meet in a conference room or a living room, a GROUP consisting of consumers FOCUSING on a topic is a focus group. The term might be generic, but I believe it's universal. Maybe my new friends and colleagues from New York are just tired of saying it. Maybe they're attempting to sound savvy by using new terms to define age-old practices. Maybe we'd be more hip if we called them "discussion groups" with a British accent.

If you want to hear more, you're welcome to come over for coffee. I'll invite a few friends. That way you'll know I mean what I'm saying. ☞

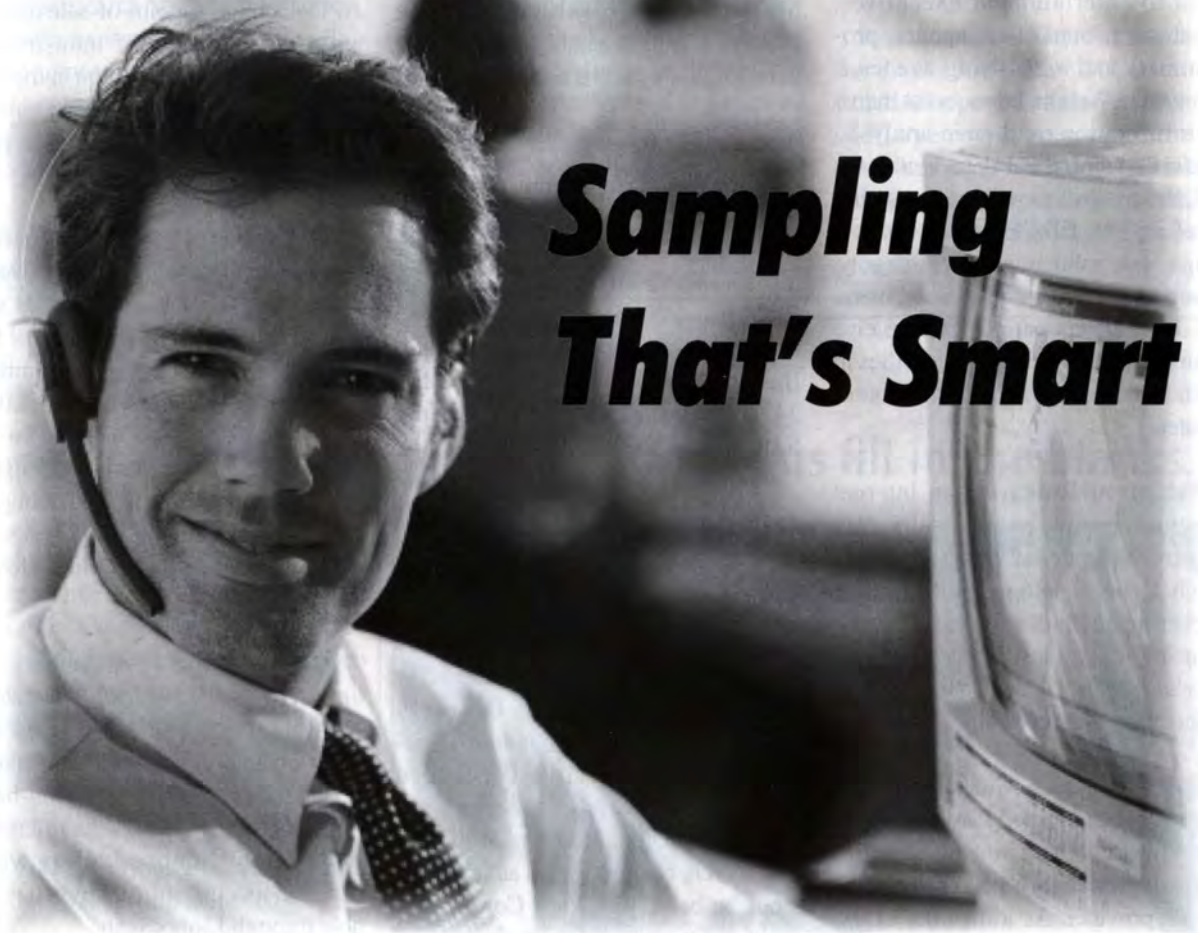
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Research Industry News

continued from p. 15

will provide syndicated research targeted to entertainment executives, researchers, marketers, agents, programmers and advertising agencies, giving them Web-based access to industry information, audience analysis, trends, and attitudinal data. Under the deal, the companies will work together to refine The EDGE user interface, design, data validation, panel integrity, survey content and needs assessment. The development partners will receive a number of custom research studies in addition to syndicated data at discounted rates.

WebSurveyResearch, an Internet survey company for the health care industry, has entered an agreement in which **Cyber Dialogue**, a New York marketing technology and services company, will exclusively use the company's WebSurveyMD panel for its online physician research.

Alchemedia, a San Francisco provider of security software, has joined the Alliance Program of Akamai Technologies, Inc., a content delivery service provider. As a member of the Akamai Alliance Program, Alchemedia will collaborate with Akamai to enable Alchemedia's Clever Content customers to utilize Akamai's globally distributed network and services for content delivery.

Association/organization news

The Council for Marketing and Opinion Research (CMOR), Port Jefferson, N.Y., announced that Diane K. Bowers, its founding president, is leaving to accept election as the full-time president of the **Council of American Survey Research Organizations (CASRO)**. Christine O. Adams has been selected as the interim president of CMOR. She is currently secretary of the board of CMOR. Adams recently retired after over 30 years with ACNielsen BASES. CMOR was founded nine years ago by four research industry associations: the Advertising Research Foundation

(ARF), the American Marketing Association (AMA), the Council of American Survey Research Organizations (CASRO), and the Marketing Research Association (MRA). The membership has grown to over 150 associations and companies.

