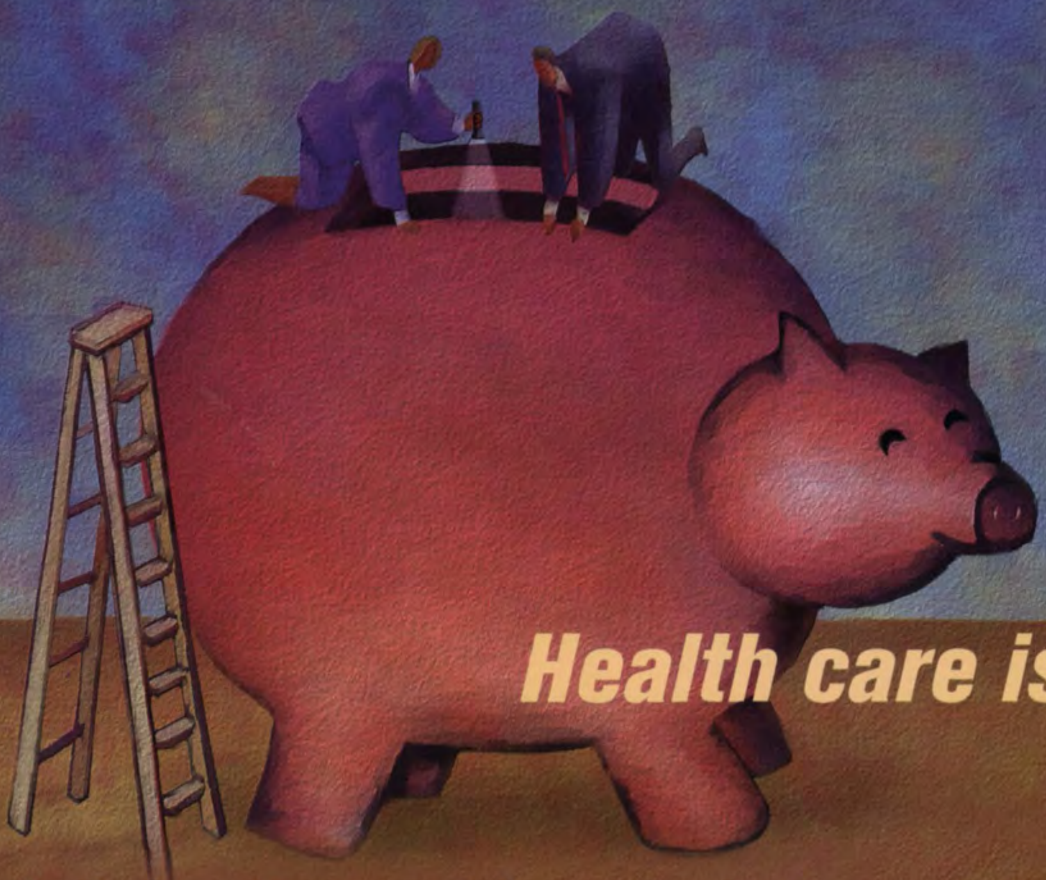
QUIRK'S Marketing Research Review

www.quirks.com

June 2002

Qualitative research issue

- Online laddering: climbing up to dig down
- Moen gets showered with findings
- Estimating show-up rates



Health care issue

2002 Omnibus Directory

THIS KID HAS A MIND OF HIS OWN...

...AND WE'VE GOT THOUSANDS LIKE HIM ONLINE!

Need to get plugged-into what kids have to say?

The KidzEyes.com™ online children's research panel can give you amazing insight into what thousands of 6-to-14 year-olds nationwide are thinking. Whether you want to conduct a custom, full-scale study or ask only a few questions in our monthly omnibus, KidzEyes can provide you with a fresh, kids-eye view on topics ranging from advertising, promotions, packaging, concept and pilot testing, Web site evaluations, trend tracking and more. And you can rest easy knowing that every KidzEyes panelist has been pre-screened and permissioned in full compliance with the Children's Online Privacy Protection Act.

KidzEyes.com -- the latest creative research solution from C&R Research Services.

KidzEyes.com™

See the world through KidzEyes!

For more information, visit us at www.crresearch.com, email us at Info@Kidzeyes.com, or call us at 1-800-KIDZEYES.

QUIRK'S Marketing Research Review

Volume XVI, Number 6 June 2002

CONTENTS

FEATURES

Case Histories

22 A healthy site
University of Michigan Medical Center turns to usability testing to fine-tune an informational Web site on colorectal cancer

24 The Revolution is at hand
Moen designs new showerhead after ethnographic research uncovers host of innovation opportunities

Techniques

26 No-shows? No problem
Estimating show rates for focus groups

34 Implication or recommendation?
When working with qualitative research findings, is one more valuable than the other?

40 Climbing up to drill down
Research on new financial services product shows that laddering can be conducted online

48 Compare and contrast
Combining online and traditional methods to enhance qualitative studies

52 The value of market data: does the Internet change everything?

56 Diversify your market share
Pharmaceutical companies should incorporate ethnic marketing into their business strategy

62 Using neural networks to analyze surveys
Part I: an introduction

Columns

16 Data Use
A walk through discriminant analysis

20 War Stories
True-life tales in marketing research

20 Qualitatively Speaking
Online focus groups...here today, not gone tomorrow

122 Supplier Side
Telephone data collection part 2: outsource it or do it yourself?

Publisher
Tom Quirk

Associate Publisher
Evan Tweed

Editor
Joseph Rydholm

Production Manager
James Quirk

Directory Manager
Steve Quirk

Marketing Manager
Dan Quirk

Advertising Sales
Evan Tweed 952-854-5101
Lane E. Weiss 415-461-1404

Quirk's Marketing Research Review, (ISSN 08937451) is issued 11 times per year – Jan., Feb., Mar., Apr., May, June, July/Aug., Sep., Oct., Nov., Dec. – by Quirk Enterprises, Inc., 8030 Cedar Ave., Ste. 229, Bloomington, MN 55425. Mailing address: P.O. Box 23536, Minneapolis, MN 55423. Tel.: 952-854-5101; Fax: 952-854-8191; E-mail: info@quirks.com; Web address: www.quirks.com. Periodicals postage paid at Minneapolis, MN and additional mailing offices.

Subscription Information: U.S. annual rate (11 issues) $70; Canada and Mexico rate $100 (U.S. funds); international rate $119 (U.S. funds). U.S. single copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change. **POSTMASTER**: Please send change of address to QMRR, P.O. Box 23536, Minneapolis, MN 55423.

Quirk's Marketing Research Review is not responsible for claims made in advertisements.

Editorial policy: We invite submission of manuscripts from outside sources. Write or call for guidelines. Send press releases and other editorial material to Joseph Rydholm, editor (joe@quirks.com). We reserve the right to edit any manuscript.

Reprints: For information on article reprints, please contact FosteReprints at 866-879-9144 or at order@fostereprints.com or visit www.fostereprints.com.

DEPARTMENTS

8 Survey Monitor
10 Names of Note
12 Product & Service Update
14 Research Industry News
93 Moderator MarketPlace
99 2002 Omnibus Research Directory
118 Index of Advertisers
120 Classified Ads/Sales Offices


Ingredient

'Cyberchondriacs' number 110 million nationwide

E-health (the use of the Internet related to health and health care) continues to grow, and a recent national survey finds that 110 million adults sometimes go online to look for health care information. Rochester, N.Y., research firm Harris Interactive calls them "cyberchondriacs." On average, they search the Web for this type of information three times a month, searching mainly

through portals or search engines rather than by going directly to particular sites.

These are the results of The Harris Poll, a nationwide survey of 707 adults (18+) who are online from home, office, school, library, or some other location. Surveys were administered by telephone between March 13 and 19, 2002.

Other findings of this survey include:

• 80 percent of all adults who are online (i.e., 53 percent of all adults) sometimes use the Internet to look for health care information. However, only 18 percent say they do this "often," while most do so "sometimes" (35 percent), or "hardly ever" (27 percent).

• This 80 percent of all those online amounts to 110 million cyberchondriacs nationwide. This compares with 54 million in 1998, 69 million in 1999 and 97 million last year.

• On average those who ever look for health care information online do so three times every month.

• A slender 53 percent majority of those who look for health care information do so using a portal or search engine which allows them to search for the health information they want across many different Web sites. About a quarter (26 percent) go directly to a site that focuses only on health-related topics and one in eight (12 percent) goes first to a general site that focuses on many topics that may have a section on health issues.

Those who go online for health information tend to be younger (which fits the profile of frequent Internet users), and they are better educated and more affluent than the general population. These cyberchondriacs include 82 percent of people aged 18 to 29, 84 percent of those with postgraduate education and 77 percent of people with household incomes of over $75,000.

The data shows that the Internet continues to be used by huge, and growing, numbers of the public interested in getting information about particular dis-

continued on p. 76

Online magazines gather dust, not readers

Fast and free online magazines are not enough for Americans to sacrifice the convenience associated with traditional paper magazines. According to a survey by InsightExpress, a Stamford, Conn., market research firm, Americans still demand that they be able to take their magazines to bed, into the bathroom, or on their commute. Publishers waiting for readers to change and opt for online over traditional paper magazines may be wasting their time.

Today, less than one in three individuals (32 percent) read any magazines online. Readers cite inconvenience (54 percent); dislike of online banner ads, pop-ups, and general distractions (47 percent); prices of online magazines (43 percent); and eye strain (23 percent) as the main reasons for staying away from online magazines.

Readers so prefer traditional to online that, of those people who regularly read online magazines, only 22 percent actually prefer reading magazines online — while 73 percent expressed that they would not forgo their paper magazine for an online alternative — even for half the price. In fact, while a majority of respondents (63 percent) currently pay for a traditional magazine subscription, nearly 80 percent expect online magazines to be free.

"Given that resources remain scarce, publishers would be better served to cut their losses when it comes to online and focus on their readers' overwhelming preference: high-quality paper magazines," says Lee Smith, COO of InsightExpress.

It was not all bad news for online publications — readers do believe that online provides more timely content (59 percent) — however, only 22 percent perceive that online magazines provide higher quality content than their print versions.

"Though online magazines have an advantage in that they can deliver real-time news and information, they don't stand a chance when competing for a reader's undivided attention," says Smith. "Online is not the magic bullet publishers were hoping for to retain readership." For more information visit www.insightexpress.com.

Julie P. Power, co-founder of *J.D. Power and Associates*, died April 11 following a long fight with multiple sclerosis.

Universal Studios Hollywood has named **Brian Pope** vice president, brand marketing and marketing services. His responsibilities will include oversight of market research and Internet marketing.

Todd Sloan has been named chief financial officer of *NetRatings, Inc.*, Milpitas, Calif., replacing **Jack R. Lazar**, who is leaving to spend more time with his family and pursue other personal and professional interests. Separately, the board of directors of NetRatings has elected **John Dimling** as the new chairman of the board. He will replace **David Norman**, who has decided to retire from the board.

Mike Fisher has joined St. Louis-based *Maritz Research* as account manager for its hospitality research group. He is based in Oak Brook, Ill.

Mark Waller has been named executive vice president, consumer strategy and marketing at *Diageo*. Waller, currently president of Diageo's central in-market regional office in Chicago, will lead the process that will bring together Diageo's business and consumer strategy, marketing and advertising, and external affairs functions. **Ted Hissey**, senior vice president, market support, will report to Waller and will continue to provide support to Diageo's six regional in-market companies.

Amplitude Research, Inc., Birmingham, Mich., has named **Suzanne Goodney** director of client services.

CMR, a New York provider of strategic advertising and marketing communications, has added **Jack Bedell** and **Suzie E. Ross** to Precision Marketing Services, its division that specializes in marketing and research advisory services and new product development. Bedell has been named senior vice president of business development and Ross has been named vice president of operations.

New York-based information firm *Reuters* has named **Sean Bauld** senior vice president of marketing insight, responsible for global market research across Reuters.

Baltimore Research, Towson, Md., has named **Ted Donnelly** director of research.


Donnelly


McGregor

Dallas research firm *Service Strategies International* has promoted **Kathi McGregor** to president.

Irwin Bank and Trust Company, Irwin, Pa., has promoted **Robert G. Michaud** to assistant vice president/marketing. Michaud will be responsible for the bank's marketing operations including advertising, MCIF (marketing customer information file), market research, and strategic planning.

Taylor Nelson Sofres (TNS) has named **Trevor Richards** managing director, Taylor Nelson Sofres Australia.

Lindsey P. Draves has been named general manager of *Multimedia Audience Research Systems* (MARS), New York.

St. Louis-based *Marketeam Associates/Doane Marketing Research, Inc.*, has promoted **Dennis Block** to chief operating officer.

New York brand consultancy *The Interbrand Corporation* has named **Dave Nemiah** group director, research.

Marlene Holm has been promoted to senior project manager at *Market Decisions Corporation*, Portland, Ore. In addition, **Amy Ferrero** has been promoted to lead quality assurance monitor.

The NPD Group, Inc., Port Washington, N.Y., has named **Edward J. McBride** to the newly-created position of president NPD Chicago/general manager, NPDFoodworld. He will also represent the Chicago branch on NPD's executive committee. The current NDPFoodworld management team of **Bob O'Brien**, president, NPDFoodworld; **Harry Balzer**, vice president, The NPD Group's Food Consulting Services; and **Dave Jenkins**, vice president, National Eating Trends, will remain in place. They will report to McBride.

Discovery Research Group, Salt Lake City, has announced several promotions and new hires. Promotions in Salt Lake City: **Mary Spain** to vice president of client services, **Kathy Rasmussen** to director of project management, and **Wendy Beesley** to project director. In Price, Utah: **Carole Wright** to director of call center operations. In Washington, D.C.: **Kristie Rupper** to account executive. New hires in Salt Lake City: **David Carr** has been named chief information officer; **Lisa Winward**, director of marketing and special projects; **Keith Pettit**, systems administrator; **Garrick Hart**, project director; and **Cathy Smith**, project director. Other additions: **Jamie Ohler**, account executive, New York; **Simon Groner**, account executive, Scottsdale, Ariz.; **Sanserrae Frazier**, on-site project manager and account executive, Cincinnati.

Market Trends Research, Seattle, has named **Gene Starr** project manager for the consumer goods division.

Encino, Calif.-based *E-Poll* has named **Tim Kennedy** director of sales.

Introducing Net-MR 2.0

The world's most advanced tools for market research management

Net-MR is an Internet-based software platform for market research management. Designed for professional market researchers, Net-MR is:

End-to-end
By bringing together project leaders, suppliers, research clients and respondents under a single platform, Net-MR provides a complete solution for market research.

Integrated
Net-MR integrates data from all sources into one central database, allowing mix-mode and multi-country studies to be completed more efficiently than ever before.

Real-time
Net-MR provides powerful real-time reporting, allowing any authorized project managers or external clients to monitor progress, analyze interim results, and take action without delay.

Global
Net-MR is available in 35 languages and provides affordable access to a panel of respondents from more than 180 countries.

Project Management

Questionnaire Design
Translation Management
Sample Management
Project Accounting
Quota Monitoring

Panel Management

Panelist Registration
Profile Management
Customer Service
Respondent Portal

Data Collection

Net-Survey
Net-CAPI
Net-CATI
Net-Focus
Net-DB

Analysis and Reporting

Analyzer Suite
Report Publisher
Data Processing Engine
Client Portal Manager
Open-End Coding

GLOBAL MARKET INSITE

E-BUSINESS SOLUTIONS FOR GLOBAL MARKET RESEARCH

GMI

FOR MORE INFORMATION PLEASE CONTACT INFO@GMI-MR.COM
OR VISIT US ON THE WEB AT WWW.GMI-MR.COM.

Product & Service Update

Focus group findings delivered on CD-ROM

Poole Consulting, a San Ramon, Calif., research firm, has launched FocusView, a multimedia product that gives subscribers findings from focus groups with respondents in selected target markets. Subscribers customize their own questions and then see and hear what their target market is thinking through the delivery of the results on CD-ROM Media Kits. The Media Kits combine text, video, and the voice of the customer. Subscribers receive a full presentation report with video clips of the discussions, an executive summary and an appendix with their custom information. FocusView conducts a series of qualitative research sessions through the year (spring, fall, winter). Each session consists of five focus groups across major U.S. markets for a total of 15 focus groups in each subscription. Focus group discussions relate to buying behavior, desires, problems, needs, and hot topics. Based on these sessions, FocusView Media Kits are developed. The Media Kits also provide speaker notes to help subscribers present the information to others within their company. For more information visit www.focusview.net or contact Dorothy Poole at 925-560-0937.

Track and analyze shoppers' paths

WhereNet Corp., Santa Clara, Calif., has formed a strategic alliance with Sorensen Associates, a Troutdale, Ore., research firm, to provide tracking applications for consumer packaged goods retailers and manufacturers. Using WhereNet's wireless Real-Time Locating System (RTLS), Sorensen has developed the PathTracker system to electronically track and analyze the paths and behaviors of shoppers.

The PathTracker shopper monitor and merchandising system uses the RTLS infrastructure installed in retail stores to capture data about consumers' shopping patterns from the point they enter the store to checkout. By analyzing shoppers' traffic patterns and time elapsed in certain aisles or in front of specific point-of-purchase displays, store managers and consumer product manufacturers have access to data to make decisions about how to best merchandise their products and increase sales.

The PathTracker system features active radio-frequency WhereTags mounted on shopping carts and baskets, WhereNet antennas inside the store that receive transmissions from the WhereTags every few seconds, and WhereNet visibility software that receives the location information from the antennas. The system uses this information to calculate and record in the database the shoppers' specific locations as they walk through the store. By integrating data of a shopper's "trail" with the positional coordinates of all products in the store and product purchases from checkout scanners, the PathTracker post-processing statistical methods yield research in the form of tables, charts, and graphs. For more information visit www.sorensen-associates.com or call 503-665-0123.

CPM expands health care index

Customer Potential Management (CPM), an East Peoria, Ill., CRM firm has expanded its predictive health care index to provide health care executives comprehensive customer information and predictive market segmentation to help identify health care needs in specific geographic areas, industries, or medical specialties. By building a database in-house of 260 million U.S. individuals and 112 million households, CPM can now offer market lists that are selected by its proprietary CHUI segmentation system. CHUI stands for Consumer Healthcare Utilization Index. The index provides a relative ranking, a number between 0-999 to indicate an individual's propensity to use specific health care services. The higher the score, the greater the likelihood the individual would need the service in the category selected. CHUI offers more than 200 scores in three medical areas: based on medical diagnostic codes (MDC); the top-identified diseases and procedures of the 21st century and ICD-9 codes; and diagnostic related groups (DRGs).

CHUI scores can be applied to lists by region and specialty, allowing providers, payers, device manufacturers and pharmaceutical companies to select only certain segments based on desired score ranges for more strategic disease management, service utilization, campaigns, and long-term planning. For more information visit www.cpm.com.

Handheld survey system from Perseus

Perseus Development Corporation, a Braintree, Mass., research software firm, has released Perseus MobileForms, a new mobile information collection software system. MobileForms is designed to help organizations with their entire mobile data management process: form creation, deployment to Palm devices, results collection, and reporting and analysis. With MobileForms, survey forms are deployed on a handheld device, eliminating the need for paper-based surveys. Form creation is done using Perseus SurveySolutions' word processing interface. The forms are transferred to the handheld device using the wireless Internet library or one-touch wire-based hot sync. Responses are collected and stored on the handheld device and transferred through wireless or wire-based connections to either an Internet SQL database or a desktop

continued on p. 84

Research Industry News

Research Calendar

The Marketing Research Association (MRA) will hold its annual conference on June 5-7 at the JW Marriott in Washington, D.C. For more information visit www.mra-net.org.

The American Marketing Association (AMA) will hold its school of marketing research techniques on June 9-14 at the University of Notre Dame, South Bend, Ind. For more information visit www.marketingpower.com.

The European Society for Opinion and Marketing Research (ESOMAR) and the Advertising Research Foundation (ARF) will hold a "Week of Audience Measurement" on June 9-14 in Cannes, France. For more information visit www.esomar.nl.

Frost & Sullivan will hold its Advanced Marketing Research Asia Conference & Exhibition on June 10-12 in Singapore. For more information visit http://summits.frost.com/MRA.

Canada's Professional Marketing Research Society (PMRS) will hold its annual conference on June 12-14 at the Nottawasaga Inn, Alliston, Ontario. For more information visit www.pmrs-aprm.com.

The European Pharmaceutical Marketing Research Association (EphMRA) will hold its annual conference on June 24-28 at the Sheraton Hotel and Towers in Brussels. For more information visit www.ephmra.org.

Target Marketing of Santa Barbara will hold its "E-metrics Summit," a forum on determining how to answer e-metrics questions, on June 25-26 at the Four Seasons Biltmore, Santa Barbara, Calif. For more information visit www.TargetingEmetrics.com.

Redlands, Calif.-based GIS software firm ESRI will hold its annual user conference on July 8-12 at the San Diego Convention Center. The conference is open only to ESRI software users. For more information visit www.esri.com/events/uc.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its annual congress on September 22-25 in Barcelona. For more information visit www.esomar.nl.

The American Marketing Association (AMA) will hold its annual market research conference on September 8-11 at the Hyatt Regency, Chicago. For more information visit www.marketingpower.com.

Frost & Sullivan will hold its fifth annual Advanced Marketing Research Executive Summit, East, on September 22-26 in Orlando, Fla. For more information visit http://summits.frost.com/MRT.

News notes

Arbitron Inc., New York, has released an initial round of ratings results from the second phase of the Portable People Meter (PPM) U.S. market trial in Philadelphia. Compared to existing methods of measuring media audiences, the Portable People Meter continues to report higher average quarter-hour audiences on a 24-hour day, total-week basis for the combined electronic media stations and networks that encoded full-time. The February 2002 PPM results show increased average quarter-hour audiences for broadcast and cable television, and somewhat higher average quarter-hour audiences for radio.

The findings from the early weeks of the expanded panel of 1,500 consumers in the Philadelphia radio and television market confirm the pattern of observations reported in the previous three ratings comparisons from last year's more limited phase of the trial in Wilmington, Del. These findings continue to suggest that Arbitron's new ratings technology is tracking media exposure that is not included in today's generation of TV and radio ratings methods.

Nielsen Media Research, which has an option to join Arbitron in the commercial deployment of the Portable People Meter in the United States, will participate in an expanded evaluation of the PPM results and will assist Arbitron in its analysis of the differences between the PPM trial results and Nielsen's reported audience measurement data in Philadelphia.

Millennium Research Inc., Apple Valley, Minn., recently celebrated its fifth year in business.

Survey Sampling, Fairfield, Conn., has awarded over $175,000 in prize money so far this year to winning survey respondents who completed SurveySpot and e-LITe online surveys.

Acquisitions

The Ipsos Group, Paris, has acquired the assets of ACNielsen's U.S.-based strategic marketing research and product development consultancy, **ACNielsen Vantis.** Upon completion of the sale, the company will be known as Ipsos-Novaction & Vantis.

Greenwich, Conn.-based **NFO WorldGroup** has acquired **FYI Worldwide**, a provider of new product volume forecasts. The new firm will be known as NFO FYI. Terms of the acquisition were not disclosed. FYI

News spotlight

British research industry weathers downturn

The latest figures on the U.K. market research industry, released by the British Market Research Association (BMRA), show that the industry is riding out the recent economic downturn better than other sectors.

The industry is now worth £1.15 billion, and the revenues of BMRA-member companies grew by 7.1 percent in 2001, up from £1.07 billion in 2000. Although this increase is smaller than the 9.3 percent growth posted the year before, it still outstrips inflation. And other elements of the marketing mix, such as advertising, have had one of their worst years for a long time as expenditure has dried up.

Revenues of the 10 largest companies, which represent 74 percent of sales, grew by 6.5 percent. Domestic U.K. sales grew by 7.4 percent, a slightly higher rate than that for international sales, which increased by 6.3 percent.

The U.K. industry slowdown is reflected in Europe, where European countries reported lower growth in 2001 than in 2000. It is anticipated that, Europe-wide, 2002 will post only a 2 percent to 3 percent growth rate in research sales.