Awards

Susan Taylor, founder of San Diego-based Taylor Research, has been named the Woman-Owned Small Business of the Year for 2001 by the U.S. Small Business Administration (SBA). The award was presented during the Small Business Week Awards banquet on May 24, co-sponsored by the SBA and the San Diego Regional Chamber of Commerce. The annual SBA awards program recognizes outstanding small businesses and their contributions.

The American Marketing Association gave its top Crystal award to research studies conducted for BindView by the **Quest Business Agency**, Houston. The annual competition honors marketing excellence among AMA members. Entries are judged on documented proof of success in research, marketing and advertising. Houston-based BindView Corporation offers software security products to IT professionals. The firm commissioned Quest to conduct blind, projectable quantitative research for two products among IT professionals nationwide.

Essman/Research, Des Moines, Iowa, has been selected as one of the top-rated focus facilities worldwide by moderators and researchers who participated in a survey conducted by the Impulse Research Corporation for the 2001 edition of the Impulse Survey of Focus Facilities.

New accounts/projects

The NPD Group, Inc., Port Washington, N.Y., signed 10 new retailers to its point-of-sale tracking panel in April and May. The new retail panel members include Autozone; Boscov; CSK Automotive; DaisyTek; Just for Feet; Meldisco, the licensed footwear division of Kmart; Pamida; Payless Shoe Source; Quill Corporation; and

Sephora. Each new retailer will provide NPD with detailed information on product movement throughout their stores. This information will in turn be used by NPD to enhance point-of-sale tracking reports for a range of industries. In return for their participation in the NPD panel, retailers will receive complimentary reports based on aggregated data from all retail participants.

Princeton, N.J.-based **Opinion Research Corporation** has signed database management contracts with governmental agencies in both the U.S. and the U.K. The value of the combined contracts is in excess of \$14 million over an initial period of three to four years. With options that could lengthen the duration of the United Kingdom work by an additional two years, the value of the contracts could substantially increase.

ACNielsen U.S., Schaumburg, Ill., and **Adams Business Research**, Norwalk, Conn., have expanded their multi-channel liquor sales information service, LiquorScan. Houston-based Spec's Liquor Warehouse has joined the portfolio of liquor retailers whose account-specific information is available through LiquorScan.

New companies/new locations

Market Insight has moved to 112 W. Foster Ave., Suite 202-C, State College, Pa., 16801. Phone 800-297-7710. Fax 814-234-7215.

Foy Conway, formerly CEO of Conway/Milliken & Associates, a Chicago research firm, has established a new creative marketing services firm, **Conway Creative Group LLC**, at 645 N. Michigan Avenue in Chicago. Additional information can be found at www.conwaycreative.com.

International Communications Research (ICR), Media, Pa., has signed a 10-year lease with Somerset Properties, Lower Gwynedd, Pa. The new build-to-suit office building will be located at 53 West Baltimore Pike in Media. The initial building will have 35,000 square feet in total and will serve

as ICR's headquarters.

MORPACE Pharma Group, Ltd., Concord, Mass., has established a new sales and research office near Princeton, N.J., with expanded capacity to serve the company's pharmaceutical and biotechnology clients. The office consolidates two smaller offices in Princeton and Doylestown, Pa.

Old Bridge, N.J.-based **Q Research Solutions, Inc.** has doubled its capacity by moving into a new 15,000-square-foot facility. The new facility includes 75 CATI stations, 10 central location testing rooms, a ventilation system for fragrance and flavor testing, and a focus group suite.

A new research firm, **Periscope Marketing**, has opened at 3450 Sacramento Street, #222, San Francisco, Calif., 94118. Phone 415-441-2744. Fax 415-409-1641. Web www.periscopemarketing.com. For more information contact Sara Edelman.

Company earnings reports

In 2000, Germany-based research firm the **GfK Group** achieved the best results in company history. Total revenue rose by 23.8 percent to Euro 480.9 million and is more than 10 percentage points above average growth rates in the last 10 years at 13.7 percent. EBIT amounts to Euro 39.4 million and consequently exceeds the figure of Euro 38 million forecast at the end of February. With the increase in the dividend from Euro 0.13 to 0.15, the total amount distributed rises from Euro 3.4 to 3.9 million. The increase in total revenue of Euro 92.3 million is 62 percent, attributable to the consolidation of subsidiaries for the first time. Adjusted, organic growth amounts to 9.1 percent.

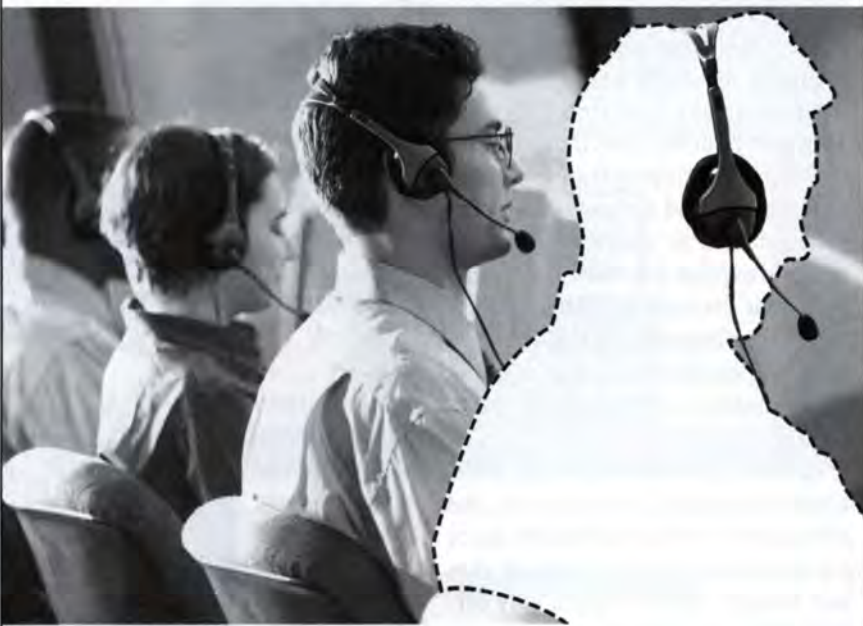
Total Research Corporation, Princeton, N.J., announced third-quarter and nine-month results for the period ended March 31. For its third fiscal quarter, the global marketing research firm reported record revenues of \$12,396,329, compared with \$10,273,085 for the same quarter of fis-

cal 2000, a 21 percent increase. Net income for the third fiscal quarter was \$421,372, or diluted earnings per share of \$0.03, compared with \$412,515, or diluted earnings per share of \$0.03, for the same quarter of fiscal 2000. For the nine-month period ended March 31, the company reported record revenues of \$39,507,566 compared with \$36,176,327 for the same nine-month period of fiscal 2000, a 9 percent increase. Net income for the nine-month period was \$1,542,142, or diluted earn-

ings per share of \$0.11, compared with \$1,668,282, or diluted earnings per share of \$0.12, for the same nine-month period of fiscal 2000.

In announcing financial results for fiscal year 2000, Cary, N.C., software firm **SAS** reported total revenue growth of 10.1 percent (16 percent before currency loss adjustment) to \$1.12 billion, marking the company's 24th consecutive year of double-digit percentage growth.

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continued from p. 21

wanted to study the usability of the current site. This study was intended to provide baselines against which the newly designed site could be compared. Of primary interest were measures of overall effectiveness of the site, including ease of use and appeal to the customer. Also of immediate interest was the detection of any technical problems currently existing on the site.

Eye tracking is particularly useful for identifying problem areas as individuals work through tasks on a site. In the eye-tracking paradigm, tasks are presented one at a time to a participant, who is free to ask questions if she or he does not understand what to do. No other verbalization is required, although participants are free to make any comments they wish. They carry out the tasks independently, without interruption from the experimenter and without being asked to describe either what they are thinking or to explain why they are making particular choices. As a result, their natural performance can be observed without possible influence from an experimenter's comments or questions.

In-depth interviewing brings additional information. It is here that the participant is asked to describe his or her reaction to a site, to point out likes and dislikes, and to explain why certain actions were taken.

Results of the study

Eye-tracking results

The primary foci of the eye-tracking analyses were the functionality and usability of the home page, because the home page was the critical point of initiation of all tasking. Failure to move from the home page to the appropriate next pages insured task failure for a participant regardless of the structure of the subsequent pages.

Three essential characteristics of a Web site are usability, visibility, and optimization. The eye-tracking analyses focused on measures of these three features.

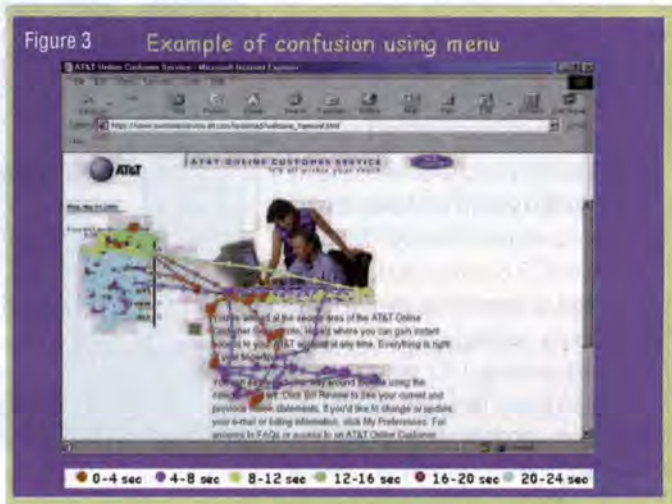
• Usability. Three measures of usability were determined: success on the task, time to succeed, and degree of confusion shown by the participants. The first of these is a common measure and needs no further elaboration. Success in this study was defined by reaching a pre-determined page in the Web site, depending upon the specific task being undertaken. The success rates for experienced and new users were 88 percent and 81 percent respectively.

The second measure of usability is important because it reveals whether a high success rate masks important problems. If individuals can succeed but require an inappropriate amount of time to do so, a site does not have good ease of use. For each given task in this study, the time required by participants to reach the criterion page was the basis of the measure. The average times to complete tasks successfully were 40 seconds for experienced users and 42 seconds for new users. These numbers are misleading, however, because of the large range over the tasks. Figure 2 shows the average times by task for the two groups.

The third essential measure of usability is based on the degree of confusion or hesitation that users display in trying to navigate around a Web site. If users find the site understandable and easy to use, they tend to navigate quickly and easily. If they

have difficulty understanding the logic of the site, they tend to have specific eye patterns that reveal this confusion.