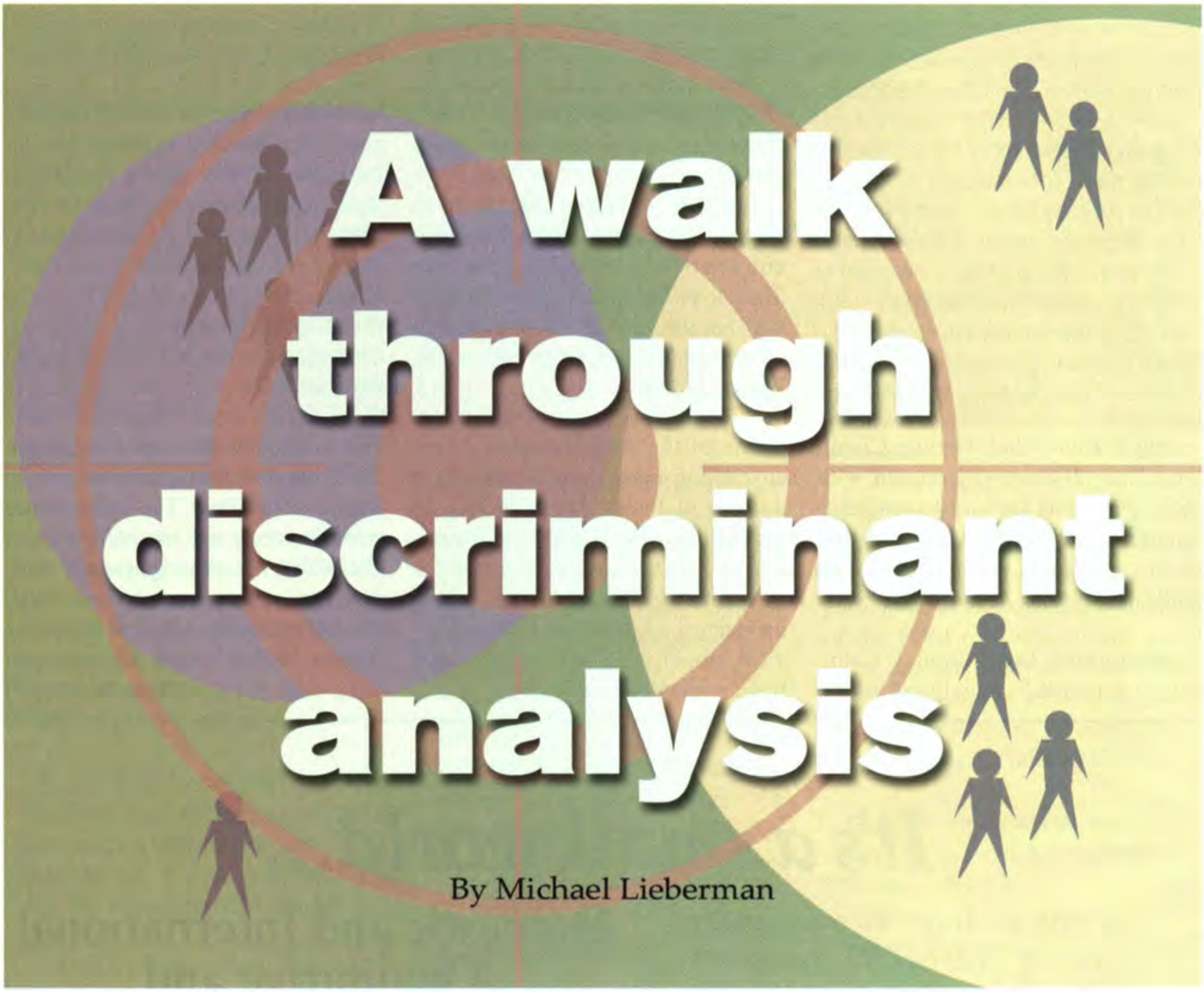
"The industry overall is showing the kind of growth we would expect, and in fact is showing better returns than other marketing disciplines, such as advertising, which has been one of the worst hit industries in the downturn," says Ivor Stocker, BMRA chairman.

"In the current climate, we need to exercise caution where forecasting is concerned. Prospects are somewhat tight, particularly compared to one year ago. However, we can sound a note of cautious confidence and optimism, as we expect to benefit from the progressive renewal in business confidence, both here in Europe and in the USA."

partners Ken Sobel, George Ciardi, and Dave Bieber will remain with NFO FYI. The firm will stay headquartered in Wilton, Conn., with a western regional office in Fountain Hills, Ariz.

NetRatings, Inc., Milpitas, Calif., has acquired substantially all of the assets of the **AdRelevance** online advertising expenditure measurement division of Jupiter Media Metrix for \$8.5 million. The terms of the transaction include the immediate transfer of substantially all AdRelevance assets, including the AdRelevance suite of services, employees, historical data, client base, and an array of patent applications, trademarks, and copyrights. NetRatings will also assume certain identified liabilities. The AdRelevance product family will be sold alongside the Nielsen//NetRatings suite of audience measurement services. Will Hodgman, the former president of the Jupiter Media Metrix Measurement

continued on p. 70



A walk through discriminant analysis

By Michael Lieberman

Editor's note: Michael Lieberman is founder and president of Multivariate Solutions, a New York consulting firm. He can be reached at 212-656-1711 or at michael@mvsolution.com.

Recently, after conducting a successful market segmentation for a client (we were able to identify high-likelihood customers who are price-insensitive), my client phoned me. "Michael," he said, "my client loves the segments. He wants to be able to run that banner point in the next study. Is there a way to add a few questions to the survey and come up with the classifications?"

"Yes," I answered. "What you need is a discriminant analysis."

At first glance this is not what my client requested. He wants to identify people, not classify them. What, then, was he asking for?

What my client's client wanted to do, in essence, was to discriminate between segment members and non-segment members. Once identified, segment members will be used in a future banner for analysis in the next study.

Discriminant analysis is used in situations where you want to build a predictive model of group membership based on observed data — characteristics, attitudes, demographic attributes, etc. The analysis produces a linear equation of variables that can be used to explain which attribute best discriminates between the two groups and, as an extension, build a powerful predictive model for future classification.

Sometimes clients confuse discriminant analysis with cluster analysis. In fact, they are conceptually similar. However, one uses cluster analysis to form groups. Discriminant flows in the opposite direction: You have the groups, you want to know why.

Basics of discriminant analysis

Discriminant analysis is an *a priori* technique. That is, you have the groups defined before you begin. Multiple discriminant analysis, from which discriminant maps are drawn,

continued on p. 88

War Stories

True-life tales in marketing research

By Art Shulman

Editor's note: War Stories is a semi-regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. Send your own tales of research-related wackiness to him at artshulman@aol.com.

Ron Sellers of Ellison Research supplies some information to illustrate how hectic market research can sometimes be. One of his moderating colleagues (who'll remain nameless for obvious reasons) once scheduled groups for a Tuesday in Chicago and a Thursday in New York. The fellow showed up at the facility right on time that Tuesday evening...in New York. He had gotten his wires crossed and reversed the entire trip, but hadn't figured it out until the facility wanted to know why he was two days early.

Sellers also tells about one of his clients who decided to discontinue using a moderator after the client received a fully itemized travel bill that included limousine, body massage, and full spa treatment.

That's outrageous, right? What!? We don't deserve that? Sure we do! We market researchers live hard lives and deserve cushy treatment to keep our brains alert!

In moderating a set of creative groups in Phoenix for a branding agency, Sellers encountered the ultimate paranoid respondent. The groups were getting pretty rowdy as Sellers was going through various creative exercises. One guy became increasingly uncomfortable with the noise level and the frenetic pace, complaining a couple of times and generally making the rest of the group really uneasy.

Finally, he lost his patience and accused Sellers of not conducting marketing research at all. Rather, he claimed that the "focus group" was actually a bizarre psychological experiment in which people watched from the back room to see how he would react to stress.

"I want to leave," the man said. Sellers tried to calm him down by assuring him he really was doing marketing research, but he also told the guy he was free to leave if he wanted. The man rocked back and forth in his chair a few times with his arms folded and a scowl on his face. He finally revealed where his heart was really at when he asked, "Do I still get my 60 bucks?"

David Howell of The Howell Research Group was conducting a focus group among bus riders group for the Regional Transportation District, Denver Metro's public transportation agency. As the participants, recruited a couple of weeks earlier, entered the focus group room, he noticed a man in an upper-body cast with one broken arm in a rigid brace that extended out from his body cast, and scrapes and bruises on his face.

As Howell went around and did the intros, he asked the man how he had become injured. The man indicated that a couple of days before the focus group, he had fallen off a bus while attempting to board it — at 1:00 a.m. while traveling from Shotgun Willies (one of Denver's infamous strip bars) to a local bar near his home.

The client was happy to hear that public transit was serving a public safety purpose by keeping this guy out of his car. However, this did not lead to the Regional Transportation District using the respondent as a spokesman in its advertising.

Robert B. Fox of Genactis tells about a focus group respondent he once encountered. "Marty" was in his upper 70s and had an old-world Eastern European accent. With a few minutes to go in the group, he asked, "Are we almost done? I gotta make a sissy." (For those who need a translation, Marty meant he needed to urinate.) He was told the group was about to end, and when it did end a few minutes later, Marty searched behind him for his cane, but he didn't see it. The female moderator asked, "Marty, can I help you?"

Still thinking of his earlier comment, Marty replied, "Nah. I can find my own zipper."

In spite of having to go to the bathroom, Marty took a moment to tell Fox a dirty joke as he was getting ready to leave. But Fox didn't see fit to report the joke to this columnist. Ah well, the editor would probably have deleted it anyway. *(True, but I'd still like to hear the joke! – Ed.)*

In future issues, we'll report on more quirky, loopy, and strange happenings in the world of market research. If you'd like your story to be told — anything related to research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires — please e-mail me at artshulman@aol.com.

Qualitatively Speaking

Online focus groups...here today, not gone tomorrow

By Amy Yoffie

Editor's note: Amy J. Yoffie is vice president and general manager of LiveWorld Research Services. She can be reached at 908-232-2723 or at ayoffie@liveworld.com.

So here is my question: What was the initial reaction from clients and market research vendors when they were told that telephone data collection was a viable alternative to door-to-door interviewing?

Do you think they decided they didn't like this new methodology because they couldn't see the respondent's face if the interview was conducted over the phone? Or did they say they tried telephone interviewing once, didn't like it, and therefore were not going to use it again? Or perhaps they expressed concern that people were not used to talking on the phone for as long as a survey takes. Or maybe they said they were not making the switch because their clients weren't requesting they do so.

I am asking because these are exactly the objections that I encounter when I recommend conducting online focus groups. Even though online groups have been available for at least seven years, there is still a vehement prejudice against this methodology, and the reasons are the ones noted above: they can't see the faces of the respondents; they had one bad experience that soured them "forever;" participants can't adapt to the new technology; and their clients aren't asking for it anyway.

Seeing the faces

I am sympathetic to the concern about losing facial expressions, although I think their importance is greatly exaggerated. Whenever we observe people in a traditional group, we are interpreting what their facial expressions mean. Anyone who has lived in different parts of the country knows that regional differences alone make such interpretations risky and often wrong.

My favorite example is former President Bill Clinton. He smiled all the time; it didn't mean a thing. And while one can compensate to some extent by becoming knowledgeable about different regions of the county, people move around so much that it is often hard to know where people are from and how to interpret what their facial expressions mean.

Similarly, skeptics ask: "What about non-verbal cues?" There are ways to compensate for them online. In fact, the very act of having to type their responses forces participants to be more expressive in words to get their points across. Furthermore, the use of emoticons (smiley faces, frowns, etc.), shorthand (e.g., typing "LOL" for "laughing out loud:), capitalization, and punctuation enables participants to get their points across quite well.

Bad experiences

Negative opinions about online focus groups are rooted in misconceptions about how online groups work. There are generally two stereotypes: either they are free-for-all sessions that veer out of control and provide useless information, or they are staid, boring events that are, as one prospective client recently told me, "like watching paint dry." Of course, most of the people who tell me this have never actually attended an online

continued on p. 92

University of Michigan Medical Center turns to usability testing to fine-tune an informational Web site on colorectal cancer

Editor's note: Debra Power is co-owner of Moore Power Marketing, an Ann Arbor, Mich., research firm. She can be reached at 800-324-3216 or at debra@moorepowermarketing.com. Mack T. Ruffin is associate professor, Department of Family Medicine, University of Michigan. Michael D. Fetters is assistant professor, Department of Family Medicine, University of Michigan. *The authors wish to thank the HealthMedia Research Laboratory at the University of Michigan for reproduction of sample Web pages.*

Usability testing is one of the most valuable tools for assessing the effectiveness of a Web site. However, many unique challenges arise when testing the usability and content of a health-related Web site. During the course of a recent project, we worked to develop a methodology that provides both qualitative and quantitative data. Using this methodology we were able to measure the effectiveness of the content, navigation, and usability of the Web site. While these methods may not be applicable for all health care Web site testing, we believe the underlying principles could be applied in a wide range of circumstances.

Attitudes and perceptions

In May 2001, Moore Power Marketing completed a series of 10 focus groups for the University of Michigan Medical Center. The groups centered on attitudes and perceptions towards colorectal cancer, with a secondary goal of gathering information for the development of a Web site about colorectal cancer (see "Rewriting the rules," *Quirk's*, December 2001). The focus groups were Phase 1 of a three-part project. Phase 2, which we will discuss here, consisted of 30 in-depth interviews about the Web site, while Phase 3 will evaluate the effectiveness of the Web site as an intervention tool for users.

In order to maintain consistency, the segmentation of the in-depth interviews closely matched that of the focus groups. Interviews were conducted in urban, semi-urban, and semi-rural areas, with mixed genders and ethnicities. Further, participants were required to be between the ages of 50-70 and unscreened for colorectal cancer. Each of these requirements helped us formulate, and in some ways dictated, the final procedures for the in-depth interviews.

Half of those recruited for this phase of the study had participated in the focus groups. This was done in order to measure the effectiveness of the implementation (the Web site) of the data gathered during the focus groups. The other half of the recruits provided fresh insight without having learned significant background information about the disease during the focus groups.

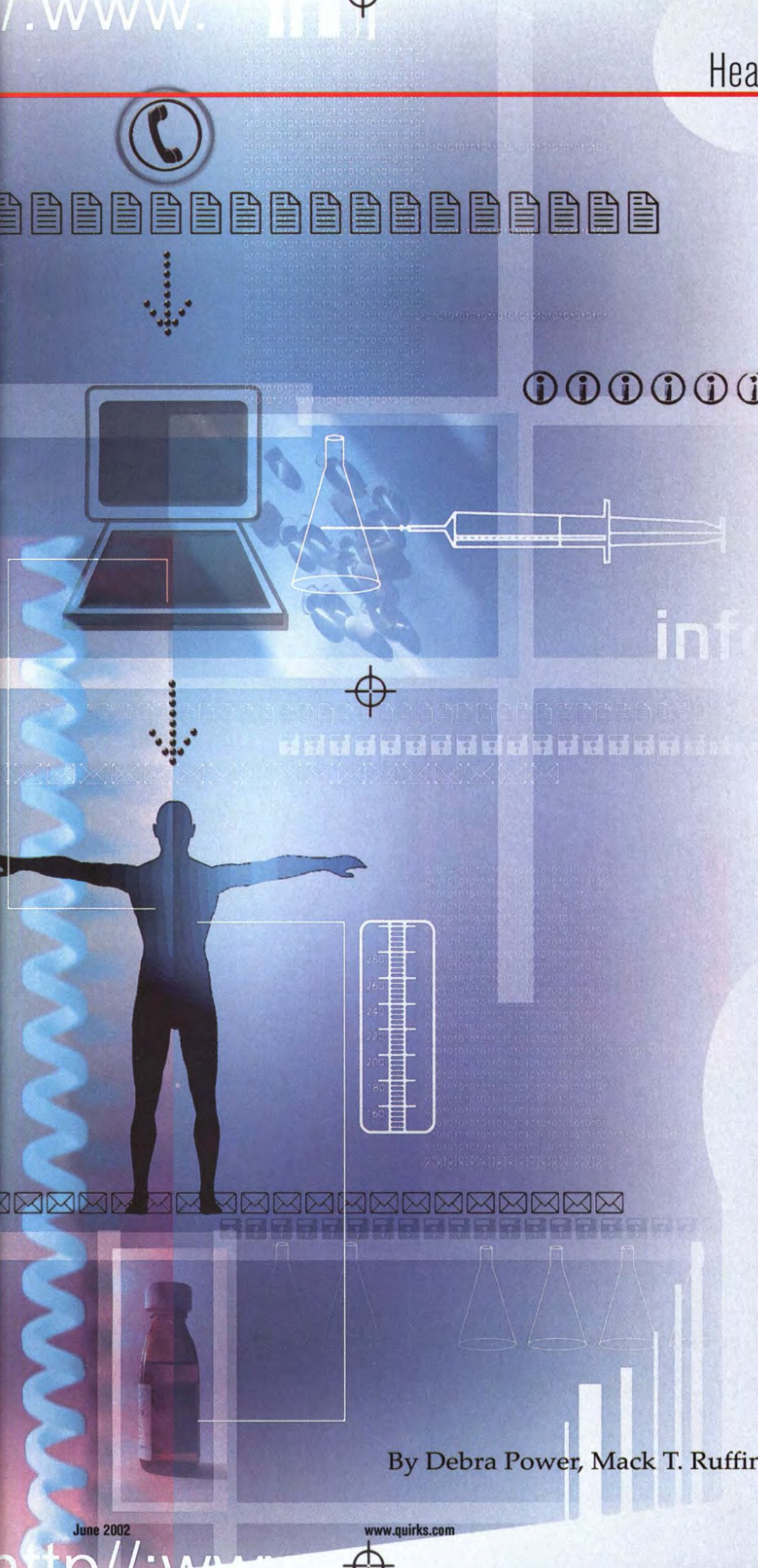
During the in-depth interviews, participants reviewed a Web site focused on the available tests for colorectal cancer and evaluated the usability, content, and navigability of the site. The goal of the site was to educate the user and provide a starting point from which they could begin further inquiry with their physician. The interviewer looked for detailed reactions to particular aspects of the Web site, recorded responses, and video/audiotaped the interviews.

Screening for Internet use

To conduct Web site usability testing the participants must be able to use the Internet. While this may seem obvious, measuring a potential participant's competency in this area can be difficult. The audience for this Web site is adults ages 50-70, those most at risk for colorectal cancer. According to an U.S. Census Bureau Current Population Study (August 2000) older adults have the lowest percentage of Internet use. In their study, 31 percent of adults 55-64 used the Internet at home, while those 65 or older were at 13 percent. We were concerned that in order to determine the effectiveness of the Web site we should recruit potential users who used the Internet frequently, as well as the less frequent user.

To recruit Internet users we included a question in the screener to gauge relative Internet usage competency. It read: "During the interview you will be asked to use a computer to review a Web site. Are you comfortable using a computer,

continued on p. 78



A healthy site

By Debra Power, Mack T. Ruffin, and Michael D. Fetters

The Revolution is at hand

MOEN designs new showerhead after ethnographic research uncovers host of innovation opportunities

By Joseph Rydholm
QMRR editor

The shower is many things to many people. For some, it's their own personal Lincoln Center, with an audience of one (perhaps two if you count the cat). For others, it's a day spa, even if that "day" lasts only as long as it takes to lather up, rinse off, and towel down. But we all pretty much seek the same experience: a chance to get clean, to wake up a bit, and maybe massage a sore neck or shoulder — all without sustaining life-threatening injuries.

Trouble is, most showerheads don't do much to help us reach our goal. Their slippery dials are hard to adjust; the water either pelts you painfully or dribbles on you weakly; and that soothing flow never seems to hit just the right spot in just the right way.

Plumbing product maker Moen had long suspected that the showerhead market was an area of opportunity. But while the North Olmsted, Ohio company knew a lot about what a plumber was looking for in a fixture, it needed to increase its understanding of consumer behavior in order to seize that opportunity. "We were looking for the big idea but we felt that our discovery had to go back to basics," says Jack Suvak, Moen's director, marketing research. "We wanted to get a better understanding of consumers' motivations in use of the shower. To start with, we had to understand behavior. Because the obvious isn't always apparent. And a lot of the aspects of things that are really most important to us tend to be hidden because they are either simple or too familiar to us. So we wanted to spend a little more time at discovery, taking time to look at the same things most people see or do but think about them in a different way."

Moen conducted depth interviews, in-aisle research, and even interviewed hydrotherapists to understand the beneficial effects of water on the body. But some of the most interesting findings came from ethnographic research in which consumers were observed showering in their own homes.

Only natural

When developing a new product, it's only natural to consider watching consumers use existing products as a way to uncover unmet needs. But does that reasoning apply to shower fixtures? Moen decided yes. "You aren't going to launch a product and not spend some time trying to understand how people use the products in the marketplace today. I think there were things we had to consider, but in the long run, we thought that the best place to start was to do observational research. We had done some of it before, and this project raised obvious challenges, but we felt we clearly wanted to do discovery work in the context of the shower. That was key for us," Suvak says.

"We wanted to get at it from the consumer's perspective without them having to express what they were doing. If I were to ask someone, 'How do you shower?' they might give me maybe 30 percent of what they do. If I were to take them to a facility and have them shower they might give me 40 percent — it's not their shower, after all. But if I can do observation in their own home I'm going to get maybe 70 percent of what they do, and that gives you a much richer understanding of what's going on."

Big idea

The goal of the research was to find the big idea, the "wow." It could be something that solves a problem in a unique way, or a thoughtful execution of an idea that hasn't been thoughtfully executed in the past. "Depending on which of those you are looking for, you are going to employ different kinds of research to get that information," Suvak says. "You are going to fish a little bit deeper if you are trying to find the 'wows.'"

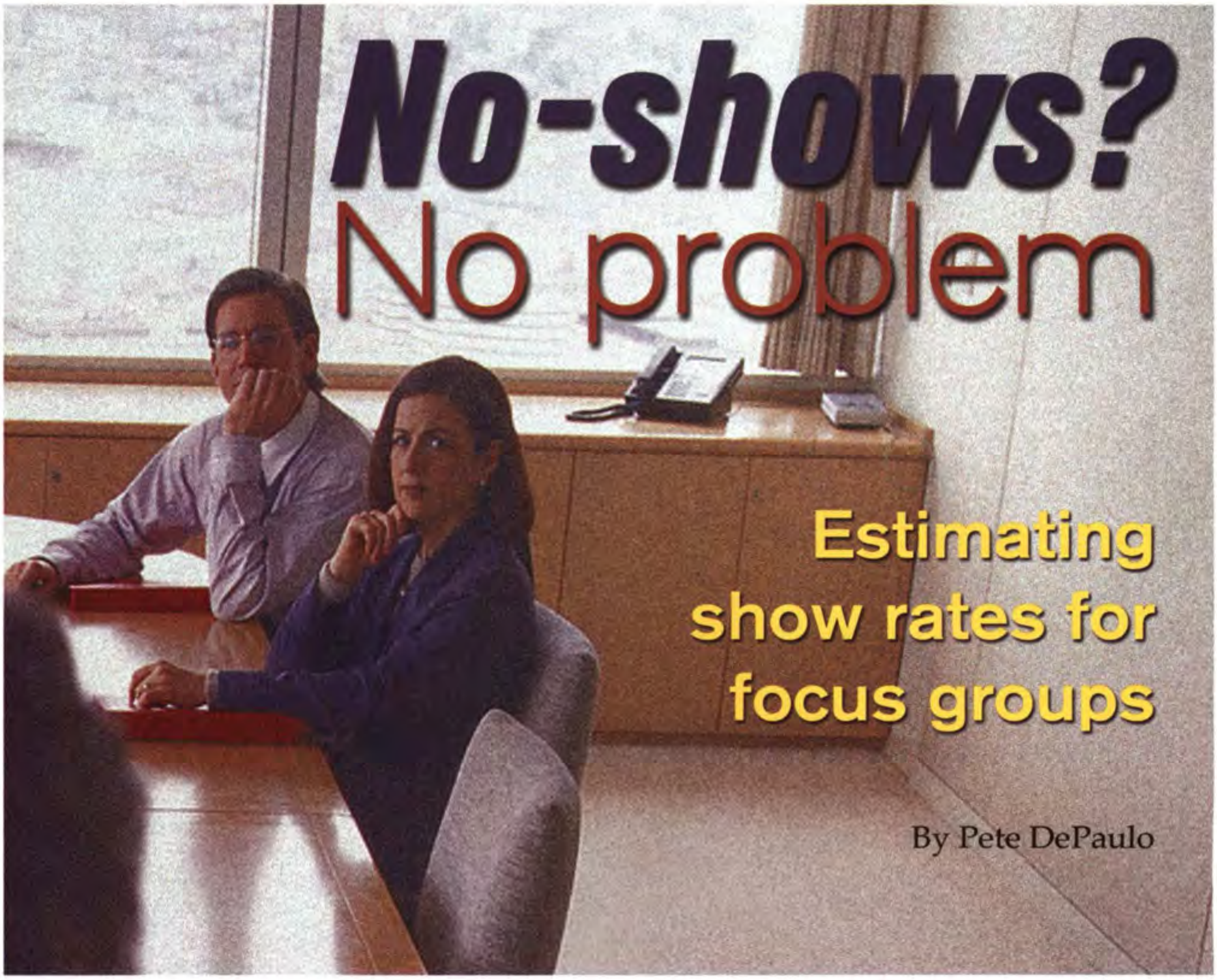
In fishing terms, Moen landed a lunker. The Revolution showerhead is one of those "Why didn't I think of that?" products: an adjustable showerhead that's easy to adjust. Drawing on findings from the ethnographic research, Moen put the controls for the Revolution below the water stream. No more need to reach in and around the stream of water and turn a balky dial with wet hands. With the FreedomDial, bathers can customize the flow to suit their needs as patented technology spins oversized droplets of water and twirls the entire shower stream on its way to the body, giving the sensation that more water is flowing and with greater pressure than regular showerheads.

Tiny camera

The ethnographic sessions involved a warm-up interview to get some basic information about the person and understand their job and their daily life. Video diaries were also made of the respondents' bathrooms and shower areas. During the warm-up interview, technicians placed a tiny camera near the respondents' existing showerhead to give observers a water's-eye view of the proceedings. After the shower, respondents were re-interviewed.

Recruiting for these sessions wasn't as tricky as you might suspect, says Hy Mariampolski, managing director of QualiData Research, the New York and San Francisco-based firm that assisted Moen with its ethnographic research. Using ads in alternative papers, QualiData was able to get a

continued on p. 82



No-shows? No problem

Estimating show rates for focus groups

By Pete DePaulo

Editor's note: Pete DePaulo is an independent moderator and research consultant based in suburban Philadelphia. He can be reached at 215-362-5574 or pete@depaulore-search.com. He wishes to thank Robert Kahle (Kahle Research Solutions), Anndel Martin (Opinions Unlimited), Barbara Rosenthal (Rosenthal Qualitative Research), and Merrill Shugoll (Shugoll Research) for their feedback when this paper was presented at the 2001 annual conference of the Qualitative Research Consultants Association, and to the QRCA Field Committee.

If you do qualitative research, it happens once in a while: too many no-shows. You may have recruited, for example, 12 qualified people for eight to 10 to show for your focus group, but fewer than eight arrive. Now, if there was a blizzard, unusual traffic jam, or some other "act of God" keeping recruits away, well, those things just happen. Nobody is blamed.

But what if there is no good reason for the shortfall? The weather is okay, the traffic is normal, the local team is not in the playoffs, the recruit is routine (e.g., adult users of a common household product), the incentive is the going rate, and the screening questions are innocuous.

Under these circumstances, you might presume that someone, such as the recruiter, must have screwed up — particularly if the number of show-ups is way off (e.g., if you were supposed to get at least eight respondents but only five arrive). At best, faces are red. At worst, heads roll. The moderator may lose her client, the facility manager may lose the moderator's business, and the recruiter may lose his job.

Can we be sure that someone is at fault?

But are we really sure that someone messed up? Or, could the "under-show" have been simply bad luck — a sheer coincidence? After all, if you are handed a new pair of dice and get "snake eyes" the first time you roll them, you do not immediately conclude that the dice are loaded. There is a one in 36 chance of getting snake eyes with honest dice (1/6 X 1/6 = 1/36). But what if you roll the dice four times and get snake eyes every time? The probability of that happening purely by chance is, literally, less than one in a million (1/36 X 1/36 X 1/36 X 1/36 = 1/1,679,616). Now you have

serious doubts about the design of the dice.

By the same logic, we should not consider blaming a low number of show-ups on lax recruiting, unless the possibility of the outcome occurring by coincidence is very small and there was no act of God. But how can we figure the likelihood of an under-show happening purely by chance?

Actually, it's easy. Electronic spreadsheets such as Excel have a binomial distribution function, which can calculate the probabilities we need. Similar probabilities, by the way, are helpful in deciding the sample size needed for qualitative research (see *Quirk's*, December 2000, page 22, or visit www.quirks.com and enter Article Quick Link number 636).

Even if math is not your cup of tea, please read on. You need not know what "binomial" means or how the calculations work. The only catch is that we must make an assumption about the overall show rate (the percent of recruits who can be expected to show up), which must be plugged into the binomial formula.

So, what are typical show rates? To get some show-rate estimates, I consulted with the Field Committee of the Qualitative Research Consultants Association (QRCA). The committee members include facility owners and other consultants interested in issues such as recruiting. The consensus was that 80 percent is about an average show rate (i.e., eight of 10 recruits typically arrive), 90 percent is a very good rate, and 50 percent (teenagers, perhaps) is a really bad rate. Later, committee chair and facility owner Anndel Martin (of Opinions Unlimited) polled 15 GroupNet facility members, who reported that typical show rates range from 75 percent to 85 percent. Another facility owner, Merrill Shugoll, looked at the records of a random sample of 100 groups conducted at Shugoll Research. Of all the recruits for those groups, 80.2 percent showed up.

This range of 75 percent-85 percent makes sense considering that in a typical job, 12 respondents are recruited for eight to 10 to show. If nine people show up, they are 75 percent of the 12 recruits; if 10 showed, they comprise

Now, mark and clip your focus group highlights, live.

You're at a focus group and one of those revealing, content-significant moments occurs. The kind that you used to scribble onto a legal pad, or search for the next day on the piles of videotapes or transcripts.

Now you just click.

Introducing VideoMarker from FocusVision. It's new, simple and a productivity breakthrough for researchers.

With the push of a hand-held button, VideoMarker marks your highlights on a CD-ROM. So when the focus group is over you not only have a CD with the complete session but every important moment is saved in a separate file. The highlights are ready to review immediately on your computer and sort for relevance.

All the key comments are right there, so reports get done in a fraction of the time, ready to present or e-mail, complete with video clips. You could even prepare a preliminary report with verbatims and visuals during the plane ride home.

It's fast, easy, inexpensive and requires no special technology for your PC. And it's available today in many research facilities - more tomorrow. Can be used with or without FocusVision VideoConferencing or VideoStreaming services. Call 800. 433.8128 x6 or check www.focusvision.com for participating facilities.

FocusVision™ VideoMarker™

Get to the good stuff.™

FocusVision Worldwide Inc. 1266 East Main Street, Stamford, CT 06902-3562
Tel: 800-433-8128 Fax: 203-961-0193 E-mail:info@focusvision.com

powered by interclipper

83 percent.

Probability of n recruits showing up

Now we are ready to look at some probabilities. Table 1 reveals the results of Excel's binomial calculations with 80 percent as the presumed overall show rate (i.e., on average, eight in 10 would arrive) and 12 as the presumed number of people recruited.

For example, the probability of all 12 recruits showing up is close to 7 percent. (See "A," 6.9 percent, in the upper left area of Table 1.) Thus, out of every 100 focus groups for which the expected show-up rate is 80 percent and 12 individuals are recruited — and no act of God alters the show rate — attendance would be perfect for approximately seven groups.

At the other extreme, the likelihood of either one person showing up or nobody showing up is less than 0.0001 percent (see "B" and "C" in Table 1) — which is the proverbial "one in a million." If there were no blizzard, unusual traffic jam, or any other act of God, then it would seem extremely likely that someone must have screwed up. Of course, we can't be absolutely certain that if fewer than two recruits show up then something must have gone wrong. After all, someone does win the million-dollar lottery. Still, if there was no act of God, then the most likely explanation obviously would be human error.

The next two columns in the table show what we really need to know: the chances of getting more or less than some meaningful number of show-ups, e.g., fewer than eight if we are recruiting for at least eight to show. As revealed in the last column, the probability of seven or fewer showing up is approximately 7.3 percent ("D" in Table 1). This was calculated by summing the specific probabilities for outcomes below eight in the second column. Let's call it the risk of a disappointment.

Table 1
If The Estimated Show-Up Rate Is 80%
And If 12 People Are Recruited

N exactly		*N* or more		*N* or less	
No. who show up	Probability	No. who Show up	Probability	No. who show up	Probability
12 exactly	6.9%**A**	12 exactly	6.9%	12 or less	100%
11 exactly	20.6%**F**	11 or 12	27.5%**E**	11 or less	93.1%
10 exactly	28.3%	10 or more	55.8%	10 or less	72.5%
9 exactly	23.6%	9 or more	79.5%	9 or less	44.2%
8 exactly	13.3%	8 or more	92.7%	8 or less	20.5%
7 exactly	5.3%	7 or more	98.1%	7 or less	7.3%**D**
6 exactly	1.6%	6 or more	99.6%	6 or less	1.9%
5 exactly	0.3%	5 or more	99.94%	5 or less	0.4%
4 exactly	0.05%	4 or more	99.9938%	4 or less	0.06%
3 exactly	0.006%	3 or more	99.9995%	3 or less	0.006%
2 exactly	0.0004%	2 or more	>99.9999%	2 or less	0.0005%
1 exactly	<0.0001%**B**	1 or more	>99.9999%	1 or less	<0.0001%
0 exactly	<0.0001%**C**	0 or more	100%	0 exactly	<0.0001%
	Total=100%				

A, B, etc.: These numbers are discussed in the text.

Another type of "risk" is that we might have to pay for "over-shows." If we will seat a maximum of 10 respondents (some moderators prefer to set a lower limit), and more than 10 show up, we pay the extras and send them home. The middle section of the table above shows that with an 80 percent show-up rate and 12 recruits, the overpayment risk is 27.5 percent ("E" in Table 1), which is the sum of the probability of getting exactly 12 show-ups (6.9 percent) plus the probability of getting exactly 11 show-ups (20.6 percent, which is "F" in Table 1). Of course, you may regard over-shows as a benefit instead of a risk, because you can pick and choose the most desirable participants out of your pool of show-ups.

The payoff from improving the show rate

Figure 1 reveals the importance of doing whatever can be done to improve the overall show-up rate — such as hiring recruiters with the ability to gain a firm commitment, persuading the recruits that they are likely to enjoy the discussion, paying a sufficient incentive, writing an effective follow-up letter with easy directions, and making confirmation calls.

The main message from Figure 1 is that a small change in the overall show-up rate can make a big difference in how many happy or unhappy

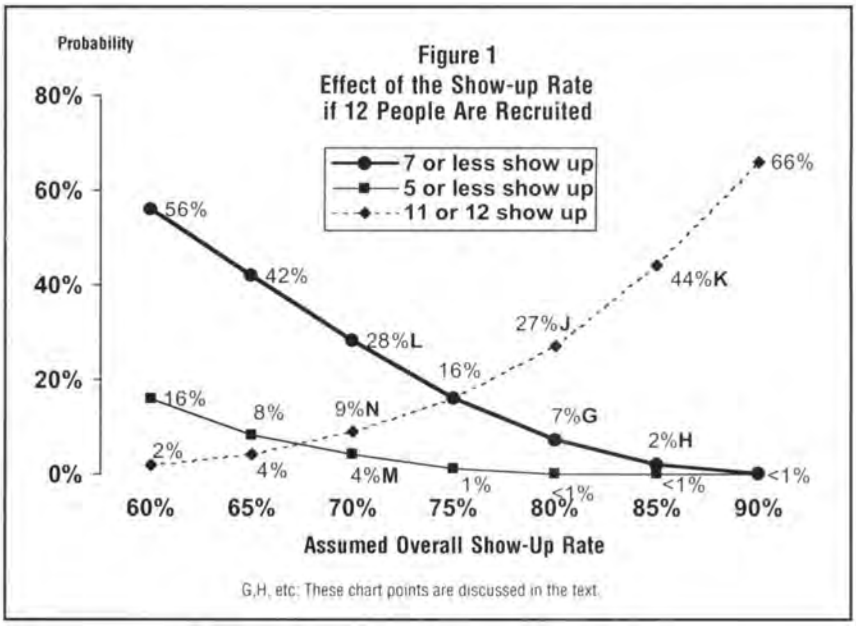


Figure 1
Effect of the Show-up Rate if 12 People Are Recruited

clients you have. Consider, for example, the thick solid line revealing the probability of getting seven or fewer show-ups out of 12 people recruited. The probability of that happening with an overall show rate of 80 percent is our now-familiar 7 percent chance of getting fewer than eight show-ups (see point G in the chart). The next point along this line reveals that if you can improve the overall show rate just 5 percentage points (from 80 percent to 85 percent), then the chance of getting seven or fewer show-ups drops to 2 percent (point H). That means that if you do 100 groups with these specs, you probably would suffer only two disappointing outcomes instead of seven. Looking at the positive side of the coin, the upper dotted line shows that the percent of over-shows (more than 10 show-ups) rises from 27 percent (J) to 44 percent (K) as a result of improving the show-up rate from 80 percent to 85 percent.

Think of what these differences could mean for client satisfaction: fewer clients would be upset by under-shows, and more would be delighted by over-shows from which to pick and choose.

Now let's look at the downside risk of letting your overall show rate fall, if, for example, you fail to place confirmation calls or hire less-skilled recruiters. If the overall rate drops from 80 percent to 70 percent, the probability of a disappointment (seven or fewer show up) quadruples from 7 percent to 28 percent (see point L). Moreover, the chance of a "disaster" (five or fewer show up) rises from near zero to 4 percent (M). Meanwhile, the percentage of groups with delightful over-shows drops from 27 percent to 9 percent (N). Imagine the serious consequences for your reputation and business.

Table 2
The Probability Of Fewer Than Eight Recruits Showing Up Depending On The Number Recruited And The Overall Show Rate

Overall Rate	Number of People Recruited 10	11	12	13	14	15	16	17	18	19	20	21
90%	7.0%	1.9%	0.4%	***<0.1%***	<0.1%	<0.1%	<0.1%	<0.1%	<0.1%	<0.1%	<0.1%	<0.1%
80%	32.2%	16.1%	***7.3%****	***3.0%***	***1.2%***	0.4%	0.1%	***<0.1%***	<0.1%	<0.1%	<0.1%	<0.1%
70%	61.7%	43.0%	27.6%	16.5%	9.3%	5.0%	2.6%	1.3%	0.6%	0.3%	0.1%	***<0.1%***

*Entries emphasized in bold italics are discussed in the text.

The payoff from recruiting one or two more people

Besides increasing your overall show-up rate through better recruiting, another way of avoiding the risk of too few show-ups is simply to recruit more people to begin with — 13 or 14 instead of 12, for example. Table 2 shows the results of recruiting X number of people under three different overall show-up rates.

Let's start by looking at the cell for 12 people recruited under circumstances where the overall show rate of is 80 percent. Again, the table shows our old familiar 7.3 percent risk of fewer than eight persons showing up.

One interesting new insight is that recruiting just one more person (13 instead of 12) goes a long way, cutting the risk of fewer than eight shows by more than half (from 7.3 percent to 3.0 percent). Adding yet another recruit (total=14) cuts the risk to nearly one in 100 (1.2 percent).

Reducing the risk to a tolerable level

What if we want to be virtually certain of getting at least eight people in the group (except for acts of God)? Table 2 suggests three ways of reducing the risk of this embarrassment to less than 0.1 percent (i.e., less than one in a thousand):

• Improve your recruiting procedures to the point where your overall show rate is 90 percent, and then recruit 13 people.

• Maintain an average show rate of 80 percent, and recruit 17 individuals.

• Cheapen your recruiting so that your show-up rate drops to 70 percent, but use the savings to recruit 21 people. (I do not recommend this.)

Table 3 uses a more efficient layout to address the question of how to attain a tolerably low level of risk. This table also includes show-up rates as low as 50 percent for those readers with the unenviable task of targeting the most unreliable respondent populations.

Table 3
To Reduce The Risk Of Fewer Than Eight Showing Up

Number of Recruits Needed

Assumed Show-Up Rate	Risk of 7 or Less Showing <10%	<5%	<1%	<0.1%
90%	10	***11****	***12****	13
80%	12	13	15	17
70%	14	16	18	21
60%	17	19	22	26
50%	21	***23****	***27****	33

*Discussed in the text.

Researchers differ in their tolerance of risk, so your first step in using Table 3 is to decide what level of certainty to shoot for. Do you want, for example, to reduce the risk of an embarrassment to less than 1 percent, or are you willing to gamble with risks of 5 percent or more?

Suppose you can tolerate a 5 percent risk of getting fewer than eight show-ups. Table 3 shows that if you believe your recruiting is savvy enough to deliver 90 percent of recruits to the facility, then you need only recruit 11 people to a group. On the other extreme, if you fear that your ornery target consumers have only a 50 percent likelihood of showing up, then you had better recruit 23 of them. If you want to bring your risk of an under-show below 1 percent, you would need 12 recruits, assuming a 90 percent overall show-up rate and 27 recruits, assuming a 50 percent overall rate.

What if you are doing a mini group and you want at least five to show? See Table 4.

Again, the importance of fine-tuned, reliable procedures for gaining commitment from recruits is apparent, even if you only want a mini group. Table 4 shows that with a 90 percent show-up rate, you only need eight recruits to reduce the chance of fewer than five show-ups to less than 1 percent. If your show-up rate is 50 percent, however, then you must more than double the number of recruits (to 19) for the same degree of assurance.

Table 4
For Mini Groups:
Number of Recruits Needed
to Reduce the Risk of Fewer Than Five Showing Up

Assumed Show-Up Rate	Risk of 4 or Less Showing <10%	<5%	<1%	<0.1%
90%	7	7	***8****	9
80%	8	9	10	12
70%	9	10	12	15
60%	11	13	15	19
50%	14	16	***19****	24

*Discussed in the text.

If you need a different set of numbers

Inevitably, the numbers in this article will not meet the needs of all readers interested in no-show probabilities. If, for example, your client would be disappointed with fewer than 10 in the group, then you would need a table with 10 as the magic number rather than eight or five as I have provided here. That's no problem. Just do your own spreadsheet calculations — it's an easy one-liner. In Excel, the formula for calculating the probability of getting N or fewer showing up is =BINOMDIST(N,R,E,TRUE), where R is the number to be recruited and E is the expected show-up rate, which you enter as a proportion (e.g., "0.8" rather than "80 percent"). TRUE tells Excel that the probability you want is for getting "N or less." (Substituting FALSE gives you the less-useful probability of getting exactly N showing up.)

How to use these probabilities

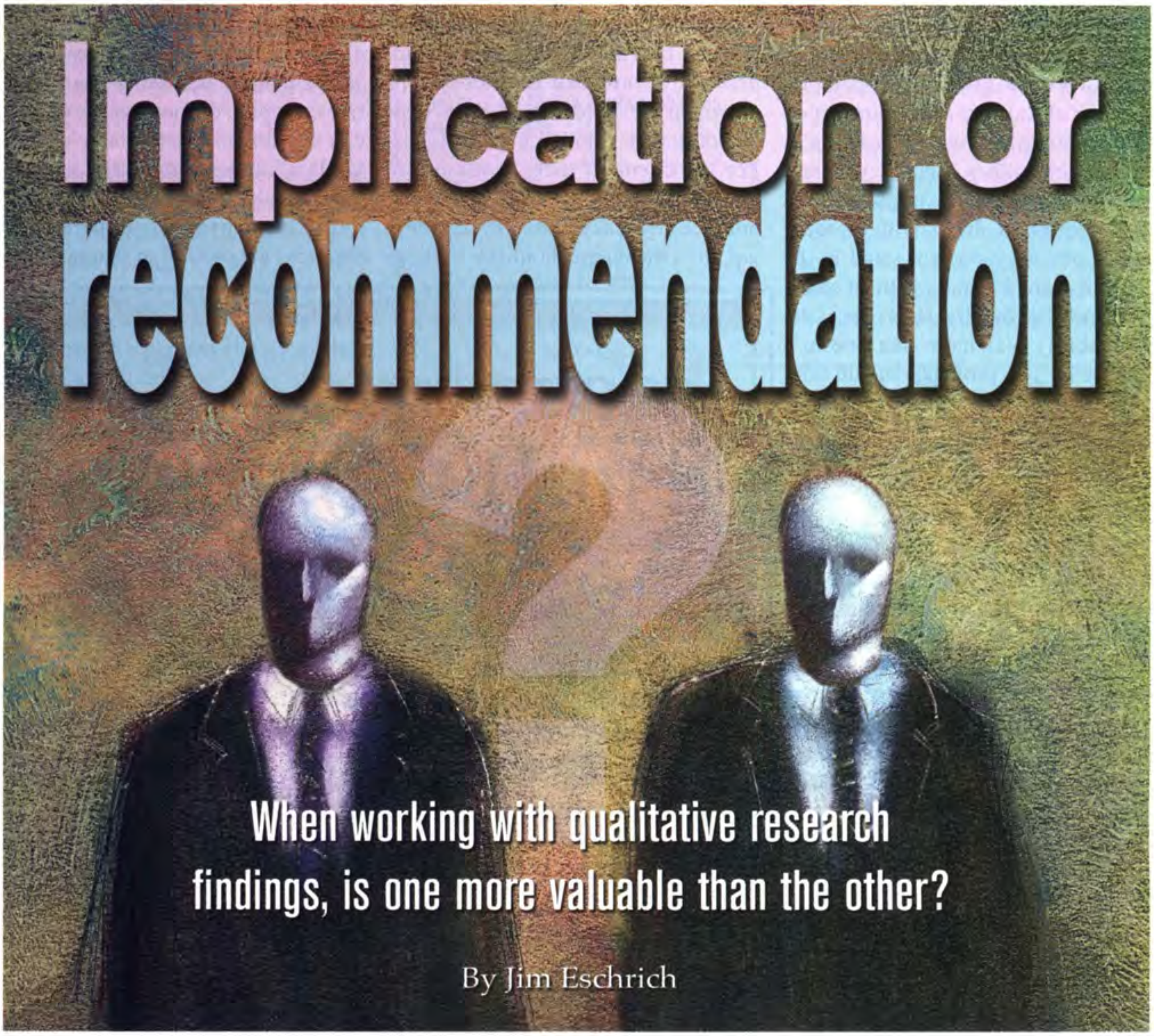
Moderators and clients may use these probabilities in deciding how many people to recruit or in evaluating a recruiter after a disappointing number of show-ups. Of course, other factors ought to be considered besides these probabilities, e.g., the vendor's past track record. You might not let a bad number of shows with a probability of, say, 2 percent stand in the way of doing business with an otherwise reliable facility. However, if the probability was more like one in a thousand, you probably should consider the possibility that the facility's quality is slipping.

At the 2001 QRCA conference there was a session on this topic. Participants offered a number of practical suggestions for avoiding or dealing with the problem of too few recruits showing up. Here are just a few of the many ideas. Barbara Rosenthal described supportive, open communication, e.g., "What can we do to ensure that at least eight show up?" Anndel Martin recommended that the facility and client should agree up front on what the charges would be in case of an under-show. When a serious under-show does happen, Bob Kahle's practice is to call and interview the no-shows, not only to salvage data from them but also to discover why they didn't come. Merrill Shugoll added that if you are using a facility for the first time and get an under-show, call colleagues who have used the facility to see if it has been dependable for them.

Facilities or recruiters may use these probabilities in deciding whether to offer some kind of guarantee. They would want to assure their clients of a certain number of respondents showing up only if the probability of getting fewer than that number by sheer bad luck is sufficiently low. Also, if a client argues for saving budget by reducing the number recruited or the incentive offered, the facility or recruiter could respond by citing the potentially high risk of too few respondents showing up.

Generally, the analyses described here suggest that facilities and recruiters should consider investing to improve their procedures for motivating qualified recruits to show up, because, as illustrated in Figure 1, a small improvement in the show rate can markedly cut down on the incidence of client disappointment. Another implication is for the client: If there is reason to believe that the target respondents may be any less reliable in showing up, then the client should be willing to pay for one or more additional over-recruits.

Of course, a high show rate or large number of over-recruits cannot avoid poor outcomes due to unusual weather, traffic, or events. Nevertheless, increasing your show rate or upping the number of recruits can cut down substantially on the kinds of under-shows that are the most likely to alienate the client: those that happen when there is no apparent act of God to blame.



Implication or recommendation

When working with qualitative research findings, is one more valuable than the other?

By Jim Eschrich

Editor's note: Jim Eschrich is president of Catalyst Qualitative Services, Inc., Lenexa, Kan. He can be reached at 913-599-1131 or at catalystq@aol.com.

Picture this scene: call it Project Perfecto: the Perfect Qualitative Project. You (our hero!) were challenged with a large, complex, research dilemma. You somehow worked your way through the tangled internal politics with the client. You clarified the issues, recruited just the right people, asked the right questions, probed beneath the surface, and unraveled several breakthrough insights. Gasps, applause from the back room! You can't stop to bask, you're way too focused on wrapping up the final comments of what looks to be a groundbreaking study that will change the industry's strategic direction for years to come. At last, the voice of the consumer is heard, and you're the megaphone!

There are at least two possible endings for this scenario.

One I'll call Recommendations. In this ending, all the loose ends are snipped, all the questions have tidy answers, and the client goes home happy with an action plan presented by the dapper, all-knowing Inspector Research, who solved the problems and saved the day.

The other I'll call Implications. In this ending, complications are still a bit complicated. Questions have answers, but the answers often lead to new questions. The client goes away with a depth of awareness and insight unavailable in any other way, and the researcher, like a grungy modern detective, has no intention of wrapping up the case in a gasp of awareness and an admission of guilt. This research has brought depth and light to an interesting subject. The client now has to balance the new awareness with other priorities and projects, accepting the responsibility for what's next...the next questions to ask, the next strategy to pursue, and, perhaps, the next things to do.

Who would you rather be? Inspector Recommendo, who delivers the goods

— wrapped up and ready to go? Or Detective Implicatio, who brings insight, understanding, and qualitative suggestions about future directions? What's the right ending?

Implications most important

Recommendations have allure. They make the client happy — when they agree with the client's plans — and they make the researcher feel like a hotshot solver of the insoluble. But, however attractive that may be, it is my contention that offering definitive recommendations based on qualitative research is a contradiction in terms. I propose the idea that implications, not recommendations, are the most important product of qualitative research.

I did not always think this way. I've worked both sides of the one-way mirror. As a buyer of research for a major corporation, I requested recommendations. And, as a supplier of research to small and large, local and international clients, I am often asked to add my recommendations. The client wants answers, and the researcher is hired to supply some answers as the coordinator of consumer response. It's also an ego boost — who among us doesn't have an opinion on a subject when a powerful client asks the question, "What should I do?" We channel surf with the best of people, and have opinions on a lot of wildly diverse and subtle subjects. Who better to recommend changes in products, processes, presentation or pricing? Who better to sum up the consumer input in the form of a prescription for improvement?

I now think the client is the one who is better suited to move from implications to recommendations — from information-gathering to decision-making. After wrestling with this issue for several years, it is my opinion that the researcher as recommender is directly at odds with the statement of limitations that precedes nearly all qualitative research reports. The statement reads something like this:

Limitations

It is important to note that these focus groups sought to develop insight into respondent attitudes and needs, generate hypotheses, and suggest direction. The reader of this report should remember that small sample size, special recruiting methods, and regional limitations associated with this type of research preclude drawing any definitive conclusions.

Note that it says "develop insight...generate hypotheses...suggest direction." These are quite different aspirations from those found in recommendations.

Let's start with definitions. According to the dictionary, "recommendation" is derived from the Middle English *recommenden*, meaning to praise. It means "to present as worthy of acceptance...to endorse as fit, worthy, or competent...to advise."

"Implication" is derived from the root word "imply," which evolved from the Middle English *emplien*, meaning to enfold or entwine — "to involve by inference association, or necessary consequence rather than by direct statement." So, a recommendation is an endorsement of a course of action — it says, "Do this." An implication exhibits a relationship, something implied — it says, "This suggests this." It's a matter of strapping on a feedbag versus leading a horse to water. In the first case, the proverbial horse has no choice, in the second, the horse makes the decision.

I do not think this is simply "toe-may-toe" vs. "toe-mah-toe" semantics. The difference is significant, and, in my opinion, the resulting clarity of purpose enhances the role of research in the client's arsenal of effective marketing tools. Recommendations offer a to-do list based on a small sampling. Implications offer a buffet of choices based on the leading indicators of a research sampling. There's a world of difference between the two approaches.