Figure 3 shows an example of a user who is confused. On this task, the user is trying to decide which menu option is best. In the figure, each dot represents one observation in the individ-



ual's point of gaze. Adjacent dots were recorded 4 msec. apart. The colors indicate the sequence in which the observations were made. They occur in the following order: red, blue, yellow, green, purple, aqua — with each color representing 4 seconds of observations (i.e., there are 1,000 observations of each color).

In Figure 3, it is evident that the participant was in doubt about the menu selection because of the very large number of observations that occurred repeatedly in the same area of the menu. More than 20 seconds were consumed as he made his deci-

Figure 4 Example of little confusion using menu



sion.

In contrast, the eye movements of Figure 4 show little or no confusion. The participant moved immediately to the menu and selected the appropriate option in less than 5 seconds.

Confusion about the menu is revealed only in the eye movements. The two participants shown in Figures 3 and 4 made exactly the same number of mouse clicks for menu selection. However, the participant shown in Figure 3 took about 20 seconds longer than the participant in Figure 4 to make the decision to select the menu item, and he was focused on the menu for most of the time (the red and blue dots were early observations before he looked at the menu). The participant's uncertainty is revealed in the multiple back and forth movements across the various menu options.

In these data, confusion was considered absent if there were few back and forth movements and the response time fell between 2 and 8 seconds. Confusion was judged to be present if there were repeated back and forth movements in one location and the response time fell between 8 and 24 seconds.

The confusions were tallied by subject across all tasks and averaged over groups. The overall average level of confusion for experienced users was .63 and for new users was .52. A value of 1.0 would indicate that all users experienced confusion on all tasks; a value of 0 would indicate no confusions. The observed values indicate

overall success or time on task because it is entirely possible to perform a task successfully on a very unusable site. A site that is easy to use should have high rates of success, low times to completion, and very low rates of confusion.

- Visibility. A second mea-

sure derived from patterns of eye common tasks, more than half of all users — in both groups — showed high levels of confusion in using the menu.

It is important to consider the confusion index in addition to traditional measures such as

time on task. A site that is easy to use should have high rates of success, low times to completion, and very low rates of confusion. It is useful to determine if some regions are attracting too little attention while others are attracting too much. The two GazeStats in Figures 5 and 6 illustrate this point.

Figure 5 shows the average percentage of time spent by experienced users in a free scan of the Customer Service Home Page, and Figure 6 shows the same thing for the new

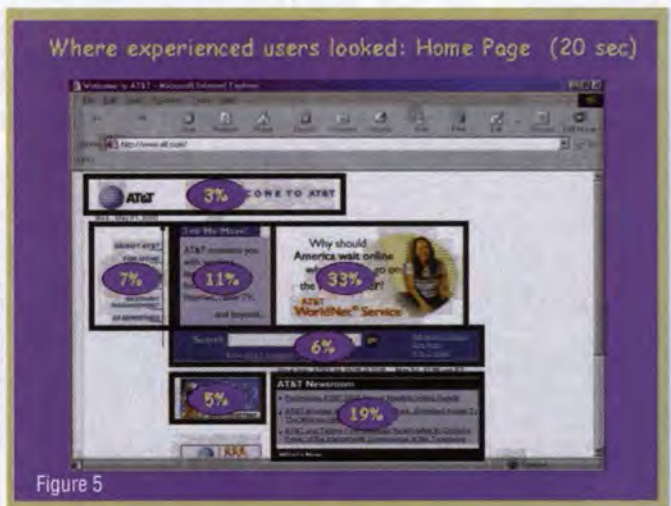


Figure 5

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users. Notice the large differences between these two groups of users in their free scan of the home page. The experienced users spent significantly more time on the menu items to the left (which are the key navigation tools on this page) and on the text box in the lower center. The attention of new users was captured by the AT&T logo and the picture in the center. The differences between the two groups on all regions are statistically significant.

- **Optimization.** A simple measure reveals the efficiency with which users are able to select items and make transactions efficiently: the number of non-page-changing extraneous menu items that are inspected (and then rejected). With optimal performance, a user will make few or no extra clicks on the menu items.

On an unfamiliar site, new users would be expected to make more extraneous clicks on menu items than experienced users, and this expectation was realized in the study. New users required an average of 22.8 clicks and experienced users registered an average of 17.7 total clicks for the nine common tasks. The optimal number of clicks for the set of nine common tasks is 10, indicating that both groups are well above the optimal number. (Note: This difference approaches but does not reach statistical significance because of the great range of clicks in each group and also because of the small sample size.)

It should be noted that these extraneous clicks provide information above and beyond the confusion data reported above and shown in Figures

3 and 4. The confusion data suggests that participants were looking again and again at the different menu titles, perhaps trying to understand what they were and how to differentiate among them. The extraneous links indicate a searching strategy and suggest that the users have not remembered correctly what the various category and subcategory menu items contain.

Interview results

The primary focus of the interviews was to ascertain why participants had trouble completing specific tasks, with special attention to features that

Having difficulty

Both success rate and confusion rate are high for experienced users, indicating that they can succeed in doing simple tasks but are having difficulty using the site. The high confusion rates suggest that wording or organization of the menu is unclear. One would expect confusion to drop with increased familiarity, but this is not the case. For the experienced users, confusion was highest toward the end of the study.

All regions of both home pages were noticed by most users. The text of the customer service home page captured quite a bit of attention, suggesting that important information placed here would be seen by both new and experienced users.

The large number of extra menu clicks and extraneous page links suggest that visitors are not using the site in optimal ways. The menu clicks may be caused by a number of factors, including failure to understand the categories, the absence of desirable categories, or the hierarchical structure of



the participants misunderstood.