The strong prescriptive nature of a recommendation goes beyond the researcher's responsibility, I contend, whereas the logical connections made by implications better bear the burden of research as a tool of corporate decision makers. So can researchers reconcile offering recommendations generated from a respondent base that is small in size, selective in method, narrow in scope, and limited by geography, time, and respondent availability? Of course they can. Clients expect it and the client is the boss.

Clients are part of the solution

This goes to the heart of the matter — the shared expectations of client and supplier. We need to clarify the results the client can expect to receive and articulate the superiority of implications versus the knee-jerk request for recommendations. Giving the client the results of the research with the implications clarified is the right solution. I contend that we are doing a disservice to our profession and to our clients' business needs by supplying recommendations about subjects outside our field of expertise.

Again, when I was hiring out research on the corporate, client side, I wanted recommendations. Now that I'm on the outside being hired as an independent research supplier, I started adding recommendations to my results. I thought that that was what the client wanted. (Ask some of my clients, they'll probably tell you that I'm not shy about my opinions.) Now I'm seeing things another way. I see research recommendations as opinions, and no more. The situation calls for focused expertise from both sides — research, probing implications, and clients turning the implications into recommended decisions.

Now that I cover many product categories in many industries, and deal with respondents who are end-consumers, gift purchasers, and corporate business-to-business users, I feel less responsible offering prescriptive results from my efforts. I hesitate to say, "Do this." I am more comfortable, and feel more honest and successful pointing out the linkages, and allowing the client to make the connections and make up their own mind about what action to take.

The distinction is basically between information-gathering and decision-making. Implications provide direction based on information gathered through research. Recommendations lead the way to a decision based upon that information. I think it is completely within the scope of the research facilitator to seek the deep implications from the information that has been gathered. It is also the distinct domain of the client to make decisions based on the information gathered. It's that next step — making decisions — that goes beyond the scope of the research practitioner.

Here is an example of what I consider an implication from a study I recently worked on. A company needed to understand why a new program targeted at a specific market segment generated an excessive number of calls to its customer care center. The research findings indicated that many elements of the program were counterintuitive, and that many of the customers in the program failed to take any responsibility for educating themselves about the program despite numerous mailings of material.

The findings suggested to us that the program needed to be simplified or made more intuitive. We offered examples of how this might be done, but we offered no definitive recommendations. The findings also suggested that expecting these customers to read the material sent to them about the program was unrealistic. This, in turn, suggested to us that the responsibility for educating customers about the program needed to shift away from the customer to the company. Again, we offered an example of how this might be done, but shied away from offering any recommendations.

Notice that I didn't tell or direct my client to do anything. I restated a key finding emanating from the study, explained what it suggested to me and offered an example to clarify the linkage I was making.

Superior tool of analysis

I would contend further that implication-seeking as a tool is superior to recommendation-making. When we focus on openness to all that the research implies we open ourselves to a wealth of possibilities. Some of the possibilities are literal — the quotes and phrases and physical actions of respondents; others are more figurative — seeing linkages and relationships between clusters of respondents, between demographics and psychographics of respondents, and all sorts of other beneath-the-surface motivators. Also, implications are derived from what was not said, arguments not made, complaints not surfaced, or problems not articulated. The search for implications leads the researcher to dig deeper and look longer at the evidence presented to gather all the information available and make all the connections that are relevant. This is qualitative research on steroids — the process at full efficiency.

Looking for recommendations, however, leads to bottom-line, closed thinking. Once you've prescribed that "this plus that equals four," there's no more to explore. The process of answer-seeking to make the right decisions gives short shrift to the analytical, creative mind, which tests every bit of evidence to corroborate decisions and simplifies to get to the answer. This process short-changes that exploration process for the destination. It's answer-thinking rather than expansive-thinking.

It must be admitted however that implication-seeking is slower, messier, and more complicated. Implications deliver all the contradictory evidence without oversimplifying. Implications can be more difficult to convey; complications stay intact because complex issues are, well, complex. They're not dumbed down for the sake of a simple answer. Recommendations are a bit easier. They tend to simplify and remove contradictions in order to get to the broadest, most efficient answer possible. But, again, it is in the client's best interest to deliver a multi-faceted, richly detailed, fully accountable report of implications. From those implications, it is the client's job to understand and incorporate these implications in the decision-making process, and in any final actions resulting from the research.

I believe that there are some instances where recommendations are an integral part of the research assignment. Where there is a legitimate need for urgent, actionable recommendations, then I would contend that this is the line of questioning to the respondents: "What should the client do? Give us your recommendations." In this case, the research is not so much attitude-probing as advice-gathering. This doesn't happen often, but it would be one instance where I would support recommendations.

But in the normal course of qualitative research, I believe it is better to teach a client to fish than to hand over the proverbial filet. Implications properly handled provide clients a way to think about an issue. Understanding the connections revealed by research is a powerful business skill. Even though it is tempting to deliver pre-digested recommendations, some restraint should be used in interpreting results and extrapolating meaning. It's better for both provider and client when skills are focused with laser-like precision on the scope of the business at hand. Research focuses on implications; the business client focuses on recommendations for his or her own internal systems. In the transfer of skills, you're not giving up power or future business, you're gaining a better, smarter, more effective client, and earning the respect and loyalty of a customer who will come back to you again and again.

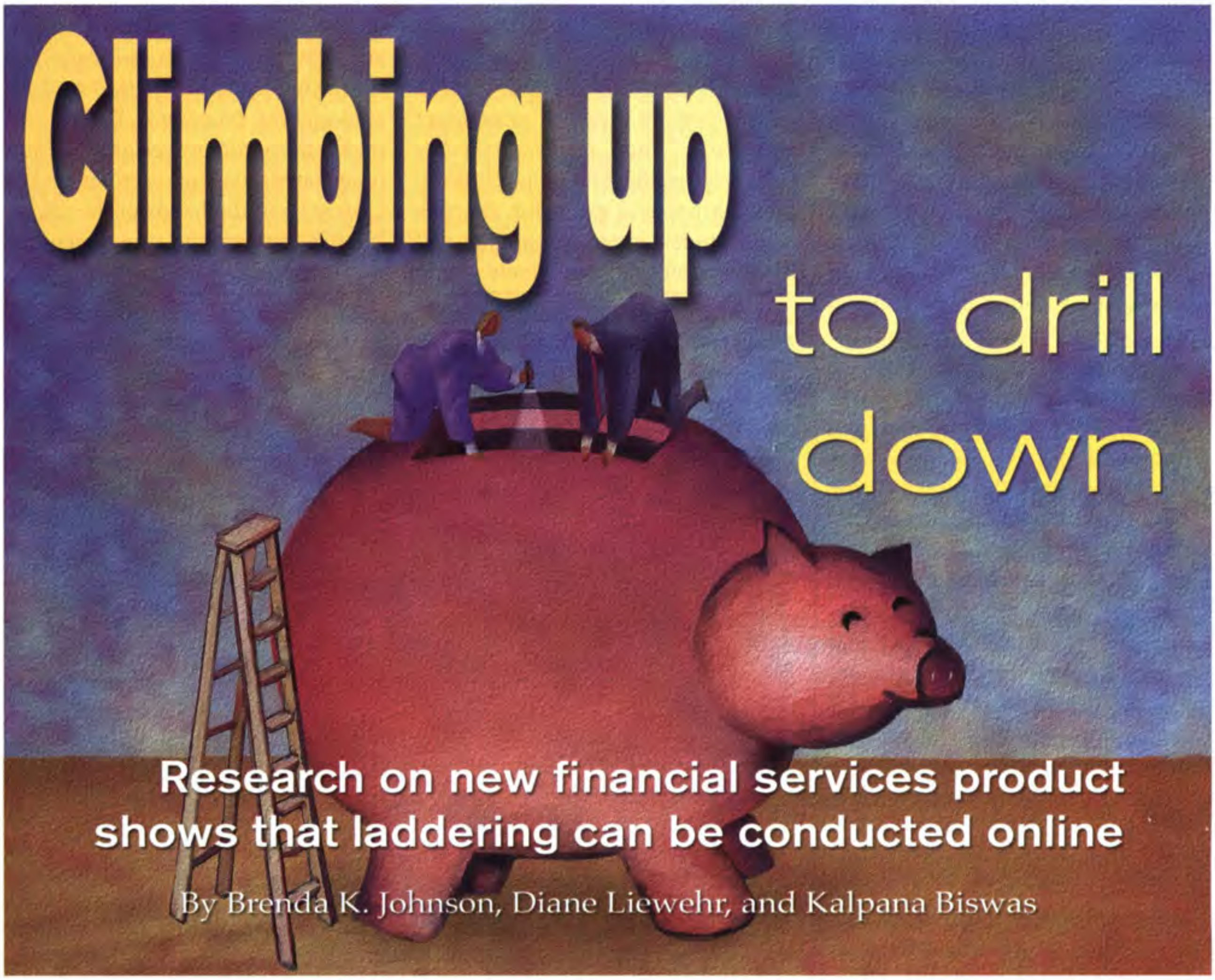
A synthesis of the two

What's needed finally is a synthesis — an active interaction between the two disciplines of implication presentation and recommendation-making. The synthesis begins with expectations. Research needs to be clear in saying that its scope is respondent relations and representation. Research is the expert in finding, drawing out and exploring the values, attitudes, interests, passions and lifestyle needs of respondents — and then accurately presenting the implications of those findings as they relate to the client's interests. The client is the expert in presenting stimulus, clarifying the business needs, and, after the research, in incorporating the implications into its own decision-making processes. The recommendations for prescriptive action based on respondent reactions should clearly be in the hands of the client. Implications are the true domain of the researcher.

Climbing up to drill down

Research on new financial services product shows that laddering can be conducted online

By Brenda K. Johnson, Diane Liewehr, and Kalpana Biswas



Editor's note: Brenda K. Johnson is director of QualQuan Insights, Inc., a Maplewood, N.J., research firm. She can be reached at brenda@qualquaninsights.com or at 973-676-7975. Diane Liewehr is vice president, JPMorgan Chase & Co., New York. She can be reached at liewehr@aol.com or at 212-721-9336. Kalpana Biswas is research associate, Prescott & Associates, a Pittsburgh research firm. She can be reached at kalpana@prescottassociates.com or at 412-968-0800.

The general assumption in consumer research is that people select products based on a combination of product or image attributes that lead them to expect certain desired outcomes or consequences. For example, a consumer may find a product's convenience appealing because it means she can spend more time with her children. A qualitative research technique called laddering takes this process further, deconstructing consumer decision-making by uncovering the link between desired outcomes and a set of core personal values that govern a consumer's world view.

During the laddering process, the interviewer asks a participant a series of "Why is that important or relevant to you?" "What is the benefit of that?" or "What does that mean to you?" questions in a focused, and often intense, one-on-one interview process. Laddering encourages participants to delve deeper and deeper into their psyche to discover the frequently complex pathways between tangible product attributes and an often unconscious network of inner motivations.

A researcher is typically able to ladder three or four product attributes that are of particular importance to each participant during a session. An analysis of the means-end ladders of the entire sample may lead to the discovery of commonalities in personal ladders or meaning systems that could define particular consumer segments and enable more sharply focused positioning or marketing strategies.

The face-to-face approach has, so far, been considered the most appropriate way to achieve richly detailed explorations of personal connections between product attributes, physical consequences, emotional conse-

quences, and personal values or life goals. But improvements in the software used to conduct online qualitative research and corresponding enhancements in researchers' online moderating skills have opened up two important avenues to advance the practice and decrease the cost of laddering. First, it has now become possible to conduct laddering exercises online, to take advantage of the flexibility, versatility, and geographic reach of the new medium. Second, a modified "one-on-several" simultaneous individual laddering exercise offers potential for significant cost-cutting opportunities — an important consideration in the current economic climate.

A simple hypothesis

This article illustrates the successful use of an alternative platform for conducting laddering drills. We began with a simple hypothesis: online laddering drills can uncover links between product attributes and consumer emotions equivalent to those achieved through traditional methods. Our hypothesis was supported by results obtained during a side-by-side comparison of online versus offline research platforms. If laddering drills can indeed be effectively conducted online without sacrificing quality, the next step is to examine the financial implications of using online versus traditional offline platforms.

Our research project, for a new Chase financial product, followed an intensive quantitative and qualitative research process, including eight online focus groups with two to four participants in each group, and 12 one-on-one in-depth interviews. An additional three telephone interviews were added to round out the exploration of traditional versus online platforms.

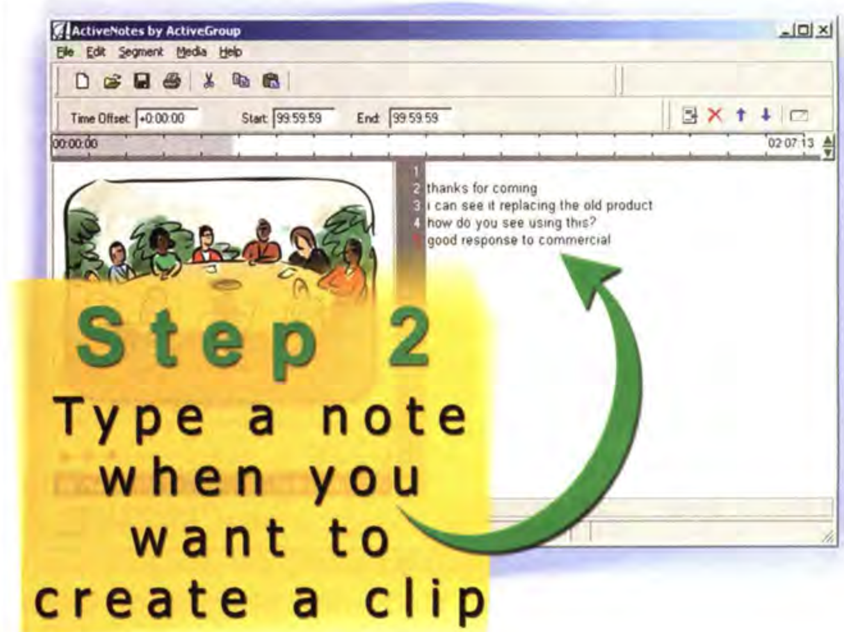
The article will show that:

- participants are well-behaved, involved, and cooperative during laddering drills — online or offline;
- emotional links across platforms are equivalent in quality and direction;
- imagery from the online platform is solid, evocative and not lacking in emotional content; and
- real dollar savings are available by leveraging the features of the virtual online space.

Topic guide

In preparation for the research, a detailed topic guide was constructed, programmed into the online chat software, and then presented to a group of eight participants in an online focus group.

The computer screen was split into two frames. The online moderating, probing, and participant reaction occurred in the frame below the display area, commonly referred to as the "whiteboard." The whiteboard is used to present stimuli for participants to react to and discuss, and can be enlarged by participants for a better view. Stimuli presented on the whiteboard are usually limited to Web site evaluations, new product or service



concepts, print ads, or other text-based stimuli.

Methodologically, online laddering offers a significant benefit over in-person interviews: it enables the simultaneous participation of two to three respondents in parallel laddering processes in real time, facilitated by a single moderator. In this model, enhanced by the "review button" and the whiteboard, one moderator conducts two to three parallel online interviews within a mini-group structure, with the interviewees responding to the same broad questions.

(The review button is a software feature of the virtual focus group facility that allows the moderator to edit any preloaded questions before hitting the "send" button and allowing participants to see and react to the questions. This button also lets the moderator create questions on-the-fly for reaction by the entire group of participants, by a select few, or by just one individual. Use of this button enhanced the research process because the moderator was able to individualize questions simultaneously to conduct the individual laddering drills in a group environment.)

A series of customized probes, based on previous responses, keeps each individual in his or her own separate emotional track. The ability of the moderator to multi-task in this context (to read and respond cogently to two or three parallel streams) is key to the model's success, as demonstrated in our research.

The specific features of this model that contributed to the success of online laddering are:

• *Establishing the ground rules under which participants are to communicate during the laddering drills*

A brief warm-up, during which respondents are able to interact with each other, encourages respondent involvement and cooperation. However, it is crucial to establish very quickly thereafter that respondents must focus on and respond only to questions specifically directed at or relevant to them. The detailed introduction instructs each respondent to conduct an individual conversation with the moderator.

• *Prefacing all questions with the names of the respondents in order to focus and direct the individual interviews*

Once familiar with the process, respondents are able to keep to their own customized "tracks" directed by the sight of their names and their individualized questions. The moderator uses cut-and-paste methods to personalize the next question by using the respondents' own words from previous answers.

• *Sensing and maintaining a certain optimum speed of response for each respondent*

This speed should be rapid enough to keep the respondent occupied with his or her own response track yet allow each respondent time to provide detailed and thoughtful responses. When familiar with the procedure, respondents are quick to scan messages to seek out and answer those directed at them.

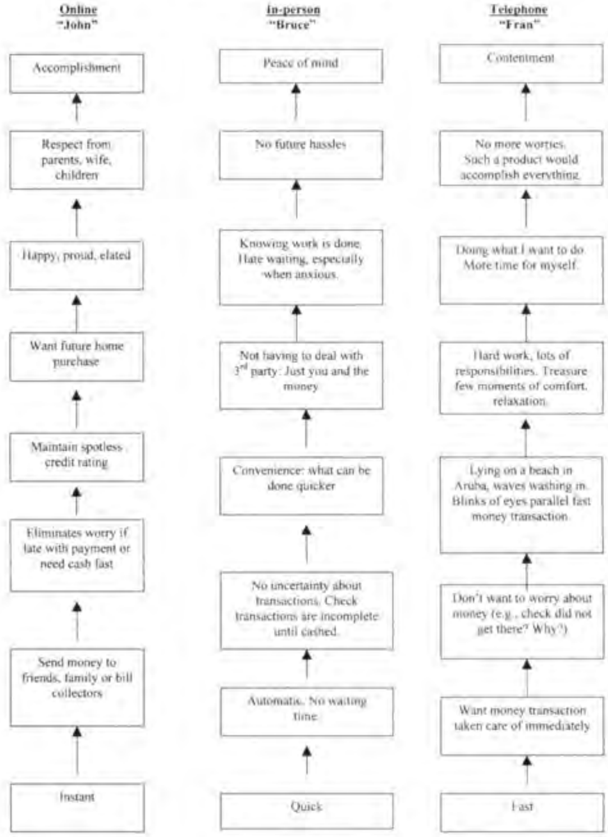
• *Multi-tasking skills of the moderator*

Online qualitative research requires the moderator to possess additional skills. He or she of course must be experienced in moderating, but additionally must be proficient technologically in multi-tasking in virtual space. This may take some time for moderators to get used to. Some will simply shy away from this online platform and, in defense, assert that "it can't be done" or "online does not give you the same information."

• *Bonding quickly with online participants*

The sooner the online participant feels he or she can trust the moderator, the sooner the required information flows. This result is very consistent with conventional focus groups. Tricks that help the moderator obtain early trust include mutual sharing of some personal details during the brief warm-up, recognizing each participant as an individual, speaking to them frequently to affirm/acknowledge their input, and probing when needed.

Chart 1: Laddering Across Media (1)



Cost-saving benefits

The added values that online laddering offers over traditional methods are cost efficiencies and geographical reach. The typical ratio of interview lengths of in-person versus online interviews is 1:1.5 (e.g., 60 minutes in-person to 90 minutes online). With a parallel laddering sample design, the following efficiencies can be expected:

• one facility rental for every three respondents, as against one-to-one for in-person interviews;

• one-hour rental per in-person respondent, as against 90 minutes for three respondents online (or an average of 30 minutes per online respondent);

• 180 cumulative minutes of information for three in-person interviewees, as against 270 cumulative minutes for three online interviewees;

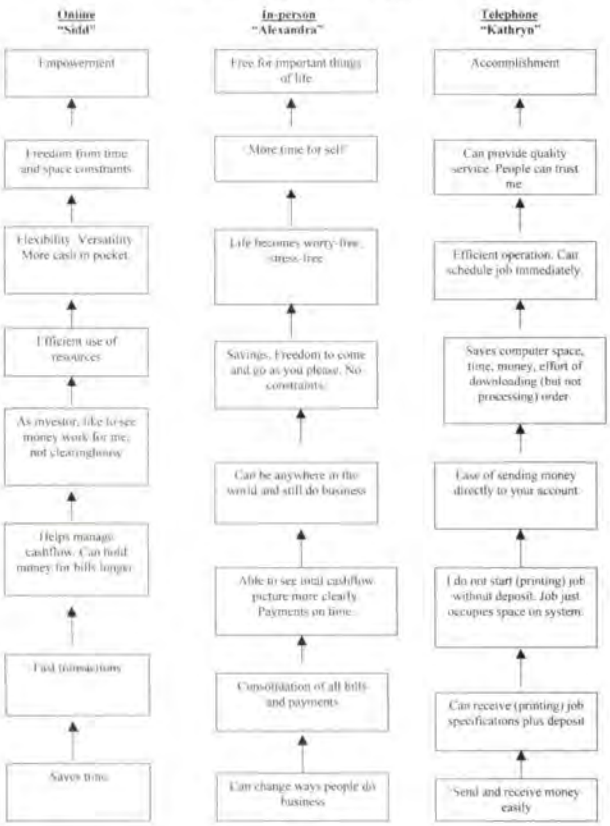
• one moderator for three interviews during 90 minutes, as against one moderator for one interview during 60 minutes;

• participant incentives are lower for online sessions;

• recruitment costs may be lower.

The geographic reach of the online project was aptly demonstrated during our research project; the participants of the online groups were drawn from different states across the U.S. In order to keep costs down, unless performed through the telephone, traditional laddering is usually clustered in

Chart 2: Laddering Across Media (2)



a few select locations. Thus, data collection in multiple states becomes more expensive as compared to online laddering.

Results

The ability and willingness of online respondents to reveal their emotional links to the test product supported the hypothesis that there are few media-specific advantages or disadvantages when constructing ladders or means-end chains.

The new product being tested in the research was an e-payment option that allows users to easily and quickly send money to anyone, anywhere, including friends, family, and merchants, in a secure online environment. It can be used with a consumer's existing checking account or credit card account. A new banking account isn't necessary.

Charts 1 and 2 demonstrate the similarities in the quality of information across the three media tested — online, in-person, and telephone. Chart 3 shows how three respondents in the same online focus group, responding to the same general questions about product appeal and salience, arrived at three different means-end constructs, based on their own personal priorities.

The online laddering drills produced imagery valuable for brand positioning, advertising, and other forms of marketing communication. The research demonstrated that people can be emotionally expressive and articulate when online, and can provide evocative imagery in their responses. Some insights and imagery obtained from these online laddering drills include:

"It gives me control over bill paying that the postal service does not."

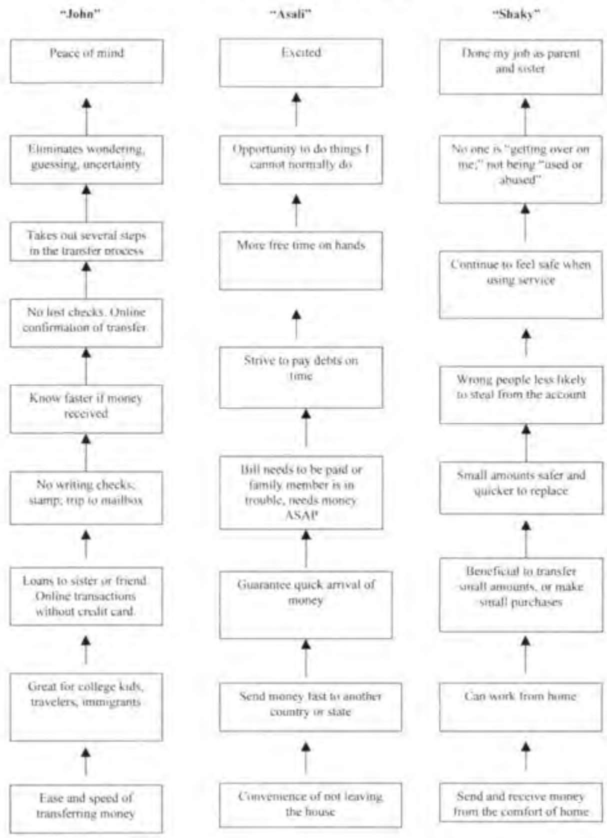
"I love the immediate gratification which comes from online shopping. Sometimes I buy items I need promptly. Other times I buy online as a treat to myself — and I don't want to wait for a treat to arrive."

"A sense of relief. I would hate to think that I couldn't purchase a new house, etc., for my family because of stupidity. If you do not pay your bills on time you will pay for it in the end when you expect people to trust you with a loan."

"Saturday afternoon I log online and find I have an e-mail from my sister-in-law who lives 1,500 miles away. She wants me to FedEx some lobsters to her and has sent me the money. I stop by the ATM near my home, withdraw the cash, go to the fish market. They're having lobster for dinner Monday night!"

"Sending my stepdaughter money was fast and easy. Considering that

Chart 3: Parallel Ladders from Online Focus Group



we are in the middle of a blizzard in CT, it was easy to do. Now, she can get her car out of the snowbank. She forgot her purse. Going out into a blizzard is not fun, especially when my stepdaughter is 30 miles away. Getting the money into her hands ASAP is important to take care of her child and give me peace of mind that I was able to help her out in this emergency."

"Makes it possible to spend more time on things you can't get back, can't recover."

Some key learning from laddering online:

• The virtual waiting room provided the opportunity to prescreen for actual online laddering participation.

• Participants were well-behaved, expressive, and eager to communicate during the online laddering drills. Establishing the "rules of engagement" provided both the structure and flexibility to online laddering.

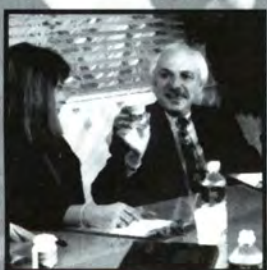
• Online laddering offers a surprising benefit: moderator and participants can toggle between individual interviews and interactive discussion.

• The software features of a virtual chat room provide the opportunity to engage in, creatively direct, and enrich online laddering.

No loss in data

Our research found that the online environment can be used to identify key product and image attributes to establish brand essence and emotional links to a new financial product. Some of the language consumers used was incorporated into the new product launch and promotion campaigns. A side-by-side comparison of online, face-to-face, and telephone interviews provided support for the hypothesis that there is no loss in data when online laddering is conducted. Vivid language and imagery were obtained through the online platform and this information was found to be consistent with that gleaned from face-to-face/telephone one-on-one interviews. Finally, the research identified some specific criteria that can render online laddering effective, and this effectiveness translates into cost savings for clients.

Focus Groups • Telephone Interviews • Internet Surveys



IN THE DARK ABOUT WHERE TO HOLD YOUR NEXT FOCUS GROUP?

At Innovative Concepts Marketing Research, you will find a superb facility and a focus on service. Whatever it takes to make your group sessions a success-you've got it. We're sure you'll appreciate the difference even in the dark.

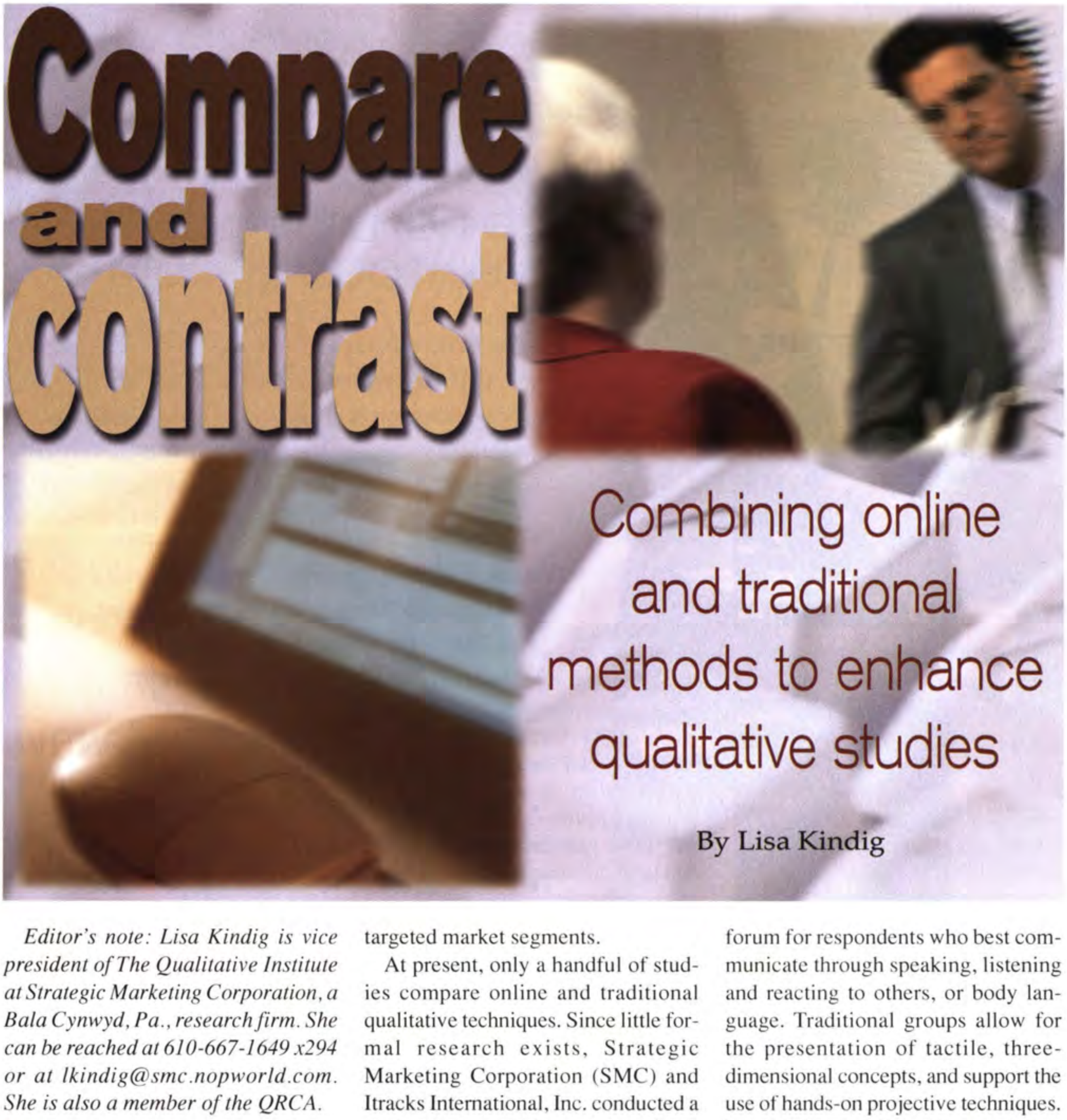
Now you have a better base for qualitative research right in the heart of one of America's prime markets - Nassau County, NY. It's better, even before the groups begin, because our in-house interviewing staff has years of screening expertise.

- Comfortable and functional
- Client meeting lounge with closed circuit TV
- Fully equipped client office
- Advanced audio/visual with backups
- Focus Room: 23′ x 19′
- Viewing Room: 13′ x 14′, seats 14
- Mirror Dimensions: 11′ x 5′

Call us at 800.631.0209
or 516.479.2200
Fax: 516.479.2215
or visit us on the web
at www.ic-mr.com.

INNOVATIVE
CONCEPTS
MARKETING
RESEARCH, INC.

200 Stonehinge Lane
Carle Place, NY 11514



Compare and contrast

Combining online and traditional methods to enhance qualitative studies

By Lisa Kindig

Editor's note: Lisa Kindig is vice president of The Qualitative Institute at Strategic Marketing Corporation, a Bala Cynwyd, Pa., research firm. She can be reached at 610-667-1649 x294 or at lkindig@smc.nopworld.com. She is also a member of the QRCA.

For some qualitative market research studies, using face-to-face and online methods in tandem can leverage the benefits and mitigate the drawbacks of both. To design efficient and effective projects, market research buyers and sellers must partner and consider all available methods for understanding the experiences, opinions, and motivators of targeted market segments.

At present, only a handful of studies compare online and traditional qualitative techniques. Since little formal research exists, Strategic Marketing Corporation (SMC) and Itracks International, Inc. conducted a study to compare face-to-face focus groups with both asynchronous (bulletin board) and synchronous (chat-style) online groups. The findings from this study match SMC's anecdotal experiences with face-to-face and online qualitative research.

Face-to-face research offers some distinct advantages over online methods. First, the nature of face-to-face discussion provides an effective forum for respondents who best communicate through speaking, listening and reacting to others, or body language. Traditional groups allow for the presentation of tactile, three-dimensional concepts, and support the use of hands-on projective techniques. In addition, while still permitting interactivity through demo CDs and live Web connections in the focus group room, traditional groups limit the potential for technology failure.

Also, respondent show rates are higher for face-to-face research: 50 percent higher than asynchronous online groups, and 100 percent higher than synchronous online groups. Traditional qualitative research also

offers more efficient use of sample; recruiting for online groups requires five to 10 times as many pieces of usable sample as recruiting for face-to-face groups. Finally, recruiting for traditional groups draws from a larger population base, as lack of online access does not limit participation.

Face-to-Face Groups	Online Groups
Effective for respondents comfortable with verbal, aural or body language	Effective for respondents comfortable with textual and iconic communication
Larger population base from which to recruit	Greater geographic reach and dispersion
Higher respondent "show" rates	Access to low-incidence populations
More efficient use of sample	Instantaneous transcripts
Better presentation of tactile concepts	Better presentation of interactive concepts
Impact of group dynamics can be used to advantage the discussion design	Minimize opportunities for group domination and peer influence
Supports in-depth probing and hands-on projective techniques	Single moderator can conduct multiple groups simultaneously (asynchronous)
Less subject to technology failure	No travel/travel costs

At the same time, online qualitative methods provide unique advantages over face-to-face techniques. Online groups allow geographic diversity, and can involve respondents not easily recruited for traditional groups. This includes participants who are homebound or from areas with low population density, as well as those with low-incidence conditions or characteristics (such as specific types of illness or expertise). In our study, respondents in traditional groups came solely from the Philadelphia area. Online, respondents represented 25 states, including areas not routinely visited for market research.

Online groups reduce the opportunity for individual respondents to dominate the discussion, and the influence of group dynamics also fades. Our research design included physician-only, patient-only, and mixed physician-patient face-to-face focus groups, and mixed physician-patient online groups. While our results indicate that we successfully elicited honest, direct dialogues in all of these research environments, it took much more moderator sophistication and skill to mix physicians and patients face-to-face than to mix them online.

Other advantages of online groups include the opportunity to view and discuss dynamic online concepts in a live interactive environment, the ability to view and conduct groups from any location, and the immediate availability of discussion transcripts. Finally, the nature of online discussion provides an effective forum for those respondents who are not comfortable with face-to-face interaction, or whose best communication modes are textual or iconic.

It is important to note that we did not experience differences in project cost and speed of execution between our face-to-face and online groups. This also matches our prior anecdotal experience. We suggest that the nature of the respondents and the research

Are we alone in the universe?

Get Quick, Accurate "Down to Earth" Research - Harris Interactive QuickQuery℠

From a recent QuickQuery survey, Americans believe aliens/other life forms*:	
Will visit earth in the future	
Have visited earth	
Are currently among us	
None of these	

scratch here

You are never alone with **Harris Interactive QuickQuery.** Our professionals will work with you on question development. Use QuickQuery to get projectable, accurate, nationwide, results quickly.

Which region of the United States is most likely to believe "we are not alone in the Universe"*:	
Northeast	
Midwest	
South	
West	

scratch here

Mention this ad and this number to receive 10% OFF your next QuickQuery.

Research at "warp speed" – get **2000 responses** in just **2 days**. It's almost as quick as scratching off the answers. QuickQuery is an omnibus survey that leverages the power of the Internet to quickly and economically answer your toughest consumer-based questions.

Harris Interactive is a global leader in Internet-based market research, with a multimillion member online panel.

HarrisInteractive℠

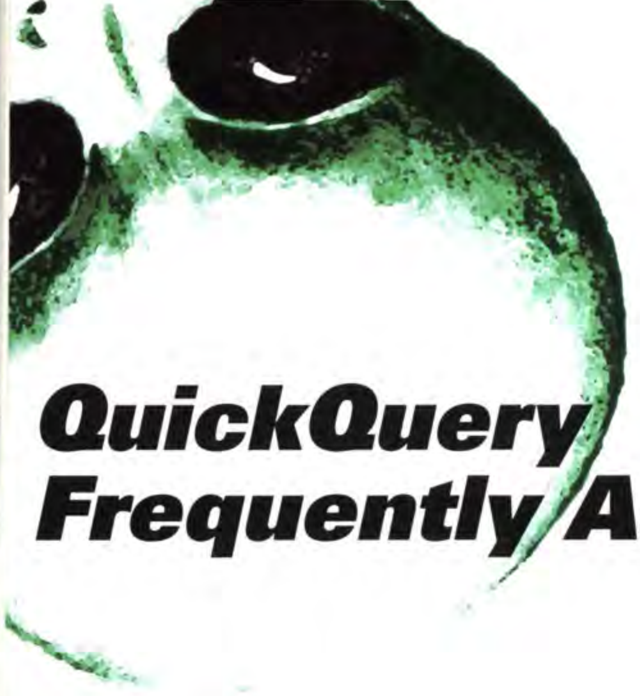
MARKET RESEARCH

Harris Heritage. Interactive Power.

*Since respondents can choose more than one answer, percentages can exceed 100%.

USA ATHENS 2004 OFFICIAL PROVIDER

www.harrisinteractive.com Tel 877.919.4765



QuickQuery Frequently Asked Questions

What is QuickQuery?
QuickQuery is an online omnibus service that lets you ask questions and get projectable answers from 2,000 respondents nationwide.

How quickly do I get results?
Two working days.

Why do you offer such a large sample when other omnibus services usually provide only 1,000 respondents?
- Twice the sample provides better reporting for lower incidence target populations.
- Larger samples enable clients to segment data.

How many questions can I ask on a single survey?
Up to 25.

Is there a minimum number of questions?
Not as long as there are at least 10 questions across all clients.

Do the surveys themselves have full functionality?
Yes. We can do complex skip patterns, randomization, grids, scales, multi-punch and single-punch formats, etc.

What does the deliverable look like?
- The tables are in MS Word format
- Responses down the side
- One question per page
- Banner points across the top

What's included in the tables I'll receive?
Answers to your questions among the total population and across 40 standard demographic banner points.

Can I include customized banners?
Yes, for a nominal cost.

Are the results representative?
In most cases, we can weight the data so it is representative of the U.S. general population.

How much does QuickQuery cost?
QuickQuery is priced on a per-question basis, and different types of questions cost different amounts:
- \$1,000 for multiple choice and open-ended questions
- \$1,500+ for grid-type questions
- \$1 per coded response
- \$100 per custom banner point

What are some examples of how I might use QuickQuery?
- Incidence testing
- Name tests
- Tracking studies
- Public opinion issues (e.g., mad cow disease)
- Evaluating product ideas
- Label testing
- Concept screening
- Awareness and usage studies
- Evaluating purchase intent

HarrisInteractive

MARKET RESEARCH

Harris Heritage. Interactive Power.

USA ATHENS 2004 OFFICIAL PROVIDER

www.harrisinteractive.com Tel 877.919.4765

objectives are stronger drivers of cost and speed than the medium employed. For less complex general consumer studies, online research may offer a faster, less expensive solution. However, for studies with highly specific or low-incidence recruiting criteria, or for those that target professionals, experts, or opinion leaders, we suggest that cost and speed are comparable across all methods.

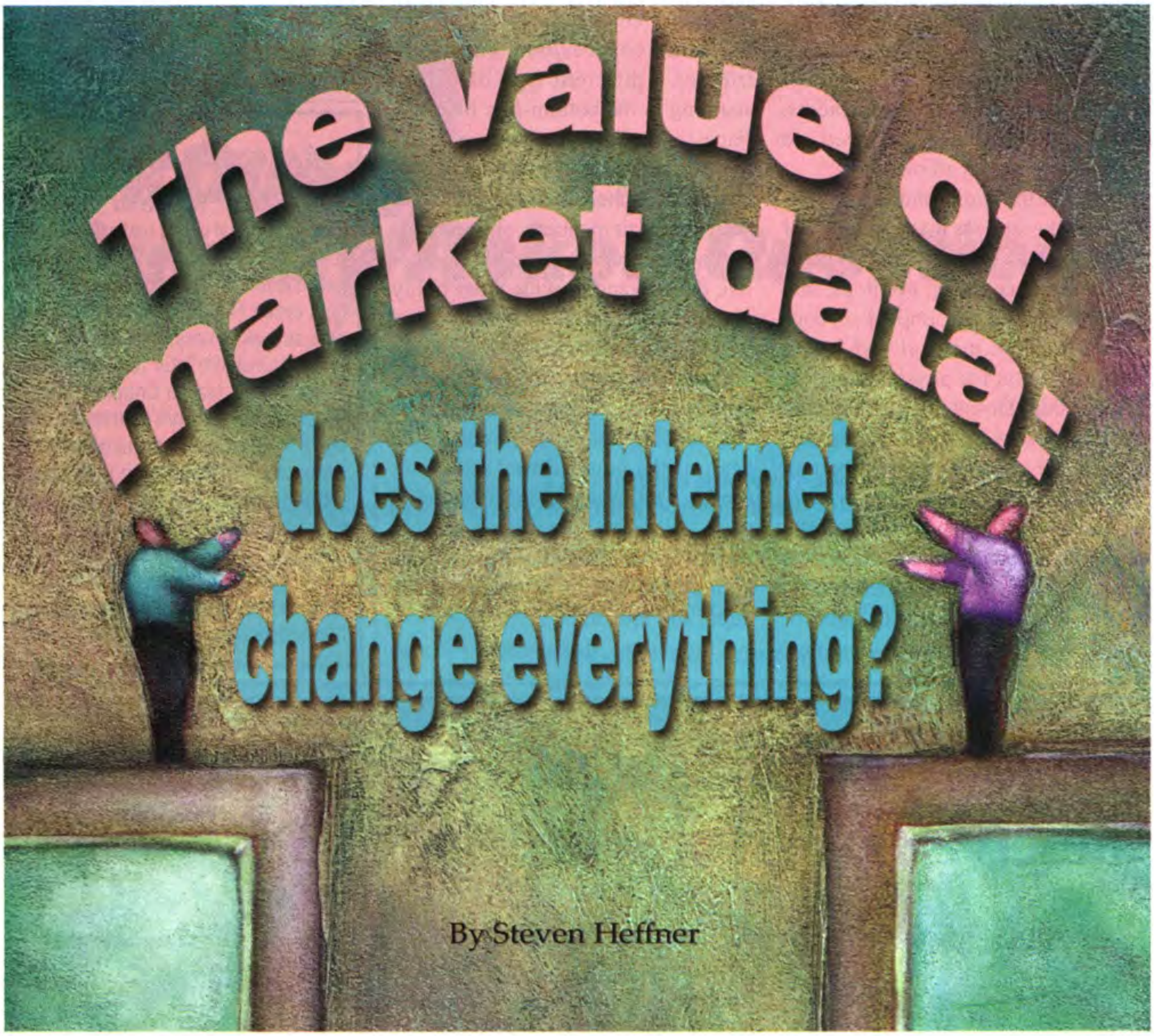
Perhaps the most interesting outcome of the study is that regardless of method, respondents overall revealed the same perceptions, opinions, and concerns about the impact of consumer-targeted medical and health information on the physician-patient relationship. Despite industry debate over the quality of findings from current online methods, it is important to remember that respondents want to be understood, regardless of the research environment, and they make the effort to communicate clearly. Aware that they cannot be seen or heard, online respondents adopt new ways to share tone of voice and feeling through capitalization, shorthand, punctuation, emoticons, and precise wording.

At the same time, although all these research methods ultimately lead to the same conclusions, each contributes a different type of understanding to the bottom-line findings. Face-to-face respondents employ more "storytelling" to describe and characterize their feelings and experiences. Participants in online asynchronous groups engage in provocative debates and provide more richly textured explanations of opinions and beliefs. The online synchronous method encourages intensely direct and lean communication; these respondents immediately cut to the heart of the issue at hand with utter candor. SMC observes that combining these qualitative methods can result in overall research conclusions and marketing implications of much greater depth and breadth.

Therefore, depending on the research objectives, target market under study, concept medium, and complexity of research scheduling, complementary pairing of face-to-face and online methods may offer research buyers and sellers the most efficient and effective way to gather information.

Research In Action

In research, H.J. Heinz Company asked kids what would make them want to eat more french fries. The result? A new line of Ore-Ida frozen potato products called Funky Fries, featuring five new shapes, colors, and flavors. The products include: Tater Tots with a hole in the middle (called Crunchy Rings); french fry flavors from sour cream and chive to cinnamon and sugar Cinna-Stiks; and Kool Blue french fries, which are sky blue in color. Pittsburgh-based Heinz started a year ago with 50-odd ideas (one rejected idea: Fruit Loops-flavored fries) and pared them, through extensive research and testing, down to five. (Associated Press)



Editor's note: Steven Heffner is acquisitions editor at Kalorama, an imprint of MarketResearch.com, Inc., New York. He can be reached at sheffner@kaloramainformation.com.

Regardless of your exact title and your exact industry, almost every one of us is in the information business. If you're in publishing like me, you're in the business of selling it. But even if you're developing it, processing it, or consuming it, you will agree with this simple proposition: information has value. And in the case of market research, information has a lot of value.

Because our business is packaging and selling information, we at Kalorama Information do a bit more obsessing over the value of information than most, but that value has implications for everyone in research. There are two basic ways to assign value to information: 1) you can ask how much it costs to acquire, develop, and publish the information, or 2) you can ask how much people will pay for it (i.e., what the market will bear).

Predictably enough, these two questions often have different answers, and balancing them is the trick. However, recently the difference between the two has grown dramatically.

The gulf between reality and perception

Here is the problem: In the past few years, as a publisher I have seen that the perceived value of information is falling rapidly because of the constantly rising tide of data available for free on the Internet. As an editor and researcher, however, I see that extracting real value from that sea of information is becoming more and more difficult. The widening divide between expectations of cheap, plentiful data

Advertisement

Consumers Brake For In-Store Studies

In the retail environment, shoppers aren't just recalling "why." Rather, they are driven by the "why" of that very moment. The shelf and shopping experience are the final purchase catalyst.

By William J. Hruby

Editor's note: William Hruby is a market research and advertising consultant with nearly two decades of packaged goods marketing experience.

The challenge for packaged goods marketers: the consumer in the aisle, at the shelf or register is at the intersection where packaged goods and consumer motivations converge full speed. 100% of all final buying decisions are made in-store. Yet research is most commonly conducted on-line, in malls, mail panels and other locations, far removed from the point-of-sale.

Go where the shoppers decide to buy. Consumers must be intercepted in the store where product A is selected over product B, where motivations are bright signals in the consumer's mind. Meet that same consumer at another location two weeks later, and it is unlikely they are able to remember their purchase decisions, awareness of brand options, motivations for purchase, etc. And certainly not with the same degree of accuracy as an interview conducted at the point-of-purchase. Further, they may not speak with you at all.

Participation is seriously slowing for traditional research methods. In Marketing Research (Spring, 1998), authors Bearden, Madden and Uscategui reported that the pool of qualified respondents is drying up. The, "Lack of representativeness resulting from refusals to participate . . . jeopardizes the accuracy of survey results."

Evidence suggests that the decline in participation rates is already occurring and may accelerate." This is part of what is driving the possibly unhealthy move of the research industry to the use professional respondents: "A tiny 4% to 5% of adults account for more than half the survey responses." (Bickart and Schmittlein, Journal of Marketing Research, May, 1999.) In addition, wave-off rates (shoppers who refuse to even be approached) hover around 90%. By contrast, in-store wave-offs typically run 30-50%. Research clearly seems more relevant and palatable to consumers at that point-of-purchase.

Three questions you should ask: According to Dr. Herb Sorensen of Sorensen Associates, market researchers must ask themselves three questions prior to going to field.

1) What information is needed?

2) Who has that information?

3) Where are they; and when are they most capable of providing the information?

For packaged goods researchers involved in concept, prototype and related phases of product development who rely on Product Guidance Research, the answers often point to in-store research. Sorensen Associates has over 40,000 retail locations available in the U.S., along with the technology to execute fieldwork in a few days. This infrastructure is at the foundation of the firm's reputation for conducting demographically structured studies at the neighborhood level.

Researchers now have new and better options for collecting consumer information - at the point of purchase.

and the truth of labor- and skill-intensive knowledge mining is creating somewhat of a crisis for the market research industry.

The conflicting value propositions are a concern for information vendors in particular but it also has implications for market researchers in general. It is most obvious to us in the syndicated research sector; we're the canary in the coalmine because we're exposed to direct market pressures. However, this gulf in expectations has implications for in-house researchers and consultants too, as the perceived value of their work product changes within an organization.

Already in the past year, several major life science companies have downsized or even liquidated their in-house market research staff, feeling budget pressures. One can only assume that the misperception that market information is "cheap" is also a big factor. In the information business, the law of supply and demand appears to be distorted, and researchers and analysts are finding themselves on the wrong end of the lens.

Of course, you and I know that finding meaningful information on the Web is, indeed, more difficult than one thinks. Separating the wheat from the chaff turns out to be, in many cases, as labor-intensive and more skill-intensive than harvesting the wheat the old fashioned way. Here are some of the reasons why…

Herding information: "free" is a deceptive word

How many times have you heard, "But most of that is free on the Internet"? Whether you're preparing a report or justifying your bill to a client, the notion that because it is "on the Internet" it is available and thus didn't require finding or gathering can be a problem.

Finding the information is the first step and not always the easiest. Knowing where to look requires a lot of experience. There are some secondary resources to help — MarketResearch.com publishes a guide called *Finding Market Research on the Web*, which documents some of the best methods and sources, for example — but even guides cannot replace the applied expertise and experience of a seasoned researcher.

The second step is collating the information. Company product information, prevalence and mortality data, financial reports, patent and regulatory filings — all of these are, indeed, part of the public record and/or free for the asking. Does that mean a single file containing of all the patent filings of note in transdermal drug delivery coupled with financials on the competitors in the sector is not of value? On the contrary, this type of editorial data organizing is one of the most valuable things a researcher can create.

Filtering information: who said that?

Even when a piece of market information seems easy to find, the reliability of the source is a serious concern. It's one thing to get bad driving directions from the Web, it's another to base an important strategic decision on dated, skewed, or outright faulty data. Evaluating the source requires that you know the answer to two basic questions:

• Do they know what they're talking about?

• Are they a trustworthy reporter of the facts?

The first one is difficult, but most researchers know by now who and who is not a reputable vendor or record-keeper. The second is a little trickier because it spans the continuum from outright fraud to a little "harmless" spinning. Although lying is a concern, the first question should weed those out. The more prominent concern is the source's ulterior motive in shading or even lying about a data set. Investment banks and other equity analysts are prolific producers of market research reports, but their revenue forecasts are often inflated when it comes to industry sectors they're focused on and invested in. They have a clear conflict of interest. They're not lying, they're just optimistic — very optimistic.

Evaluating the source also requires that you really know the source. Just as the number of vendors and outlets has seemed to increase, the number of true sources has shrunk significantly. When you purchase a report from Reuters on a pharmaceutical market, quite often the data reported are cited as being from Datamonitor, which in turn be from IMS. In fact, it's relatively easy to see the same numbers pop up for a dozen apparently different sources, because they are all regurgitating a single source — one your organization may already have access to elsewhere.

Digesting information: what are they really saying?