During the eye-tracking session, an interviewer observed the participant through a one-way mirror. While monitoring the participant's eye movements, this interviewer also listened to any verbalizations and observed the participant's body language throughout the exercises. Notes were taken regarding tasks that appeared to be met with difficulty, so that these could be addressed in a debriefing interview with the participant.

In the debriefing interview, the participant was asked for general impressions of the Web site and was then probed about his or her impressions of certain tasks. The interviewer was able to follow up by asking the participants to review their thought processes during certain tasks and to explain their decision processes.

the categories.

The traversing of extra pages is probably related to misunderstandings about menu items. Users tended to click on a menu item, open a page, and then return immediately to the menu in order to select another item.

Corroborative results

The combination of eye tracking with in-depth interviewing produced strong corroborative results. Through this process we were able to verify that the aspects we interpreted as confusing were in fact confusing and we were able to understand why. This integration provided the research team with a richer interpretation than either technique alone. The result is a set of strong, detailed recommendations for site improvement that have both statistical and qualitative bases. ¹⁴

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Product & Service Update

continued from p. 12

SPSS Server 10.1 out

now

SPSS Server 10.1 — the server component of SPSS Distributed Analysis Architecture (DAA) — is now available for AIX from SPSS BI, a division of SPSS Inc., Chicago. DAA enables organizations to securely analyze massive data sets. Comprised of SPSS for Windows and SPSS Server, SPSS DAA provides users with a scalable, enterprise-level data analysis solution. SPSS for Windows — SPSS BI's modular, integrated desktop data analysis software — serves as the client interface, while SPSS Server manages access to and performs computations on the data. SPSS DAA enables users to analyze data sets faster by allowing large data sets to remain on the server and eliminating the need to copy and convert data. It also facilitates data access from many sources and enables administrators to maintain a high level of data security. For more information visit www.spss.com/spss10/spssserver10.

Guidebook for employee focus groups

Davis & Company, a River Edge, N.J., employee communications consulting firm, has introduced Working Wisdom: Capturing Employee Insights Through Focus Group Research, a 92-page guidebook designed to help professionals use focus groups to uncover the attitudes behind employees' viewpoints and turn this information into effective programs that help the company achieve its goals. A Web site, www.davisandco.com/focusgroup, contains excerpts from the book, a table of contents, and other details about the book, in addition to general information about employee focus groups.

New tracking system for CPG firms

FreedomPay, Inc., Wayne, Pa., devel-

opers of a network to enable cashless purchases coupled with consumer loyalty programs, has launched its FreedomPay MicroTrack CPG Marketing Suite, a tracking system designed to improve promotional efficiency and provide advanced marketing data for manufacturers in the consumer packaged goods (CPG) industry. The FreedomPay MicroTrack system tracks FreedomPay members' purchases at the point of sale and combines both behavioral and demographic information, allowing FreedomPay to develop targeted consumer promotions for its CPG customers. FreedomPay's network devices are attached to vending machines and cash registers to gather individual item movement. The MicroTrack system merges that information with profiles of individual FreedomPay members who use the network to make everyday cashless purchases. Tracking individual consumer buying behavior allows FreedomPay to conduct targeted marketing programs based on criteria pre-selected by the CPG manufacturers. For more information

visit www.freedompay.com or call 888-495-0222.

New version of DSS WorkBench

Customer Potential Management, East Peoria, Ill., has released version 3.0 of DSS WorkBench, its database analysis and query tool. The new software offers more user-friendly selection of variables to generate complex queries without having to know SQL (Structured Query Language). DSS WorkBench allows health care planners and marketers to analyze the information in their database for decision support. DSS WorkBench Version 3.0 adds a new restriction screen for more complex list exclusions. It also offers embedded reference tables that display choices for selection parameters. Other new features include integration with a mail list generator to produce mailing lists and control groups simultaneously with queries, and the ability to save query formulas for repeat use. CPM retained features such as geodemo-

graphic mapping capabilities, charting and graphing, data export, analytical processing and service utilization. Also included are standard and customized analytical reports and data filters for restricting data views for information pertinent to each task or goal. For more information visit www.cpm.com.

Conduct Web surveys in many languages

CustomerSat Inc., a Mountain View, Calif., research firm, has added enhanced multi-language capabilities in its Enterprise Customer Experience Management (eCEM) System 4, expanding users' ability to invite and manage feedback from a global, multi-language customer base. The new functionality allows users to create surveys in different languages and to include a single process to automatically deploy every aspect of the online survey process — e-mail invitations, online survey, reminder notices, etc. — in an unlimited number of different languages, including double-byte character languages such as Japanese, Chinese, and Korean. This feature allows a business to create one master survey, with automatic deployment of the e-mail invitation written in any combination of languages. The e-mail asks customers to provide feedback through an online survey, which appears to the customer in same language as the invitation. All subsequent communications are also generated in this language. For more information visit www.CustomerSat.com or call 800-372-7772.

Software updates from NetRaker

NetRaker Corporation, a Sunnyvale, Calif., research software firm, has released NetRaker Suite 3.1, an update of its customer evaluation application that delivers feedback on a Web site's ease of use, content, audience, and other business decision information. The NetRaker Suite 3.1 enhanced features include: NetRaker ResearchLogic, which provides con-

trol over the flow of research by allowing users to rotate blocks of questions and usability tasks, trigger questions based on responses and user actions, set up user quotas, and drive questions based on information stored in backend databases; NetRaker Cross Tabs, which helps users analyze the patterns in research data by identifying the similarities, trends, and distinctions between different groups; and NetRaker Filters, a new way to answer questions about customer attitudes and behavior patterns by filtering and sorting the research data based on common answers. For more information visit www.netraker.com.