Finally, you must ask the trickiest question: Do you know what they're talking about? Do you know what the data they're reporting really mean? Here is where you must understand the methodology of the data collection.

A drug company's annual report, for example, may pin the potential market for a soon-to-be-released drug at $3 billion. Do you know how they came up with that number? Let's say it's an estimate of unmet need. Is it reasonable to assume that the drug will make it into the hands of everyone who needs it, and that every one of them will be paying the drug company's asking price? I don't think so.

How about reported revenues on existing products? One former big pharma employee told me that they used to multiply the number of pills shipped by an arbitrary "cost per pill" to arrive at that number, even though some of the pills were free samples, some were sold at deep discounts to certain distributors, some were sold overseas at yet another price, etc., etc.

Less sinister, but perhaps more dangerous for the unsuspecting researcher is the misunderstanding of the information from large databases. The danger isn't that these sources are trying to spin the information like a drug company or an equity firm, but rather that the information is only as good as the method of collecting it.

Take, for example, statistics from the National Center for Health Statistics or from the Healthcare

Financing Administration. These numbers can be very deceptive if you don't know where they come from. Not too long ago, a customer of ours was looking for the number of stents placed in coronary arteries in the United States. The government had a number that was nearly half that of some industry analysts. How could that be? Well, the government number was based on hospital discharge surveys, which statistically sampled ICD-9 codes (used for reimbursement purposes). Fair enough, but what one needs to know is that only the primary condition was coded; if the stent placement procedure was an also-ran, it was not included in the count. Also, if the patient had more than one stent inserted, this was counted as one. Add these basic flaws to the geographic variation of the sampling and the errors compound.

The same can be said for some pharmaceutical industry databases such as IMS. You have to know how the data are collected, and you have to account for the statistical methods used to arrive at the numbers. Is the information useful? Yes. Is it all you need to know? No. Numbers have a pedigree, and understanding that pedigree is the key to using them correctly.

Evaluating information: so what is it worth after all?

All these research steps make it clear that information is not at all getting easier to acquire and use — quite the contrary. Even when one finds relevant information from a reputable source, it takes expertise to evaluate what the source is really saying, so that it speaks in harmony with your other datasets.

The unregulated free-for-all that is the Internet has made tons of market data easy to come by, but good market research harder to come by. It is actually more difficult to find the useful information from reliable sources now that the number of vendors and outlets has grown beyond the proverbial haystack while at the same time the number of true primary sources has dwindled.

For example, our firm has seen the price of life science market research change quite a bit over the past few years. A few publishers have held the line on pricing, whereas some have increased their prices by more than 100 percent. During the same period, we've seen a fourfold increase in the number of life science research vendors in our database. More supply and still a higher cost! The reason is quite simply that meaningful market research is getting more and more difficult to glean.

In the end, the story is the same: market information is not cheap, and the advent of online sources of information has not made it less expensive to acquire. Indeed, it has made it more difficult to get solid, reliable information and to truly understand its implications. The perception that the online world represents a well of cheap, plentiful data is simply wrong, and the role of the experienced researcher with a critical eye is still very much in need.

Diversify your market share

Pharmaceutical companies should incorporate ethnic marketing into their business strategy

By Nancy Lang

Editor's note: Nancy Lang is principal of Cultural Horizons, a Kansas City, Mo., research firm. She can be reached at 816-941-7000 or at culturalhorizons@aol.com.

The United States is rapidly becoming a diverse nation. Between 1990 and 2000, the number of Asian-Americans, Latino-Americans, and African-Americans grew at a rapid pace — 42 percent, 39 percent, and 14 percent, respectively. In comparison, the U.S. white population grew a paltry 7.3 percent during the same period. Fifty years from now, the United States is projected to look like this: one-half whites; one-fourth Latinos; and one-fourth Asian, African-American, and other minorities. Residents currently considered minorities will become the "emerging majority." In California, New Mexico, Hawaii, and Washington, D.C., nonwhites have already gained majority status. More importantly, however, is that the largest metropolitan areas in the U.S. — those found in states like California, Texas, Florida, Illinois, New Jersey, and New York — are home to 67 percent of all immigrants. Market research analysts who scan the environment to uncover the needs of these emerging majority populations uncover opportunities to develop added value and differentiated tactics to the organization's business plans.

Increasing buying power of the emerging majority

As these "emerging majority" populations grow, they play an increasingly important role in the U.S. economy. Today, ethnic minorities have an impressive \$1.1 trillion in personal buying power. Recent research indicates that Asian-, Latino-, and African-Americans are increasing their household incomes at a rate three times faster than whites while simultaneously obtaining mortgages,

becoming owners of small businesses, and gaining higher levels of education and professional opportunities.

A quick glance at available data shows:

• African-Americans are outspending their white counterparts in key purchases such as new cars, mortgages, and groceries.

• Between 1994 and 2000, the number of Latino residents in the U.S. earning more than $50,000 grew by 128.6 percent, placing their purchasing power between $450 billion and $650 billion. By the year 2020, it is expected to top $2 trillion.

• The disproportionately large Latino youth population — 25 percent of all four- and five-year-olds in the U.S. are Latino — is certain to fuel future buying power even further.

As the buying power of emerging majority populations rises, so too will their access to a variety of products. One untapped area which will be the focus of the remainder of this article is the health care industry. As their numbers and economic influence grow it follows that these groups stand to offer significant opportunities to the health care industry in general — and the pharmaceutical industry in particular.

These emerging ethnic groups have many unique needs and concerns. A few leaders in the pharmaceutical industry have begun to establish dialogues with these groups in order to initiate culturally sensitive strategies that address these unique needs. This exploration is limited as the pharmaceutical industry must first surmount perceived barriers to culturally-targeted marketing.

Perceived barriers to culturally-targeted marketing

When asked whether they budget for strategies and tactics directed at ethnic markets, pharmaceutical marketing managers seldom reply yes. Some of the common concerns include:

• Consumers still have to get a prescription from the doctor and general market campaigns probably reach bilingual patients who already have insurance.

• The product/brand does not have a budget for ethnic marketing.

• It is difficult to measure return of investment among the ethnic markets because actual prescription data is currently not segmented by ethnicity.

• "Our strategy does not include a direct-to-consumer campaign."

• "We are concerned that culturally sensitive marketing strategies may cost too much."

What is not acknowledged is the fact that very modest changes in marketing strategy can have a large impact on these populations.

Employing a diverse workforce

Given the global economy and our "international" domestic market, companies that incorporate cultural sensitivity to products and services as part of their overall business strategies will achieve a sustained competitive advantage. The companies that most effectively incorporate cultural sensitivity into their products are those that recruit, employ, and train a culturally diverse workforce. It makes sense that the marketing professionals who are best able to produce strategies that will resonate with ethnic consumers are those who think like them. For example, IBM has employed this strategy, with strong results. "Global companies like IBM won't do very well for very long if their employees all look alike. Diversity of thought and culture and geography and race and gender enables us to bring the best solutions to our customers," says Ted Childs, vice president of global workforce diversity for IBM.

Training employees in cultural competence to leverage diversity

In addition to hiring culturally diverse employees, companies can train employees to successfully implement culturally relevant strategies and tactics. For instance, one leading U.S. pharmaceutical company had its sales representatives provide targeted physicians — those with a high percentage of Latino patients with diabetes — with information on a drug used to treat diabetes. In addition, these sales reps gave the targeted physicians, nurses, and diabetes educators culturally relevant tools to pass on to their Latino diabetic patients: a cookbook offering traditional Latino recipes prepared in a health-conscious manner; a Spanish-language videotape about how to control diabetes; and a Spanish-language brochure detailing the effects of the prescribed drug.

The initiative proved favorable. The attitudes and behavior of those physicians who were detailed on the Hispanic initiative (based on their recall of the visits) were much more favorable towards the company and product prescribing than their non-detailed counterparts. Detailed physicians reported higher company and product level scores in relation to manufacturer awareness, product prescribing, attribute ratings, and program awareness. Sales representatives gave the company positive marks for providing culturally relevant tools to share with targeted physicians.

Seeking culturally competent business partners

Pharmaceutical companies looking to partner with managed care organizations (MCOs) will be interested in the following example of a successful initiative aimed at strengthening the relationship between primary care providers and their patients in a Latino community.

White Memorial Medical Center (WMMC), serving a California community that's 90 percent Latino-American, established a family practice residency program which trained residents in how to care for their patients in a culturally competent manner, specifically as it applied to their Latino patients. Since its inauguration in July 1988, the WMMC Family Practice Residency Program has developed and strengthened ties with the greater East Los Angeles community.

The Residency Program is the centerpiece of the Southern California Minority Medical Education and Training (MINMET) Program, located in the heart of East Los Angeles. The Residency Program's first priori-

An ethnic marketing action plan for pharmaceutical firms

When conducting situation analysis and a SWOT (strengths, weaknesses, opportunities, and threats) analysis of your business plan, remember to do the following:

• Explore implications of demographic changes (regional and national).

• Segment patient population by ethnicity.

• Identify differences in disease incidence.

• Determine if your product treats a condition in which a "health disparity" exists between ethnic and general populations. For example, is mortality different among ethnic groups in your disease category? Are there more complications compared to the general market?

• Examine the growth patterns of your customer base.

• Find out from physicians and managed care organizations what issues they encounter in treating an increasingly diverse population. Then, identify challenges and opportunities your company can pursue.

• Keep abreast of cultural competence accreditation requirements with NCQA and HICFA.

• Determine the role of employer organizations in leveraging cultural competence requirements.

• Learn ethnic patients' language preferences and determine their level of understanding of their condition.

• Find out what your competition is doing to serve the needs of the "emerging majority."

After identifying areas of opportunities, conduct exploratory research to validate the SWOT and develop further ethnic and cultural opportunities.

ty is to train young physicians to practice in any setting. The second is to create a residency responsive to the needs of a multi-cultural, predominantly Latino community. Many of the residents trained in cultural competence stayed with WMMC after completing their residency, joining the hospital's primary care group, the Family Care Specialists Medical Group. WMMC credits the infusion of cultural competence into residency training with the fact that 20 percent of the hospital's patient care revenue now comes from that recently established program and its graduates who have elected to establish practices in the hospital's service area.

Bridging language barriers

Reaching patients through their native language and with their cultural assumptions in mind can go a long way toward winning their confidence. Recent research across several therapeutic areas has shown that:

• The culture and language of the health care professional play an important part in making patients feel comfortable and confident. A cultural or language barrier can affect patients' acceptance of care and their willingness to comply with medication requirements.

• Cultural beliefs can influence patients' understanding of the causes of their illnesses. This, in turn, has an impact on their final health outcomes.

• More complications and higher mortality rates for certain diseases within certain populations might be due to how those cultures view the diseases and what behavior is acceptable in dealing with the illnesses. It is important to find out how knowledgeable patients are about a disease and to understand cultural myths connected with it.

• Groups that speak little or no English have trouble understanding medical information presented in English. Increasingly savvy consumers, however, wish to be well-informed and are often frustrated by the lack of information available to them in their language of preference. Also, information that is translated literally into the target language might not be understood by patients due to regional language differences, and might, in fact, be inaccurate or even offensive.

In order to understand and address all of these issues, pharmaceutical companies and managed care organizations should strive to explore patients' cultural attitudes in depth. Reaching patients within their culture and language will facilitate discussion and promote understanding of their unique concerns. Addressing those concerns can then make a difference in how a condition is managed, and can motivate patients to change their behavior to improve their health.

Integrating multicultural marketing on an ongoing basis

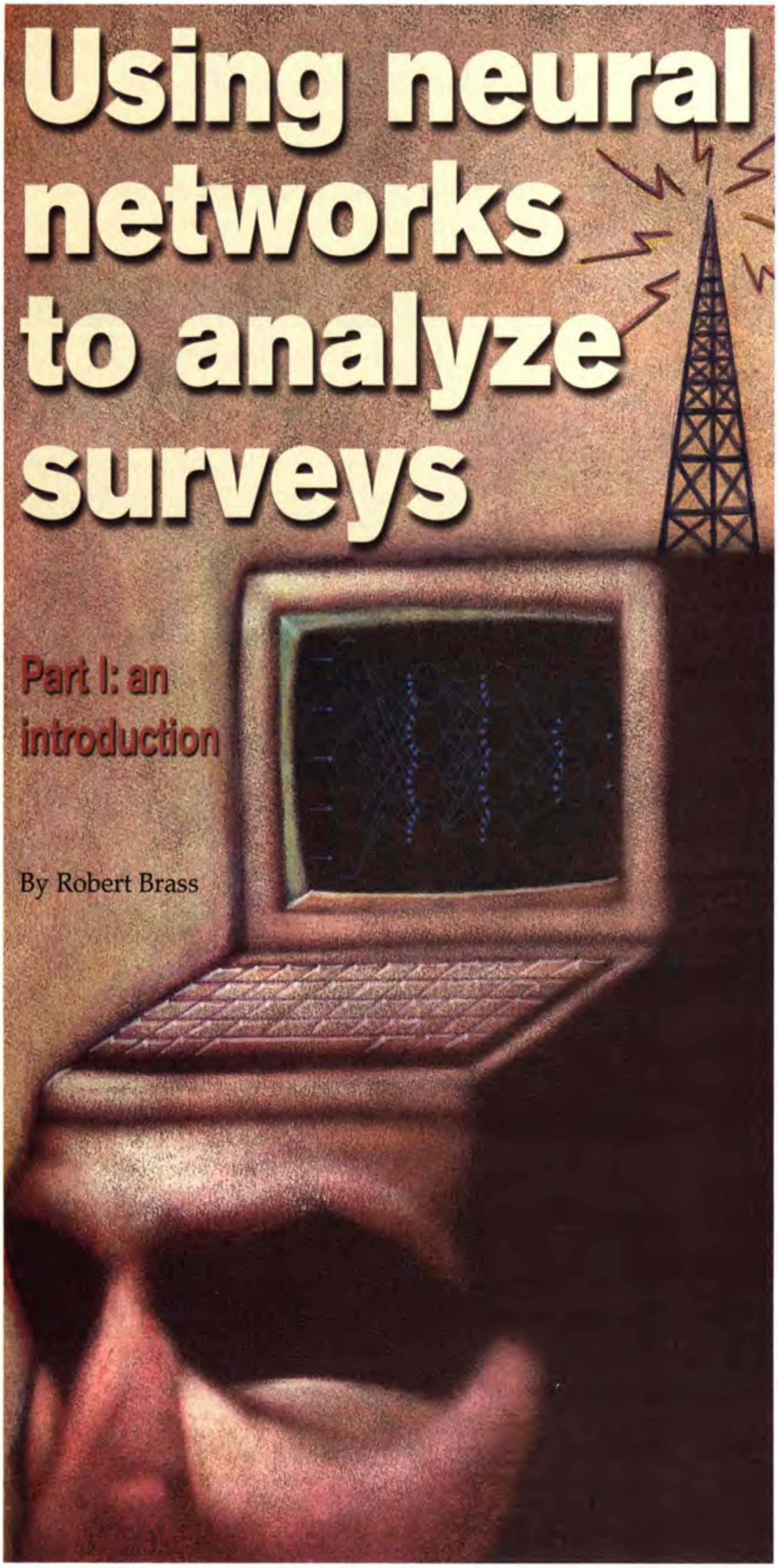
Pharmaceutical companies, or any company wanting to reach out to ethnic markets, should incorporate cultural sensitivity to products and services by evaluating multicultural issues in a continuous and integrated manner. Rather than viewing the multicultural market as a standalone opportunity, the most successful — and responsive — players in the arena will integrate multicultural marketing principles into their ongoing dialogue with patients, physicians, managed care organizations, and employer coalitions. There are specific approaches to explore issues that address the growing needs of the diverse patient population and the challenges they represent to physicians and managed care organizations that serve them (see sidebar).

Ethnic marketing opens up a whole new set of opportunities for pharmaceutical companies that take the time to understand the implications of the undeniable market trends reshaping the nation. Seizing these opportunities will, however, require an overall shift in how marketing staffs think about their markets. That process starts with including "emerging majority" populations in the company's marketing plan.

Using neural networks to analyze surveys

Part I: an introduction

By Robert Brass



Editor's note: Robert Brass is president and co-founder of Development II Inc., a Woodbury, Conn., research firm. He can be reached at 203-263-0580 or at bob@development2.com.

This is the first of three articles aimed at describing a practical "how to" methodology for using neural networks as a technique for analyzing survey results. It is based upon eight years of experience in the development and use of this process. The reason for writing this article is to raise the awareness of the value of neural networks and their exceptional accuracy and hopefully to encourage others to add their ideas in furthering neural networks' evolution for use in market research. The approach of this serialized article is to present a mixture of theory, metaphors, and practical examples that will illuminate the subject in an interesting and comprehensive manner.

This first article will focus primarily on the fundamentals and background of neural networks, specifically as they are used as an analytical tool. The second article (appearing in the July/August issue) will leverage the example introduced in this first section and follow it through the development of multiple neural networks. The final article (October) will focus on the selection process to identify the "representative" neural network, how then to use it as an analytical tool and finally, how to present the results in an understandable and comprehensive fashion.

What is the problem to be solved?

The typical survey accumulates data to describe what people think. Frequently, however, the real value comes from understanding why people think the way they do. This allows answers to questions such as:

• What is the most effective way to improve customer or employee satisfaction?

• Why do customers buy a specific product?

• Why will a particular candidate appeal to a large group of voters?

The specific use of neural network analysis described in this article focuses on the "why" aspect of the analysis.

Costs and other elements of practicality usually limit the number of respondents to most surveys to less than 1,000 — more often less than 500. This means that any process for evaluating surveys should be structured to accommodate that limitation. This definitely influences the methodology for using neural networks, as will become obvious in the ensuing discussion. If, however, the total responses to a survey were in the thousands, some of the steps described could possibly be eliminated. This also will become obvious in the description of the analysis technique.

Why consider neural network analysis?

Human decision processes typically occur with incomplete information, are complex, nonlinear, and highly influenced by subtle circumstances. Each element involved in the decision tends to have a uniquely different relationship with the process and there is usually a high degree of correlation among many of the constituent elements that form a decision. Very seldom are they all independent of each other. These realities unfortunately do not bode well for the traditional methods of analysis.

Multiple linear regression for example, assumes linearity, and inputs that are independent. Nonlinear regression usually starts with the assumption that each variable has the same functional relationship to the output and does not accept input correlation graciously. Regression also requires considerable experience to master. Even then it is quite limited and typically requires interpretation of the results.

Neural network analysis simplifies or eliminates many of the shortcomings of regression. Where traditional statistical models require well-defined or at least partially defined domains to be effective, neural network models can handle highly unstructured data, similar to the mode of the human thought and decision processes.

Some may argue that neural networks are too abstract and not as reliable as regression, yet Kuan and White (1994) demonstrated that multivariate linear regression is a special case of a neural network model.[1]

In attempting to characterize priorities, another favorite technique is to ask the respondent to quantify importance. This, however, is fraught with issues. Consider the example of an evening at a restaurant. The respondent could be asked to rate the food, the company, the service, the atmosphere, the time to wait for a table, the selection from the menu, the price, etc. In addition he or she could be requested to estimate the importance of each in influencing their overall opinion of the evening. It could have been "excellent," "average," "fair," or "poor" or some other metric of measurement. It seems rational to assume that this is a very complex process. A mediocre meal with an enjoyable companion may be seen as an "exceptional" evening, while a great meal with rude service could be viewed as "poor." In fact if the dining experience was seen as being "excellent," the decision process is probably considerably different than if the evening was a disaster and considered "poor." The decision process is complex, certainly nonlinear and very dependent upon the circumstances; consequently personal ratings of importance may be based upon different evaluation criteria.

Finally there is the problem of applying quantification (a number) to a literal description to allow a realistically relative rating to be evaluated. If "exceptional" is a 10, is "average" a 9 or an 8 or even a 5? The reality is that the substitution of a number for a literal can make a fundamental difference in ranking on a numeric scale. Since the choice of a scale is just a guess, this adds another dimension of plausibility in prioritizing elements by rating importance.

Neural networks offer another option. They are part of artificial intelligence technologies and operate as a simplified computerized model of the neural architecture of the human brain. Just as the human brain "learns" from repeated exposure to neural stimuli (or recognition of patterns — factual and behavioral), the neural network is also a pattern recognition system. Existing applications of the technology include models that have learned to speak, fly airplanes, detect fraud, identify galaxies, predict the outcome of horse races, predict future trends in commodity prices, and to diagnose illnesses.

In the application for analyzing surveys, Hornik et al. (1989) noted that the non-parametric nature of neural network models makes them particularly suited for social science data, where the assumptions of normality and linearity cannot be assured.[2]

The history of neural networks as a method for survey analysis

Let's be perfectly honest: Neural networks have a very poor reputation as a methodology for analyzing surveys. Historically, this impression is quite justified. Some of the problems stem from the difficulty in learning the process or how to interpret the results, but most of the negative reactions occurred as a result of incorrectly applying the technology. There is a basic reason for this inappropriate usage.

The most frequent use of neural networks is to develop a model. Used as a model, the goal is to predict an output given any set of inputs. When, however, it is used as an analytical tool, the objective is to find the effect that any single input has on the output(s). The problem arises since two neural networks developed from the same data and trained in the same way, with similar statistical assessments, can function almost identically as a model; however the impact that any single input has on the output can be significantly different. This is the rule, not the exception and this is also the fundamental reason that most attempts to use a neural network to analyze a survey have been unreliable.

As will become apparent in this and later parts of the article, circumventing this debilitating issue requires a change in the approach for creating neural networks. It also needs a different evaluation technique for identifying the optimum network to represent the decision process captured by surveys. In summary, employing a neural network as an analysis tool demands a totally different set of assumptions and processes than building a model.

Our experience with neural network analysis

In the late '80s, the emergence of a practical method for developing neural networks based on "back propagation" seemed to offer a promising methodology for addressing the shortcomings of the current methods of analyzing surveys. It was apparent that it could accommodate the non-linearity of the human decision process. As many attempted to use it, it became apparent that the results obtained were frequently illogical and clearly incorrect. After the initial enthusiasm it was hastily abandoned.

We began using neural networks to analyze surveys in 1994. The memories of the overstated potential of artificial intelligence in the '80s made our clients understandably skeptical. We tried various strategies including making up different names so we did not have to mention the "n" word. We also had some very interesting discussions with some very competent statisticians who were employed by our clients; their kindest reaction was a mild questioning of our sanity. Relief came from a surprising source: data mining. Since business tends to have love affairs with the latest theories, and neural networks were part of data mining, legitimacy arrived on a silver platter in about 1997.

To progress from the neural network basics to an effective analysis tool took several years and a lot of hard work that included several dead-ends. One event in particular stands out as symptomatic of the effort. To address a particularly difficult problem we rented a half a dozen 386's and let all of them, plus a few office computers, run over a three-day weekend to obtain the analysis we needed. We left the office with fingers crossed, hoping that there would not be a power failure; there wasn't and we obtained the results we needed. Fortunately, contemporary computers allow the same level of calculations to be completed on one machine in less than an hour, but for several years working with neural networks was more of a marathon than a sprint.

We can now attest from our experience that the correct use of a neural network as the basis of an analysis tool for surveys is extremely powerful and accurate. We have employed this technique since 1994 and have successfully used it for clients several hundred times. We have sufficient long-term relationships with many of those clients to be able to track the results of recommendations developed by neural network analysis and can say without qualification that the actual events occurred almost precisely as predicted. It is now our standard process for all of our survey analysis.

Neural networks 101

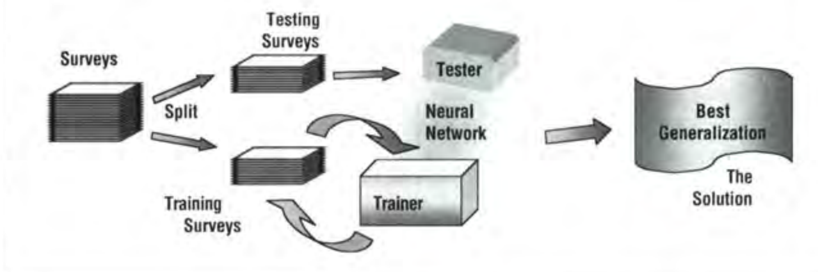
While the technical details of neural networks tend to be more than most want to know, a basic understanding is very important before attempting to use it as a survey analysis tool. The easiest way to gain a comfort level is to relate its learning strategy to a common occurrence that many of us have had or heard about. Perhaps you or your children learned multiplication tables with flashcards. These had one multiplication "fact" printed on each of 100 cards, but not the answer. Someone would show them to you one at a time. You had to initially guess the answer and if you were wrong, you would be told the correct result. You probably went through them many times before you could respond to every one correctly.

At first, you looked for the shortcuts. The zeroes were easy, so were the ones and the twos. You understood those patterns almost immediately. Probably the next numbers you learned were the fives or the nines. You learned the various tricks. The twos for example were the same as an addition of the number to itself. The nines were a little more difficult, but if you took the number that was to be multiplied by nine and subtracted one from it that was the first digit. The second digit was the difference between nine and first digit.

You generalized. It was certainly easier then memorizing and if the early results inevitably indicated that you had more to learn you would go back to the flashcards again and again until you had finally figured out all 100 facts.

When used to analyze a survey, the neural network does the virtually same thing but with a slight twist. The survey results are randomly divided into two groups (Figure 1). One group is the "training" group while the other is the "testing" group. The input elements that could influence an outcome are presented to the neural network. Initially, it "guesses" the outcome or output (for example the overall impression of the dining experience). If it is wrong, it "nudges" its internal logic so the "guess" is closer to the right answer.

Figure 1

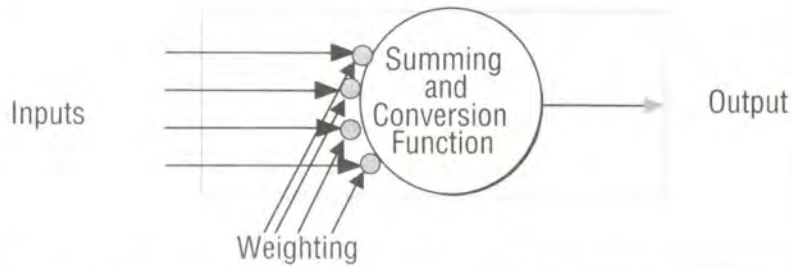


The normal training strategy is to stipulate the degree of error that is tolerable and not modify the network unless the actual error exceeds that limit, thus it will review this training group perhaps 20 times, nudging when necessary. Then, to evaluate the state of its learning, it takes a test. It reviews the testing group one survey at a time and keeps score of the correct answers and maintains the key statistical measurements of all of the answers. It continues to alternate between training and testing while keeping score of the results each cycle.

With continued training, the test scores usually rise for a while. Then it begins to memorize the training group. The result is that the trained neural network begins to make more errors on the testing group as memorization replaces the ability to generalize. The goal is to stop the training when the inherent patterns in the survey results have been maximally generalized and before the neural network shifts to a memorization mode.

The computer program that forms the basis of the neural network is constructed from a number of simulated neurons, similar to the neuron in the human brain (Figure 2). Each of these "artificial neurons" is a processing unit

Figure 2



that mathematically calculates the weighted sum of the inputs to create an activation level which is then passed through a transfer function to create an output. These artificial neurons are then combined into fully interconnected networks consisting of three classes of layers, the input, the output, and the hidden layer (Figure 3). During the training process, the strength of an input to a neuron (called the weighting) is nudged positively or negatively depending upon the error in the output. This cumulatively develops the logic of the network.

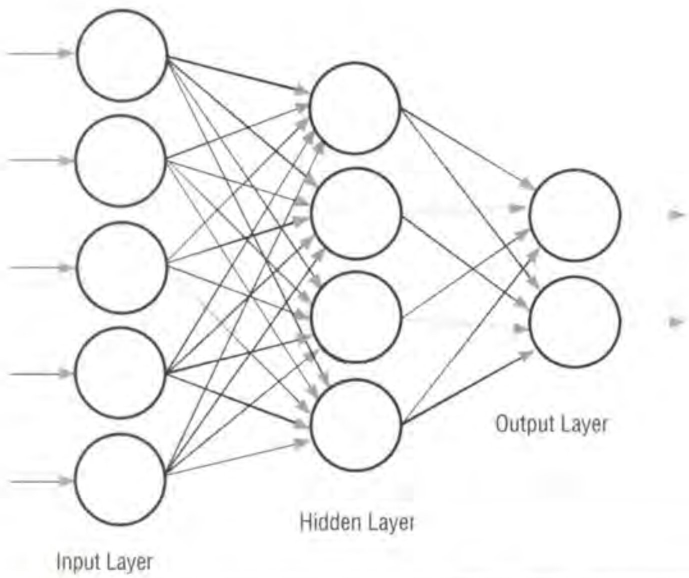
Its intelligence is related to the number of artificial neurons and to the degree of interconnection. The number of neurons in the input layer is equal to the input elements and thus fixed. The output consists of the dependent variable(s) and is also fixed. There might be one output, which is normal for survey analysis, two outputs as illustrated in Figure 3, or even three or more. The major variability in the network, therefore, lies in the hidden layer(s). This can vary in both the number of neurons and the number of layers. In practical applications, however, two layers tend to be the maximum (Figure 4) and one typically suffices. Also, as a rule of thumb the number of neurons in these hidden layers is usually less than the number of input neurons when it is used for survey analysis.

The important conclusion from this discussion is that there are several parameters that can be altered in combinatorial sets to develop different neural networks from the same data. The intent of creating a multiplicity of networks is to optimize the chance that the "most representative" one is included among those that were trained. The identification of this specific network among others is the critical step in analyzing a survey. It should be noted that the representative network is rarely the "best" network in terms of statistical accuracy. The variables that determine the development and variability of networks are:

1. The architecture of the neural network (the number of hidden layers and the number of neurons in each of the layers).

2. The training strategy (the degree of error that is permissible and the amount of adjustment to be made if the error exceeds the limit).

Figure 3



3. The order of the training group (alternative sequences of the training deck can create significantly different networks).

4. The division of the training and testing surveys (the division of the surveys into two groups).

This last variable, the split of the training and testing decks, is extremely critical. Each time the survey results are divided into those two groups, a bias is most likely interjected into the resulting neural network. This is simply due to the natural statistics of small numbers. Therefore, a relatively large number of separate segmentations and resulting networks are required to increase the likelihood that a representative neural network can be created and then identified. The process for selecting the optimum network will be described in the next installment of this article.

An example

To make the acquisition of knowledge less painful, we will use an example to illuminate each step of the way. Consider the following:

A growing company provides repair service for Internet servers and would like to insure that they maintain a high level of customer satisfaction. A customer satisfaction survey has been designed to be given to each customer after a service call. The goal is to quantify and prioritize the impact that eight specific elements of that service call have on overall satisfaction. The eight elements are:

1. The ease for the user to initiate a request for service.

2. The time for the service representative to call and set up an appointment.

3. The time it takes for the service representative to arrive.

4. The conduct of the service representative during the service call.

5. The service representative's effectiveness in informing the user about the repair.

6. Communication from the service representative after the repair has been completed.

7. The ability to fix the problem on the first try.

8. Responsiveness of the service representative to requests during the service call.

When the survey was tabulated there were 920 viable results, grouped into three segments: 86 percent were Totally Satisfied Overall, 10 percent were Somewhat Satisfied Overall and 4 percent were Dissatisfied Overall. Since the goal is to quantify the sensitivity of the eight elements on their effect on Overall Satisfaction, the first rule of thumb is: You should approximately balance the survey segments to optimize the detection of sensitivities.

It is tempting to use all 920 respondents, however the Totally Satisfied segment would tend to drown out the Somewhat Satisfied segment. The Dissatisfied segment, at only 4 percent, will be overwhelmed by the other two segments and thus any results for this particular group must be viewed with caution.

From a corporate strategy viewpoint, the major opportunity is to encourage the Somewhat Satisfied Customers to become Totally

Figure 4

Satisfied. As a result, a random group of 104 Totally Satisfied survey respondents was chosen from the 920 originals and combined with the 92 Somewhat Satisfied and the four Dissatisfied. This total of 200 was selected to observe the second empirically-derived rule of thumb: The minimum rational number of survey respondents for a neural network analysis is 200.

The reasons for this minimum are somewhat involved but relate to the number of interconnections internally between "neurons" in the neural network. This brings up another limitation that is expressed in the third rule of thumb: The maximum number of inputs for a neural network survey analysis is one-half the square root of the number of survey respondents used.

It becomes immediately apparent, given these rules of thumb, that there is a problem with the number of respondents that can be used (200) and the number of elements that need to be evaluated (eight). One half of the square root of 200 (number of surveys to be used in the analysis) rounds to seven, but there are eight elements to be evaluated. A gap is quite typical in that the number of inputs is almost always much greater than the allowable number. The method of working around this issue is the first critical step in using neural networks for evaluating surveys. This will be discussed in the next article.

These "rules of thumb" were developed over several years by evaluating thousands of different alternative cases using neural network for analysis purposes. They are based upon establishing criteria that will assure a robust and relatively accurate result. There are situations where these limitations have been conservative, but on balance these are appropriate.

Valuable method

Neural networks, if used judiciously, can be a very valuable method for analyzing surveys. It is a practical way to accommodate the inherent nonlinear process we all use for decision-making. In addition, the correlation that often exists among many survey questions which impact a decision is not an obstacle for developing a viable network. The current lack of use most likely stems from a basic misunderstanding or problems that have occurred with it in the past.

The second article will develop the details of the process for the preparation of the data for analysis, the building of multiple neural networks, and the method of selecting the most "representative" network for analysis.

References

[1]Kuhan, C. and White, H. "Artificial neural networks: an econometric perspective." *Econometric Reviews*, 13 (1): 1-91 (1994).

[2]Hornik, K. Stinchombe, M., and White, H. "Multilayer feed forward networks are universal approximators." *Neural Networks*, 2:359-66 (1989).

QuickLink

To read Mike Fassino's 1997 series on neural networks, visit www.quirks.com and enter Article QuickLink number 226 ("Neural networks: understanding back propagation"), 256 ("Neural networks pt. II: unsupervised learning neural nets"), and 243 ("Neural networks pt. III: using the past to forecast the future").

Research Industry News

continued from p. 15

Group, will join the NetRatings management team reporting directly to William Pulver, chief executive officer, NetRatings.

Schaumburg, Ill.-based **ACNielsen** U.S. has acquired complete ownership of the multi-channel alcohol beverage information services that were previously owned by a joint venture with **Adams Business Research**. The services, marketed under the name LiquorScan, are now fully owned and operated by ACNielsen.

Aegis Communications Group, Inc., Irving Texas, has sold the business and assets of **Elrick & Lavidge**, its Atlanta-based marketing research division, to a wholly-owned U.S. subsidiary of U.K.-based **Taylor Nelson Sofres plc**. The business will become part of the TNS Intersearch family (TNS). Elrick & Lavidge revenues in the year ended December 31, 2001 were $22.9 million and pro-forma net assets at that date were $2.6 million. In a press release, Herman M. Schwarz, Aegis Communications Group's president and chief executive officer, said, "In our review of Aegis's position in the customer relationship management sector, we concluded that the core research offerings of our marketing research division were no longer strategic for the company. It also has become increasingly clear that the clients and employees of Elrick & Lavidge are best served with a company concentrated on marketing research. Our strategy is to focus on our core competency of delivering customer interaction solutions. To this end, the Data Analytics Group that was housed in Elrick & Lavidge has not been included in this transaction and is now part of the core Aegis offering." Key personnel from Elrick & Lavidge will be offered positions with TNS Intersearch. Marketing research operations will be continued in Atlanta; Kansas City, Kan.; Westchester, Ill.; Clarksville, Tenn.; and Cincinnati but will formally become part of the TNS Intersearch family.

U.K.-based **Millward Brown** has acquired the **Irish Marketing Surveys (IMS) Group**. Founded in 1963 by the late John Meagher, the group operates three major companies: Irish Marketing Surveys (to be rebranded Millward Brown IMS) and Lansdowne Market Research, both based in Dublin; and Ulster Marketing Surveys (to be rebranded Millward Brown Ulster) which is Belfast-based. The group employs 130 people full-time in Dublin and Belfast. The existing structure and local management personnel of the IMS Group will continue unchanged.

Separately, Millward Brown has acquired Westport, Conn.-based research firm **Greenfield Consulting Group**. Founded by Andy Greenfield in 1983, Greenfield Consulting had annual revenues in 2001 of $13.5 million. Greenfield will remain as CEO of Greenfield Consulting, a Millward Brown company, reporting to Eileen

Campbell, Millward Brown North America's CEO. All other Greenfield Consulting management and staff will be retained and will continue to serve their existing clients.

Indianapolis-based **Walker Information** has announced **Smartketing** as the newest member to its global network. Founded in 1993, Mexico-based Smartketing conducts market research studies and public opinion surveys for both business-to-consumer and business-to-business companies. The firm has more than 150 full-time employees.

Taylor Nelson Sofres has completed the acquisition of the broadcast division of U.K.-based **BMC News**, following receipt of approval from Britain's Office of Fair Trading. The activities of BMC's broadcast division will be combined with the group's existing media intelligence activities in the U.K. These activities form part of TNS Media Intelligence.

Germany-based **GfK Group** has acquired 51 percent of the shares in Germany-based **Macon AG**. Established in 1991, Macon AG produces geographical information systems. GfK has supplied Macon with basic demographic and sales data, which it uses in the digital maps and Regiograph and District software it offers. The new company, which will trade under the name GfK Macon, achieved sales of around EUR 3 million in 2001, and has 22 employees. In addition, GfK Group's Spanish subsidiary **EMER GfK** increased its 27.6 percent participation in the Portuguese research firm **Intercampus** to a majority shareholding of 50.01 percent. Intercampus, established in 1990, achieved sales of around EUR 2.5 million in 2001.

Alliances/strategic partnerships

MRSI (Marketing Research Services Inc.), Cincinnati, has announced partnerships with **Greenfield Online Inc.** and **Global Market Insite, Inc.** (GMI). Under the terms of the agreement, Greenfield Online will provide MRSI with qualified survey respondents from its panel of 1.2 million members and through its MSN "river" sampling capabilities. MRSI has entered into an enterprise licensing agreement with GMI to use its Net-MR software suite for Web-based data collection and reporting.

Rochester, N.Y., research firm **Harris Interactive** has signed an agreement with **Tradelink Reputation Management S.A.**, Athens, Greece, making it the newest Harris Interactive Global Network member company. Tradelink will represent Harris Interactive in Greece, as well as in Bulgaria and in Cyprus.

Association/organization news

At press time in May, **The European Society for Opinion and Marketing Research** (ESOMAR) had resumed its search for a new director general after previously named

Director General Chris van Schijndel resigned due to "hitherto unforeseen private circumstances." The ESOMAR Council has asked former Director General Mario van Hamersveld to continue in his role as acting director general until a replacement is found.

Separately, ESOMAR donated EUR 100,000 to Princess Margriet of the Netherlands for the Red Cross and Red Crescent Societies. Princess Margriet is chair of the Worldwide Standing Commission of the International Federation of the Red Cross and Red Crescent Societies. The EUR 100,000 will be spent on international programs in a variety of countries. After the events of September 11th, the ESOMAR council gave consideration to the cancellation policy to be applied to those who were unable to attend the ESOMAR annual congress in Rome in September 2001. The council unanimously decided that rather than reimburse registration fees to those who cancelled, ESOMAR should donate an amount equivalent to the value of these cancellation fees to charity. The council also agreed that ESOMAR should add an equivalent sum to the donation.

New accounts/projects

Sunnyvale, Calif., research firm **NetRaker Corporation** has entered into an agreement with **Yahoo! Inc.** to provide the NetRaker Suite of Web site evaluation tools to all Yahoo! business groups worldwide.

Schaumburg, Ill.-based **ACNielsen U.S.**, has become the preferred provider of syndicated market research information to **Fleming's Retail Group**. Fleming's Retail Group operates 101 Rainbow and Food4Less "price impact" grocery stores in seven states. The Retail Group will utilize ACNielsen for sales tracking and analysis, space management, and for the creation of custom trade area reports to be used in conjunction with Fleming's manufacturer partners.

Kadence, a London research firm, has decided to use Dub Interviewer software from Netherlands-based **Nebu** for its global data collection requirements.

Information Resources, Inc., Chicago, has entered into an agreement with **Wyeth Consumer Healthcare**, Madison, N.J., under which IRI will provide the InfoScan Reviews databases and a range of analytic services.

New companies/new locations

Jorge García-González has opened **JGG Consulting**, a Buenos Aires firm offering strategic marketing consulting and business performance improvement services. The firm is located at Av. Pueyrredon 2449, Piso 11, C1119 Buenos Aires, Argentina. Phone and fax 54-11-4807-1850. E-mail info@jggconsulting.com.

Population Research Systems (PRS), a San Francisco research firm, has relocated. With the firm's parent company, **Freeman, Sullivan & Co.**, PRS has moved 100 Spear St., Suite 1700, San Francisco, Calif., 94105. Phone 415-777-0707. Fax 415-777-2420.

J.D. Power and Associates has moved its California corporate headquarters from Agoura Hills to a new and larger facility in Westlake Village. The move consolidates the firm's corporate office with its Newbury Park, Calif., facility. The new address and contact information for the corporate headquarters: 2625 Townsgate Road, Westlake Village, Calif., 91361. Phone 805-418-8000. Fax 805-418-8900.

TRBI (The Research Business International), a U.K.-based qualitative research firm, has opened two new offices in the United States. TRBI is a part of Maritz Research Inc. The two new offices will be located in New York City and Chicago, and will offer exploratory approaches such as observation and ethnography, along with other qualitative methodologies.

Robert Shulman has launched a new research firm, **Markitecture**, at 5 New Street, Norwalk, Conn. Phone 203-855-9050.

Company earnings reports

For the first quarter ended March 31, **Arbitron Inc.**, N.Y., reported revenue of $65.9 million, an increase of 9.5 percent over revenue of $60.2 million during the first quarter of 2001. Earnings before interest and taxes (EBIT) for the quarter were $27.6 million, compared with EBIT of $27.3 million during the same period last year. Net income for the quarter was $14.2 million, compared with $16.3 million for the first quarter of 2001.

Cost and expenses were higher than last year because of planned increased spending related to the RADAR service, the Portable People Meter initiative, royalties, data collection, and research and development. Net income compared to 2001 declined as a result of interest expense related to the debt incurred in connection with the reverse spin-off from Ceridian on March 30, 2001.

Net income per share for the quarter was $0.49 (basic) and $0.48 (diluted), compared with $0.56 (basic and diluted) per share during the comparable period last year. The 2001 earnings per share amounts have been adjusted to reflect the one-for-five reverse split, which became effective following Arbitron's reverse spin-off from Ceridian on March 30, 2001. Effective January 1, 2002, the company discontinued the amortization of goodwill in accordance with generally accepted accounting principles. Had the company been required to adopt this accounting effective as of January 1, 2001, net income and diluted net income per share for the three months ended March 31, 2001 would have been $16.7 million and $0.57, respectively.

Catalina Marketing Corporation, St. Petersburg, Fla., reported results for its fourth quarter and fiscal year ended March 31. Revenue for the quarter grew 18 percent to $133.5 million compared to $113.4 million in the prior year fourth quarter. Net income for the quarter totaled $22.7 million, or $0.40 per diluted share, compared to $14.5 million, or $0.25 per diluted share, for the prior year period.

Revenue in the company's research operations decreased approximately 9 percent compared to the prior year fourth quarter. For the fiscal year ended March 31, revenue increased approximately 7 percent over fiscal year 2001. The company's research operations are conducted by **Alliance Research**. Earnings for the research operations were equal to approximately $0.01 per company common diluted share this quarter. For the fiscal year, the research operations contributed approximately $0.04 per company common diluted share.

As described below, the company implemented Statement of Financial Accounting Standard No. 142 (SFAS 142) as of the beginning of the current fiscal year, relating to the accounting for goodwill. As a result of adopting the new standard, the company's net income and diluted earnings per share were increased during the fourth quarter by approximately $1.6 million and $0.03, respectively. Under the new standard, pro forma net income for the fourth quarter of the prior year would have been $15.5 million, or $0.27 per diluted share.

For the 12 months ended March 31, revenue totaled $446.7 million, up 7 percent compared to $417.9 million for the prior year. Net income for the current fiscal year totaled $61.9 million, compared to $58.1 million for the annual period last year. For fiscal year 2002, earnings per diluted share were $1.08, compared to earnings per diluted share of $1.00 in fiscal year 2001. Under SFAS 142, pro forma net income for the prior year twelve-month period would have been $61.7 million, or $1.06 per diluted share.

For the fiscal 2002 third quarter ended March 31, **Harris Interactive**, Rochester, N.Y., reported revenue of $28.3 million, up 14 percent from the $24.8 million reported in the fiscal 2002 second quarter, and up 79 percent from the $15.8 million reported in the same period a year ago. The results include the first full quarter of revenue from Total Research Corporation, which was acquired by Harris Interactive in November 2001.

The company was cash flow-positive for the quarter for the first time and achieved $0.3 million in EBITDA. For the third fiscal quarter, the company reported a net loss of $1.2 million or ($0.02) per share, improved from a net loss of ($0.17) per share a year ago. The firm reported $28.5 million in cash and marketable securities as of March 31.

Fairfield, Conn.-based **IMS Health** reported diluted earnings per share from recurring operations of $0.20 for the quarter ended March 31, up 5 percent from last year's first quarter. Net income from recurring operations grew 5 percent year over year to $58.8 million. Recurring results exclude certain pretax gains and charges totaling $0.7 million.

During the first quarter of 2002, revenue totaled $331.4 million, up 5 percent constant dollar and 1 percent on a reported basis compared with last year's first quarter. Operating income was $91.3 million, up 2 percent constant dollar and down 5 percent on a reported basis from the year-earlier quarter. Net income rose 5 percent to $58.8 million, or $0.20 per share, in the 2002 first quarter.

NetRatings, Inc., Milpitas, Calif., announced financial results for its first quarter ended March 31. Revenues were $4.3 million, compared with $6.7 million reported in the same period one year ago. Pro forma net loss for the first quarter of 2002 was $2.3 million or a loss of ($0.07) per share on approximately 32.9 million weighted shares outstanding. (The pro forma results exclude amortization of non-cash stock-based compensation and one-time charges related to the previously announced restructuring plan and the termination of the Jupiter MediaMetrix and AC Nielsen eRatings.com acquisitions.) This compares with pro forma net loss in the same period one year ago of $700,000 or a loss of ($0.02) per share on approximately 32.6 million shares outstanding.

On a GAAP basis, which includes the amortization of non-cash stock-based compensation, and one-time charges related to the first quarter restructuring and termination of the Jupiter MediaMetrix and AC Nielsen eRatings.com acquisitions, net loss for the first quarter of 2002 was $17.7 million, or a loss of ($0.54) per share. This compares with a net loss of $3.4 million, or a loss of ($0.10) per share during the same period one year ago.

Pro forma operating expenses decreased to $5.4 million in the first quarter of 2002 from $5.8 million in the fourth quarter of 2001. During the first quarter the company completed a 15 percent workforce reduction and discontinued two unprofitable product lines. The company expects these actions to result in annualized operating expense savings of $6 million to $8 million.

First quarter gross margins were 38 percent, in line with the company's guidance and equal to the margins posted in the fourth quarter. Cash at the end of the first quarter was approximately $297 million following the repurchase of 1.5 million shares during the quarter and the company continued to have no long-term debt.

For the first quarter of 2002, **Opinion Research Corporation**, Princeton, N.J., reported revenues of $42.5 million compared to first quarter 2001 revenues of $45.8 million. For the first quarter, EBITDA was $3.6 million compared to $5.4 million in the first quarter of 2001. Income for the first quarter was $789,000 and diluted earnings per share were $0.13. Both income and diluted earnings per share exclude the cumulative effect of a change in accounting principle resulting from the adoption of FASB Statement 142.

For the first quarter of 2001, net income was $1.1 million and diluted earnings per share were $0.18. For comparison purposes, net income for the first quarter of last year would have been $1.7 million or $0.29 per diluted share if goodwill amortization had been excluded consistent with FASB Statement 142.

After the cumulative effect of a change in accounting principle resulting from the adoption of FASB Statement 142, first quarter 2002 net income was $497,000, or $0.08 per share. This reflects a non-cash goodwill impairment loss from the write-off of $292,000 of goodwill associated with a non-U.S. subsidiary.

SPSS Inc., Chicago announced results for the first quarter 2002. On a pro forma basis, excluding acquisition-related and other non-recurring charges, and including the impact of the adoption of SFAS No. 142 (Goodwill and Other Intangible Assets), diluted earnings per share and revenues for the quarter ended March 31 were $0.00 and $49.4 million, respectively. These results compare to analyst expectations of earnings of between $0.03 and $0.08 and revenues of between $47.0 and $50.0 million. For the same period last year, pro forma earnings per share and revenue were $0.05 and $44.1 million, respectively, and GAAP loss and revenues were ($0.77) and $36.5 million, respectively.

Revenues for the firm's market research business were up 30 percent from pro forma market research revenues in the first quarter 2001 due to $1.7 million of AOL-related revenues; they were otherwise up 4 percent, reflecting the continued difficult climate for completing high-ticket sales to information technology departments in market research firms. The Online (AOL) business continued to draw most of its revenue in the quarter from the customer base inherited from AOL/DMS, but the pipeline of new prospects grew from December 2001 despite price pressure from new competitors.

For the quarter ended March 31, 2002, Chicago-based **Information Resources, Inc.** (IRI) reported net income, before restructuring and other items, of $1.0 million or $0.03 per share compared to previous guidance for the quarter of $0.01 per share and to breakeven net income for the first quarter of 2001. Including the impact of restructuring and other items, IRI reported a net loss of $2.3 million or ($0.08) per share compared to a net loss of $2.5 million, or ($0.09) per share for last year's first quarter.

Revenues of $133.1 million were 2 percent lower than the first quarter of 2001. U.S. revenues were $100.0 million, a decrease of 3 percent versus prior year. While revenue from IRI's Retail Tracking business was down for the quarter, its Panel and Analytics business posted 5 percent growth over the same period last year. International revenues of $33.1 million were essentially unchanged from last year in U.S. dollars, but 4 percent higher in local currencies. Operating income before restructuring and other items was $2.2 million compared to $1.5 million in the first quarter of 2001. U.S. and corporate expense savings offset the decline in U.S. revenues resulting in a slight improvement in overall operating results.

Survey Monitor

continued from p. 8

eases or treatments or about staying healthy. The results also demonstrate the critical importance for health care Web sites to be quickly and easily accessible through search engines and portals.

Data from other Harris Interactive research show that, increasingly, cyberchondriacs are using the sites of established organizations — academic, governmental, pharmaceutical, etc. — rather than using "pure e-health" sites. For access to the data tables and charts for this survey visit www.harrisinteractive.com/harris_poll/index.asp?PID=299.

Some African-Americans misinformed about hypertension

Many low- to middle-income African-Americans may be misinformed as to the causes, symptoms, and treatment of high blood pressure, recent study findings show. Proportionally, three times as many blacks die due to hypertension as whites and the condition is a "major reason why life expectancy is years less for African-Americans," according to a report in the January issue of the *American Journal of Medicine*. Dr. Ruth P. Wilson of San Jose State University in California and her colleagues conducted street surveys of 60 people aged 18 to 67 and interviewed another 107 people divided into 12 focus groups. Ten of the 60 individuals interviewed on the street had a history of high blood pressure.