IMS profiles leading pharm companies

IMS Health, a Westport, Conn., health care information firm, has announced online availability of Pharmaceutical Company Profiles (PCP), a database of information about 100 leading pharmaceutical companies worldwide. PCP provides analyses of each company's research and development pipeline, strategy, products and performance, as well as forecasts by financial and industry analysts. Annual interviews conducted with executives and professionals from the largest global pharmaceutical companies supplement information compiled from sources that include specialist publications, conferences, investment reports and IMS Health sales data. For more information visit www.imshealth.com.

Free update of StatPac

Minneapolis-based StatPac Inc. has announced a free update for StatPac for Windows, its survey software and analysis package. The new update offers an Internet survey system and graphics module. The new software features single and multiple-page Internet surveys, including the ability to send customized and serialized e-mail invitations to potential respondents asking for their participation. The software creates html Web pages complete with Java script to control

validity checking and branching. The researcher uploads the pages to their Web site, and responses are stored on their server until they're ready to be analyzed. The new graphics design module offers a large selection of presentation-quality charts, including traditional pie graphs, bar graphs, box and whisker plots, and scattergrams. Graphs can be included with the tabular reports or saved as .jpg files. The StatPac for Windows update is free to all users by calling 612-925-0159 or

visiting www.statpac.com.

School location databases from Spatial Insights

Spatial Insights, Inc., Vienna, Va., has released two extensively attributed databases of geocoded school locations: K to 12, comprised of elementary and secondary schools; and Higher Ed, which includes college and university locations. The data

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supplement existing information sourced from the U.S. Census and collectors of business statistics. Data for the more than 94,000 elementary and secondary schools were assembled from government surveys conducted annually. Among its more than 500 attributes, K to 12 includes student enrollment by grade, student-teacher ratio, and gender and ethnicity of the student population for each grade level. Specialty information provides the count of students eligible to receive free or reduced lunches plus migrant enrollment. Also compiled from information queried directly from the educational institutions, the Higher Ed dataset features over 9,800 colleges and universities nationwide. In addition to name and address fields, attributes include type of school (public, private, or nonprofit), number of years (four-year or two-year), and degrees offered, enrollment, and tuition fees. The K to 12 data are available for the 1998/1999 and 1997/1998 school years. The vintage of the Higher Ed data is 1997/1998. The data work directly with ARC/INFO, ArcView, MapInfo Professional, and are available in a number of industry standard formats, including .tab, .shp, and .dbf. Both datasets are GIS-ready. For more information visit www.spatialinsights.com/data/geodata/school.

Updated GIS software from ESRI

Redlands, Calif., GIS software firm ESRI has released ArcIMS 3.1, the newest version of its GIS and mapping software for the Internet. It is the first major update of the software since its initial release last year. The ArcGIS Desktop products (ArcView, ArcEditor, and ArcInfo) can now connect directly to the map and feature services provided by ArcIMS 3.1 and use ArcIMS as a data source in conjunction with other data types. With the release of ArcIMS 3.1, ESRI has internationalized the software; messages and menus have been placed into resource bundles for easy localization, and the software supports code pages for all languages for shapefiles and

database files. The firm is also shipping ArcGIS 8.1 Geostatistical Analyst, which provides a variety of tools for spatial data exploration, identification of data anomalies, statistical estimation, optimal surface creation, and evaluation of uncertainty in prediction surfaces. New analytical tools such as detrending using local polynomials, error modeling with kriging and cokriging, data transformations, and cross-validation model comparison allow optimal surface creation and analysis. Geostatistical Analyst provides a series of wizard dialog boxes containing analytical tools to assist the user in determining the values for the parameters specified. The product includes prediction, quantile, probability, prediction of standard errors, and standard error of indicators output maps. For more information, visit www.esri.com/arcims or call ESRI at 1-800-447-9778.

New resource for foodservice industry

The NPD Group, Inc., Port Washington, N.Y., has launched a new Web-based resource for the foodservice industry, NPDFoodworld. Through the new service NPD is collecting and delivering industry information online. The service offers secure access to market data and analysis updated monthly, including an enhanced version of NPD's CREST service. In addition to NPD market information, the service provides access to third-party links and feeds delivered via a personalized Website. For more information visit www.npd.com.

Briefly

KidzEyes.com, an online research panel from Chicago-based C&R Research Services, is now offering an omnibus service giving clients monthly access to 900 kids, six to 14 years of age. Clients can access data via a dedicated, password-protected reporting portal plus a downloadable data file. For more information contact Megan Burdick at 312-832-8775.

Nashville-based 20/20 Research, Inc. has added **online bulletin board and chat capabilities** to its list of qualitative research services.

Claritas UK and European sampling agency Sample Answers have launched a **European lifestyle database** for consumer market research. The database, SampleHome Europe, was developed in conjunction with Claritas UK and encompasses data from Claritas operations in the U.K., Germany, Holland, Spain, France and Italy.

Zurich-based electronic data collection firm Quask has launched a **Web-based research software system** called FormCaster. The software is available free from www.quask.com, and allows online survey forms to be created and tested by anyone with a PC. Once forms are created, Quask hosts the online survey, and handles data collection and analysis. The service is priced on a pay-per-use basis.

Business intelligence marketplace MarketResearch.com has released a new report, "**The U.S. Hair Care Market**," published by Packaged Facts. MarketResearch.com is also offering "**The Windows Report**," which examines the current trends in the windows product industry, "**The U.S. Fence Products Report**," produced by Specialist Business Information (SBI), and "**The U.S. Market for Gastrointestinal Products**."

Arbitron Inc., New York, has launched Webcast Audience Profile, a new **Webcast audience measurement service** which gathers audience demographics of individual streaming media channels. The service uses a pop-up survey on Webcasters' sites to gather demographic, socio-economic and Internet usage information. The survey does not interrupt the Webcast programming or content.

Albany, N.Y. research firm Colwell & Salmon Communications, Inc. has launched a new **Web survey product** to be hosted on the www.marketingservicesonline.net site.

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Names of Note

continued from p. 10

interim president and CEO. Sawyer will continue to serve on the Aegis board of directors.

Michael Kirsch has joined management consulting firm *Les Wood Associates*, North Andover, Ma., as vice president of research.

Research Corporation has named **James C. Burke** senior vice president and chief human resource officer.

Calabasas, Calif.-based *Informa Research Services, Inc.*, has named **John Packel** to head up business development for its Internet partner initiative.

Princeton, N.J.-based *Opinion Greenfield Online*, Wilton, Conn., has announced a new cus-

tommer-focused sales and services strategy and has promoted **Mara Shelby** to senior vice president and chief research officer to lead this new alignment. The custom research part of *Greenfield Online*'s business had been organized into separate sales and services departments. **Jason Levy** and **Marriott Dowden** have been promoted to vice president - custom research. **Meg Bachtel**, **Joan Barten-Kline**, and **Juli Schmidt** have been promoted to senior director - custom research. **Susan Shulman** has been named senior director - FieldSource. **Charlene Condy** has been named director - client partners. And **Jonathan Flatow** has changed titles to vice president - corporate development. He retains the position of general counsel and is a member of the operating committee.

Woodbury, Conn., research firm *Development II* has named **Sheldon Dill** director of sales and marketing.

Chandra Chaterji has been named senior vice president *Taylor Nelson Sofres Information Technology*, New York.

Lisa Simpson has been named research project coordinator at *Essman/Research*, Des Moines, Iowa.

Rossella Clark has joined *Clark Marketing Research Group*, Rocky Hill, Conn., as vice president.

Elizabeth J. Slimmon has been named research associate at *Dialogue Resource, Inc.*, Fairfield, Conn.

Thomas Bang has been named president of the *TVG Marketing Research & Consulting* business unit of *TVG, Inc.*, Fort Washington.

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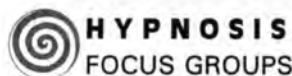
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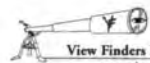
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trying to understand how the Web site fits in. They are realizing it isn't a separate marketing strategy. It needs to be integrated into everything else they do."

Keep them happy

Wydra, who is also a member of the Interactive Marketing Research Organization, is confident that the industry is taking steps to keep online research respondents happy and avoid alienating them. "I think we're trying, and our clients are onboard with us on this, to make sure the respondent understands that we appreciate them, that we guarantee their privacy. We have to keep things very short, keep surveys as interesting as possible, and don't over-survey."


The other good news on the consumer front is that in general, people seem to be growing more at ease with releasing their personal information into cyberspace. A Market Facts Interactive study found that 56.9 percent of respondents are "comfortable" or "somewhat comfortable" providing credit card information over the Internet, versus 43.5 percent by telephone. The numbers for disclosing other personal data (health, family history and income) are comparable, with 40.1 of respondents "comfortable" or "somewhat comfortable" divulging such information online, versus 32.7 percent for telephone.

The most feared outcome of providing personal infor-

mation online is identity theft but in reality, spam is probably a more realistic, if less damaging, threat. Seventy-five percent of survey respondents said they are still concerned about receiving spam, and 74.5 percent are still concerned about their info being shared in an unauthorized manner.

As a result, they are very vigilant in protecting themselves and their information. In the survey, nearly 70 percent said they at least sometimes look at a Web site's privacy statement. And 60 percent said a privacy statement makes them feel more confident that their personal information won't be shared in ways they don't want it to be. "With everyone supposedly short on time these days you wouldn't expect that people would spend time reading privacy statements but they are," Wydra says. "So it's important for companies to understand the impact of the privacy statement and to make sure their site is secure and that it has a tag that says it's secure. These are very important to getting people to do e-commerce at those sites."

Long-term relationship

While the Internet still strikes fear into some hearts, for the most part, consumers have settled into a long-term relationship with it. "Eighty-one percent agree that the benefits outweigh the drawbacks," Wydra says. "There is no doubt that the Internet is a tool that people are embracing, one that saves them time and that there are benefits to using. Despite the fact that the hype has come down a bit, people are still pretty favorable about it." 

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Trade Talk

By Joseph Rydholm, QMRR editor

An Internet comfort zone?

One term you don't often hear associated with the Internet is stability. Things are settling down a bit now as it becomes clear again that profits DO matter and that millions in venture capital do not a viable business make. But in its brief but eventful life, the Internet has come to symbolize upheaval and transience.

Even the stodgy old research industry has undergone a bit of an Internet-led makeover, though we're finding out that while slow-and-steady may not always win the race, at least it's unlikely to explode in a fireball half a mile from the finish line.

The research equivalent of old-economy companies are now welcoming back clients who have realized that it's probably not a good idea to do research all by yourself just because you can, and that there is more to a research firm than just the ability to post an online survey. Turns out those long-standing research companies may have been exhibiting prudence — not blinkered stubbornness — when they urged a cautious approach to the new medium. True, they certainly rushed their own online capabilities to market (can't be left behind!) but they had a research foundation — rather than just venture capital — to build upon.

"We have seen a lot of clients get burned," says Donna Wydra, vice president and managing director of Market Facts Interactive, a division of Market Facts, an Arlington Heights, Ill.-based research stalwart. "The online environment has allowed a lot research companies who aren't really researchers to get up and running and people who have used those companies have come back to us and said 'We got bad data. We want to do it

right this time.'

"It's not enough to just throw up a Web site and have some technology behind you. You need to have research knowledge and a skill set and you need to have a viable sample source. It requires more of an investment than was originally thought, and those who could not make that investment have fallen out."

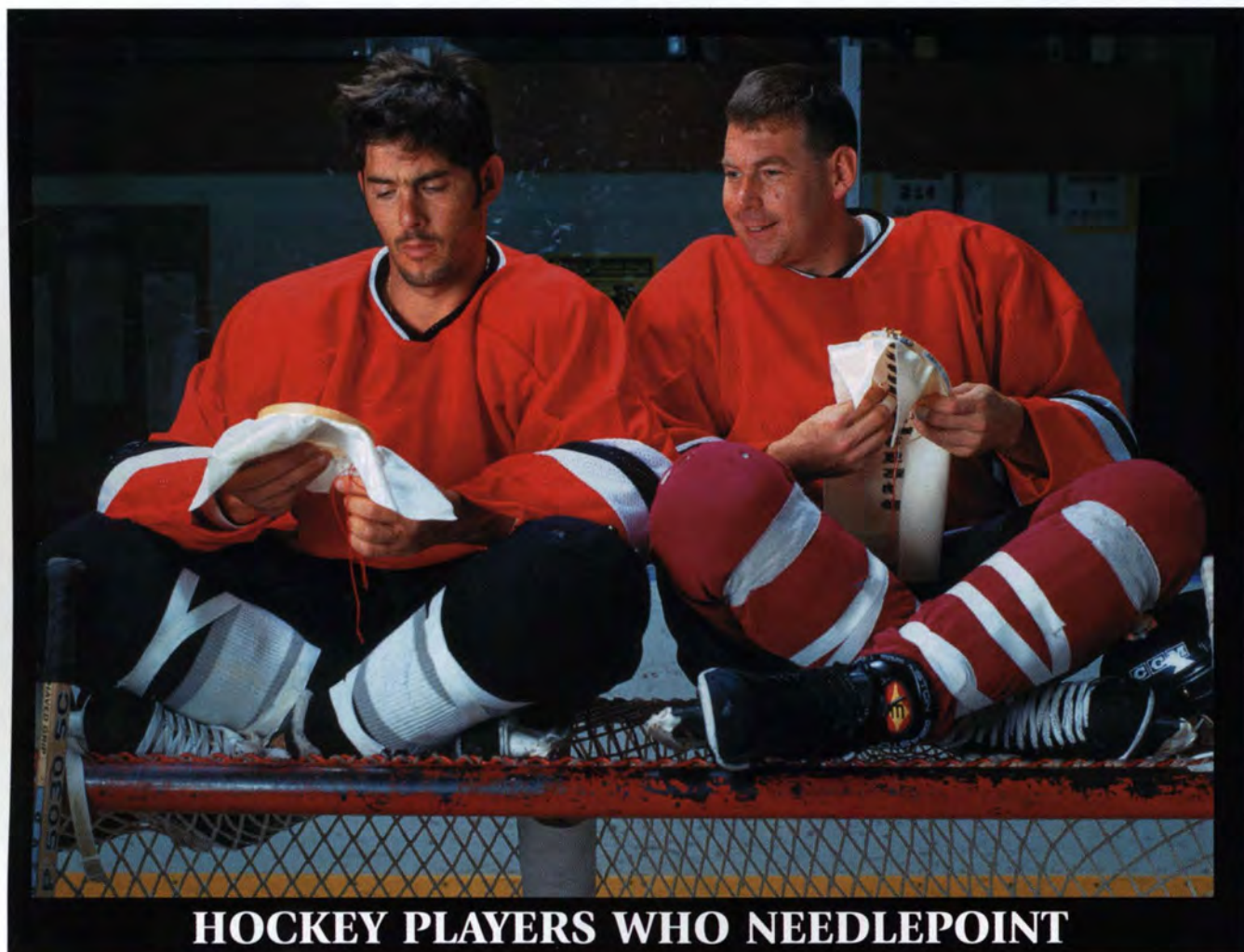
Online research is cheaper, but it's not a fraction of the cost of traditional offline research, Wydra says. "The mantra two years ago was, 'It's cheap and it's fast.' We are moving beyond that. I think people are understanding that you get what you pay for."

Two varieties

At this juncture, online research refers to two kinds of research: research conducted *on* the Internet, and research conducted *about* it. "One category is still tactical, looking at the online environment as a data collection method," Wydra says. "Beyond concept testing, you can conduct A&U studies, segmentation work, conjoint analysis — a lot of the more strategic work that people were afraid to do online. Now that the sample source has been pretty much validated, people are branching out and doing other kinds of work."

Web site research is now all the rage as companies try to determine just what, if anything, their sites are doing for them, Wydra says. "Is it functioning properly? Can people find what they want? For companies that aren't just online firms, it's a matter of finding out how their Web presence interacts with their offline activities and really

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