Slightly more than one third of respondents (35 percent) believed that high blood pressure resulted when individuals ate pork "or other foods causing blood to travel too fast to the head," hence the term "high blood," according to a report. Only 15 percent of the survey participants correctly associated high blood pressure with elevated pressure in blood vessels.

Ten of the 12 focus groups correctly identified heredity as a factor related to high blood pressure, and eight groups identified salt, excess alcohol and excess weight, or lack of exercise as contributing factors. On the other hand, eight groups considered pork or other "wrong foods" to be a major cause of high blood pressure and five groups cited evil spirits or sin. All 12 groups thought psychological stress was a major cause of high blood pressure.

"Emotional stress is not thought to be a major cause of chronic hypertension, and there is little evidence that stress reduction techniques (relaxation, mediation, biofeedback) are effective treatments for hypertension," the authors wrote.

Individuals from all 12 groups thought headaches, dizziness, weakness or fatigue, and ears that hurt or pop were symptoms of high blood pressure; only four groups knew that high blood pressure often has no symptoms.

Eleven of the 12 groups incorrectly believed that high blood pressure could be treated with garlic, or herbs or vitamins, the report indicates. Nine groups cited vinegar as a treatment; six groups cited Epsom salts or salt and two groups believed that prayer was an effective treatment for the condition.

What's more, although high blood pressure is known to be a leading cause of death among African-Americans, none of the 18- to 29-year-old focus group participants identified it as such. Two of the four groups of 30- to 49-year-old participants and three of the four groups of 50- to 74-year-old participants identified high blood pressure as a leading cause of death. In contrast, every group identified AIDS and crime as leading causes of death among African-Americans, and most groups also cited cancer as a leading cause of death.

"Public health efforts need to target young adults, in part, because the African-American disadvantage in death and disability caused by hypertension is greatest among persons younger than 45 years old," the researchers wrote.

'Malternatives' fastest-growing alcoholic beverage group

As demonstrated by the success of "malternatives" — innovative, flavored malt-based beverages — new products are one key to reaching twentysomething consumers of legal drinking age in the highly competitive beer, wine and spirits industry, according to a new survey released by Chicago-based Information Resources Inc. entitled "IRI Insights on the Beer, Wine, Spirits Consumer Decision-Making Process."

IRI found that "malternatives" were making inroads into the $125 billion beer, wine, and spirits industry, and have been particularly successful in penetrating the young adult (aged 21-29) segment, which is entering a significant growth period as Echo Boomers mature.

"Beer, wine, and spirits manufacturers have a major opportunity to establish a relationship with the most sought-after consumers. IRI's research shows that young adults are more interested than other groups in trying new alcoholic beverage products," says Ed Kuehnle, president of IRI North America. "But to reach these consumers, it is critical to take their unique purchase patterns into account. For example, versus the over 30 crowd, they are more likely to purchase alcoholic beverages for immediate consumption and are significantly more likely to be driven by mood."

According to IRI data for supermarkets and drugstores, volume sales of new "malternative" beverages like Smirnoff Ice and Mike's Hard Lemonade grew 81 percent during the 24 weeks ending January 13, 2002 versus the same period last year. This sharp increase compares to 1 percent growth for the alcoholic beverage category as a whole.

Key findings from the IRI study:

• Consumers are far more open to different types of alcoholic beverages when in a restaurant (49 percent) or bar (37 percent) than in a store (14 percent).

• Three quarters of consumers do not make a brand choice before they enter a restaurant.

• Young adults (aged 21-29) are more likely than those over 30 to purchase for immediate consumption (40 percent versus 21 percent).

• Young adult purchase decisions are more likely to be driven by mood than those over 30 (57 percent versus 44 percent).

• Young adults are more open to trying new products (56 percent versus 40 percent).

"New types of alcoholic beverages should be aggressively promoted on-premise in bars and restaurants. In off-premise locations, including liquor and convenience stores, new products targeted to the young adult market should have single-serve distribution and adequate shelf space to avoid out-of-stocks on six- and 12-packs," Kuehnle says. For more information visit www.infores.com.

Americans turning up the heat on frozen food

Port Washington, N.Y.-based NPDFoodworld's National Eating Trends "Turning up the Heat on Frozen Meal Options" report shows that although restaurant take-out meals per capita fell in 2001 for the first time since the early 1980s, the frozen meal category has continued its steady growth over the past 10 years. The average American ate a frozen meal option about six times each month or 74 times during the period of March 2000 through February 2001, a 33 percent increase since 1992.

The report shows that this category has established a sizeable presence not just at dinner, but at breakfast, lunch, and snack time as well. "With supermarket sales of frozen meal options increasing, it is important that manufacturers understand what is driving growth in order to develop successful market strategies," says Arnie Schwartz, vice president, NPDFoodworld. "With 80 percent of meals eaten at home, but Americans spending less time in the kitchen, frozen food manufacturers appear to have hit their stride and are giving restaurant take-out some competition." For more information contact Joe Derochowski at 847-692-1736 or visit www.npd.com.

Total Frozen Meals

Year	Annual Eatings Per Capita
2001	74.0
2000	73.3
1999	72.1
1998	69.5
1997	68.4
1996	66.8
1995	63.1
1994	59.6
1993	60.2
1992	55.7

Source: NPDFoodworld National Eating Trends

Study identifies marketing outsourcing trends

Superior, Colo., marketing firm Maccel Group has released results from its online survey, "Marketing Outsourcing Trends." The purpose of the survey was to identify trends and plans for companies seeking to outsource marketing activities. The survey results identify the marketing activities that are most often outsourced and how outsourced firms are typically selected.

The results indicate that 45 percent of companies surveyed believe that selecting a marketing services firm with a "proven methodology or process" is extremely important. This requirement is even more important to large companies (2,000 employees and greater), with more than 67 percent requiring a proven methodology. In addition to selecting firms with a proven methodology, companies choose firms based on their expertise in the customer's industry.

The marketing activities outsourced by at least 40 percent of survey respondents include marketing collateral development, Web site development, advertising creative, and direct mail campaigns. Large companies are more likely than smaller companies to outsource additional activities such as telemarketing, product launches, brand development, and product or service message development.

Additional findings indicate that one third of the companies saw their marketing budget decrease in 2002, with nearly a quarter of respondents indicating their budgets were cut by more than 10 percent over the last year. Companies are focusing their marketing efforts on lead generation programs and are allocating the largest amount — one-third plan to spend more than 20 percent — of their budgets to such programs. For more information visit www.maccelgroup.com.

Michigan

continued from p. 22

or having the interviewer help you use one?" Several initial test interviews were conducted and it became evident that many of the recruited participants did not have enough experience using the Internet to provide useful feedback on the Web site. The participant needed to have at least a rudimentary understanding of how to use a Web site in order to appropriately answer questions during the interview.

Clearly, a respondent's comfort level with the Internet varies, and the population we were working with had varying degrees of competency. Some participants remarked that the question we posed was regarding computer use, not Internet use in specific. Still others felt that their ability to "point and click" was enough, even if they had never used the Internet. We revised the question to force participants to qualify themselves based upon their response. It read: "How comfortable are you using the Internet to access information about a variety of topics?" Only those individuals who stated that they were very comfortable (or a similar response) were taken through the rest of the screener. Still, several recruited participants had less expertise in using the Internet than expected. The key to evaluating their experience with the Web site as a potential user was an unconventional mingling of qualitative and quantitative methods.

Integrating measurements

While in-depth interviews tend to be a purely qualitative process, integrating quantitative measurements can also accomplished relatively easily. For this project, the budget did not allow for eye-tracking, so a series of self-administered tools were developed. Participants completed a questionnaire about colorectal cancer via paper/pencil. Before the interview began the interviewer asked a series of questions about the participant's experience using the Internet, whether they searched for health information online, etc. Each participant also filled out an online questionnaire and the responses were later used to customize aspects of the Web site. Once the interview was complete, another online questionnaire was administered. To determine the efficacy of the Web site's information delivery, several questions were repeated before and after viewing the Web site. Finally, at the end of the interview a paper/pencil document gave participants an opportunity to further voice their opinion on the Web site.

The Web site testing was conducted with two laptops, one being the server and the other the client. By using this configuration we were able to immediately export the data from the online questions into a spreadsheet for analysis. Responses from the other questionnaires were also added later for comparison. By integrating these quantitative components into the project we were more accurately able to determine if the Web site was achieving our goals.

During the interview, qualitative measurements were also made including tracking how participants reacted to particular aspects of the Web site and the navigation choices they made. Developing an interviewer guide was a crucial aspect of the project, and our format allowed us to address two major areas of the Web site: usability and content. A series of 48 questions was created and each addressed usability or content of a particular section of the site. Subfactors to usability and content were also assigned to each question to assure that all aspects of the site were appraised. These included:

Usability	Content
• navigation	• comprehension
• timing/timeliness	• utility
• clarity of graphics/text	• appealing
• user focus	
• inclusive/comprehensive	

The interviewing method itself was also a blending of qualitative and quantitative methods. Participants were encouraged to speak aloud as they negotiated the Web site and verbalize why they made particular choices and how they felt about each page. We decided that there were three potential types of interviews: structured, unstructured, or semi-structured. Based upon the relative abilities or comfort level of each user (determined once they reviewed a page or two of the Web site) the interview type was chosen.

Structured interviews were rigid in nature; the interviewer went through the Web site page by page with the participant, asking questions from the guide. This worked best with users who were less comfortable with the Internet.

Unstructured interviews were conducted with participants who were experienced Internet users. They were instructed to use the Web site until they had visited all areas to their personal satisfaction. If a major area of the site was missed, they were asked to review it at that point. Throughout the interview, questions were asked directly from the interview guide, but not necessarily every question was addressed.

The semi-structured interview was used most often and also brought fruitful results. During these sessions, participants went through the Web site at their own pace as the interviewer asked questions from the guide. As similar themes arose, a blending of the semi- and unstructured interviews allowed the interviewer to delve deeper into a particular topic, or break new ground.

Adding, deleting, or modifying the interviewer guide is just as important with usability testing as it is in a focus group setting. Throughout the session participants were asked why they chose to click on a particular word, if they liked color choices, what they expected to have happen after they clicked, and whether the text was easy to understand. A degree of flexibility, with an additional structured mechanism in place, can provide a great deal of insight into the usability of a Web site. The interviewer guide also served as the primary tool for field notes. We inserted large blank spaces in the guide immediately after each question, thus leaving space for participant responses and the interviewer's observations.

Although we videotaped and audiotaped the interviews, observation of participants' action, interactive questioning, and lengthy field notes were more fruitful sources of information.

Usability evaluation

Three dramatically different versions of the Web site were created: the prototype used for the first six preliminary tests; a revised version after 10 interviews; and another site once the project was complete and data collected. An examination of the first two versions with regard to navigation, usability, and content illustrates how usability testing can provide insight specific to health care-related Web sites.

During preliminary testing the navigation of the Web site proved to be universally difficult for participants. When searching for information about health care, participants were searching for a concise method for moving through the Web site and finding information. The first version of the site used a series of tabs to convey each section and sub-section of the Web site. Within each tab there were sub-sections, but users did not see the sub-sections as they focused only on the larger tabs. To correct this in the revision, the sub-sections were color-coded to the larger tab, making a subtle but identifiable connection.

In this case, traveling through the Web site in a particular order was also important. When discussing colorectal cancer, users needed a certain degree of background information in order to decide which test for the disease they would be most comfortable choosing. Our assumption was that users would travel through the site in a linear fashion through each tab, thus gathering important information before reaching the "Choosing a Test" tab. During usability testing we found that while some participants followed the tabs successively, other skipped around. In order to combat this we added numbers to each large tab encouraging the user to go through each section step by step. (See Figures 1a and 1b.)

As with any site, usability of a health care Web site is vital, and means the difference between a user clicking through the site or bypassing it out of frustration. The central focus of our Web site was a discussion of the four types of tests for colorectal cancer. For the first version of the site we wanted to give background information about the processes for choosing each test, and discuss some misconceptions about colorectal cancer testing (Figure 2a). Users told us that our page was confusing, had too much information, and their next step was unclear. For the revision (Figure 2b) we took out all introductory material and made the names of the four tests more prominent.

Figure 1a

Figure 1b

After testing showed that some respondents were skipping around the tabs on one page (Figure 1a), numbers were added to each tab (Figure 1b) to encourage users to move through each section step by step.

Reducing the required number of click-throughs allowed our participants to find the information they needed faster. Users — especially in this age group — are looking for solutions to their health care concerns. They appreciated factual data and were eager to get to portions of the Web site that focused on how to bring to bear what they were learning with regards to their personal health needs.

Content evaluation

Once the navigation and usability of a Web site are in order, the content should be considered. For a health care Web site, adding a glossary and pronunciation guide is a good way to give the user definitions of difficult words. We made our glossary a prominent feature of the site, and potentially problematic terms were added to it. Using abbreviations for long terms may be a space saver, but it proved to be a barrier for many users. Our Web site users also appreciated the use of photos and diagrams to illustrate the text of the Web site. In general, the Web site needed to contain clear language without the use of complex technical terms. Finally, it is important not to underestimate the amount of information needed by the user. We found that once participants became familiar with preliminary information about the disease they were eager to learn more. Adding statistics, links to other health Web sites, and reference materials worked to enhance the user's experience.

Overall, the 30 interviews we conducted yielded a mixed bag of responses. More experienced users were quick to point out both content and usability features the Web site was lacking. They were also more likely to make suggestions for altering the site to meet their needs. Less experienced Internet users needed more prompting and the interviewer needed to ask probing questions about how they used the site and the navigation choices they made. Those who had participated in the earlier focus groups were more likely to comment on aspects of the site that were suggested during the focus groups. They were quick to point out whether or not the Web site was as they had envisioned it. Many of the non-focus group participants had no or very limited exposure to colorectal cancer. Their comments concentrated on content more often than not, and usability issues were tied to accessing further information.

There were also some differences between men and women's responses to interviewer questions. Women requested more visual information from the Web site. Unprompted responses included requests for additional photos and diagrams of cancer cells, screening instruments, and polyps. On the other hand, when men were asked about inclusion of these same visuals they responded either negatively, or that they would like an "opt-in" option to see these visuals. Men also requested statistical information more often than women.

Figure 2a

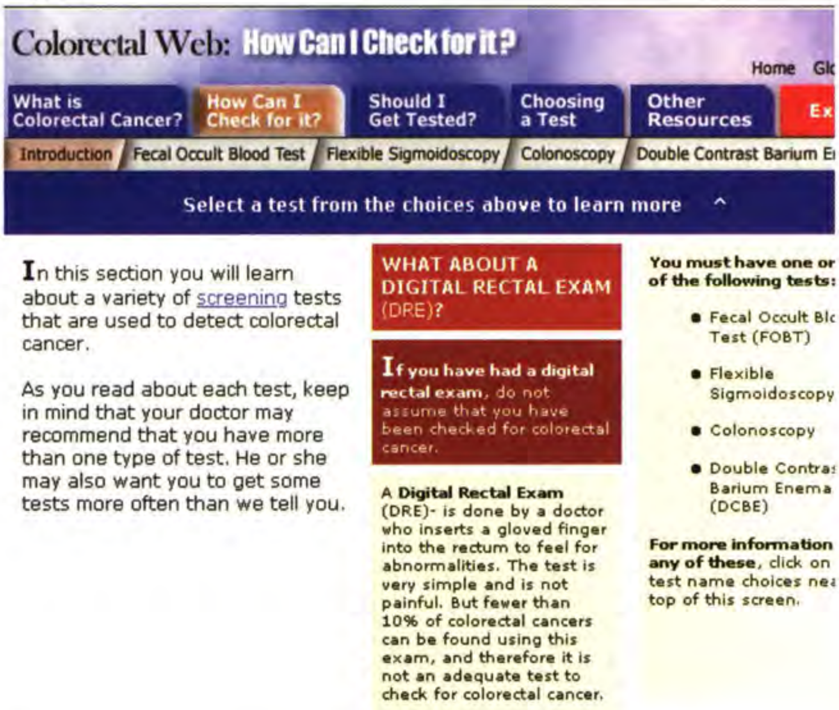
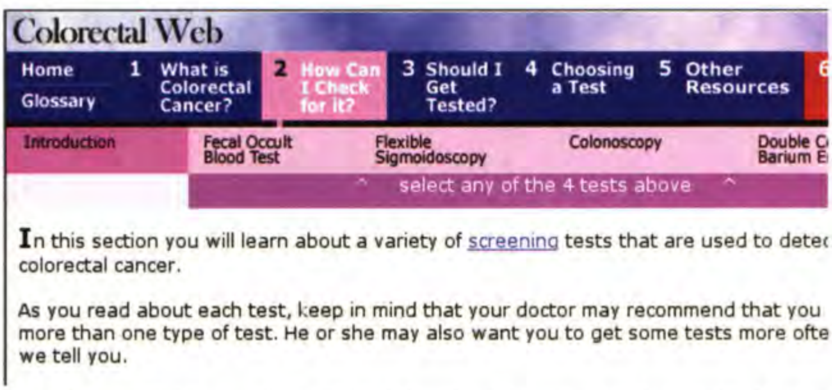


Figure 2b



Respondents said that the page detailing the tests for colorectal cancer was confusing and had too much information on it (Figure 2a). For the revision (Figure 2b), introductory material was removed and the names of the four tests were made more prominent.

Refine and benchmark

Web site usability testing can be a valuable tool when conducting health care research. The ability to gather input from a potential user allows you to refine a Web site until it meets your specific goals. Consider integrating qualitative and quantitative methods in order to benchmark the revisions you make to the site throughout the project. Also, creating multiple versions of the Web site allows for different approaches during the interviewing phase. Encouraging the participant to provide input at their comfort level during the actual interview will also yield better results. Finally, be sure to analyze both the usability and content of the Web site. Both of these components should work together to formulate a successful site.

Moen

continued from p. 25

surprisingly normal cross-section of the population who were willing to let researchers observe them showering. Granted, some did claim to be "social nudists," but most were just run-of-the-mill folks who were comfortable with the idea of being watched while they shower and also interested in the being part of the research process.

"People always assume that this was impossible to recruit," Mariampolski says. "The only thing that was tough is that we were trying to get a wide range of average everyday people — men and women, different body shapes, ages, etc. — and we also wanted to get a variety of showering environments — the upscale suburbanite, as well as the inner city apartment dweller."

Privacy issues

While this ethnographic project presented obvious privacy issues, Mariampolski says the researchers' job was the same as in any observational project: gain trust, build rapport, and make it clear they aren't there to judge the respondents or evaluate their behavior or their home. "We put a lot of emphasis on partnering with the respondents. We give them the chance to opt in to what we are trying to achieve and what their role is and what we are trying to do for the client. It's all a matter of the quality of the rapport. If people are willing to take part in something like this in the first place, they are going to go into it wholeheartedly. The first barrier is just getting them to agree, but once they agree and you treat them with dignity and with respect, and you are not judgmental, they relax and open up.

"What you are trying to catch is that moment where consumers become aware of something that they usually take for granted, something they haven't thought about before. They say, 'Gee, I've never done anything about this. Gee, there should be something done about this…' That is when it gets really exciting and you know you are discovering an opportunity."

More than just getting clean

The research showed that though everyone approaches a shower with the goal of getting clean, people have many additional aims. Probably the most common one is to shake off the cobwebs from a night of sleep and get ready for the day ahead. Those with achy backs and muscles use showers as therapy sessions, relying on the warm air and the pulse of the water to loosen creaky joints. Many see showers as a transition from one psychological state to another — for example, from a long day at work to a relaxing evening at home or a fun night out. Once you shower away the worries of the day, the night is all yours.

Others just want to stand under the water and decompress. "People want the showering experience to be relaxing. When you time it out and see what people are really doing, they're only soaping themselves down and rinsing through about half to two-thirds of the process. The rest of the time they are doing things for psychological reasons, to get relaxed, to calm down," Mariampolski says.

During the research, however, the showering gods appeared to be conspiring against the relaxation-seekers. "You watch the way people shower — they are struggling, moving their bodies all over the place to get under the water — and it's just so inconsistent with the idea of being relaxed. You see people literally dancing all over the place to get parts of their body washed and struggling to get clean. If you have to do this dance you can't be relaxing," Mariampolski says.

That dancing probably wouldn't be necessary if showers offered consistent water flow and good coverage. Respondents talked about improving the water flow, expressing the belief that a higher flow is better, while at the same time acknowledging that they didn't want to waste water, Mariampolski says. "That presented a paradox because on one hand, people were unhappy with their water flow — the shower is too weak/too strong — but at the same time, they had concerns about water conservation. They said, 'I want to do more with what I've got.'"

The respondents also tended to have a hard time seeing in the shower. Showers are often dim places, and people squint or close their eyes to avoid soap suds. "We were surprised at just how blind people are in the shower. That got us wondering how we could do a better job of working with that fact, making the product more intuitive, easier to use. Also there were some things we learned about people putting themselves at risk in the shower — balancing themselves on things that aren't made for that purpose, holding onto the hot water handle, etc. People don't think about how slippery the surfaces are," Suvak says.

These findings pointed toward dropping the water flow control mechanism out of the stream of water, and giving it a knob that's easy to locate and easy to adjust.

Watched them shop

Prior to developing Revolution, Moen also watched consumers shop for showerheads in home improvement stores, talking with them about the purchase process and in some cases following up weeks later to see how satisfied respondents were with their purchases. "We were trying to get an understanding of how they shop for the product," Suvak says. "We found that shoppers were concerned with water flow and strength of spray. Also, a new showerhead isn't a heavily considered purchase for a lot of people. Unlike a kitchen or bathroom faucet, where people spend more time thinking about it — it has to have a style impact — the shower is considered a more functional area. That doesn't mean that there are no style considerations but it obviously has to deliver a certain experience and it's difficult to know at the point of sale what a showerhead can do. There has to be some leap of faith that people make with it," Suvak says.

The in-aisle research showed that 90 percent of consumers want a chrome or white finish on their new showerhead; 41 percent are replacing a worn or broken unit; 32 percent are replacing to add new functions; 64 percent are looking for a showerhead that provides greater water flow; 59 percent want greater force of spray; and 69 percent end up buying a showerhead that has a massage setting.

Bathroom makeovers

The introduction of Revolution dovetails with the trend of turning bathrooms into retreats where people can de-stress and re-energize, using aromatherapy, music, candles, etc., to engage the senses and indulge the soul. But while bathroom makeovers are popular features in home and decorating magazines, Moen realized that most people don't have the spacious, dream bathrooms with loads of ambient light found in the magazines. More often, it's a 3x3 shower stall or a tub with a shower curtain. "People aspire for more and our goal with Revolution is to give them more within the constraints they have today," Suvak says.

"The bathroom is turning into an entertainment center," Mariampolski says. "People are looking for small luxuries that have a big impact on their quality of life. This is one of them."

Strong work

Not to be overlooked is the strong work of Moen's engineering department, which took the research recommendations and created a product that met a variety of needs. To do so, they had to overcome some challenges, Mariampolski says. "The first was: make something that really relaxes people, that enhances a sense of well-being, and something that offers wider coverage. And engineer something that makes it feel like more water is coming out."

Their efforts appear to have been quite successful. Moen won't release sales figures but anecdotal evidence and industry buzz point to a winner. "Moen made a decision early on to run with the research," Mariampolski says. "They weren't just trying to do the research to confirm a preconceived idea; they really wanted to find a way to make a difference. This was a category that was primed for this sort of thing. Part of the reason that the product has been so successful and the marketing positioning so effective is that there was a real opportunity for innovation. Moen's intention was to bring something new to the category and that's just what they did."

QuickLink

To read up on ethnographic research, visit www.quirks.com and enter Article QuickLink number 172 ("Researchers can learn from ethnography") or 281 ("Seven rules for observational research: how to watch people do stuff").

Product & Service Update

continued from p. 12

Microsoft Access database. Perseus, MobileForms is used to collect, analyze, and report data for a wide-range of applications including market research, customer service, field sales reporting, inventory management, site inspections, and field audits. Perseus MobileForms is licensed per handheld device. Support for form design for the Palm device is included with SurveySolutions Professional and Enterprise products version 4.1 and above. Wireless support requires Perseus SurveySolutions Enterprise. For more information visit www.perseus.com.

Sage debuts online tech roundtables

Sage Research, Inc., Natick, Mass., has launched the Sage Technology Roundtables, a monthly series of online focus groups with qualified high-tech enterprise decision-makers. Each Roundtable examines issues surrounding a specific technology or service by talking with the managers and executives who buy and use the technologies. Participants are selected from the Sage Panel, which includes professionals who evaluate, use, and purchase information technology-related products. Sage Research staff moderate the sessions, and participants are pre-screened for relevant technology knowledge and decision-making authority.

On July 8th from 6:00-7:00 p.m. EDT a Roundtable session will focus on virtual private networks (VPNs) and address the following questions: What are the current perceptions regarding the adequacy of IP VPN security, and what can vendors do to address security concerns? Are network managers willing to pay a premium for VPNs with VoIP capabilities? Do IP VPN early adopters prefer network-based or CPE-based VPNs, and why? For more information contact Doug Haslam at dhaslam@sageresearch.com or 508-655-5400, ext. 292, or visit www.sageresearch.com.

NOP World Health adds diabetes patient study

East Hanover, N.J.-based NOP World Health is now offering the Diabetes Patient Market Study, which has been produced by its sister company, RoperASW, since 1989. The 2002 U.S. Diabetes Patient Market Study is based on a nationally representative sample of 2,000 diagnosed patients. Results can be compared with findings from Diabetes Patient Market Studies in other major regions around the world, including Europe, Canada, Latin America, and Asia. The study includes information on: the size and growth of the overall market, as well as of treatment segments, such as insulin, oral anti-diabetic agents (OAAs), diet-only and blood glucose self-monitoring; multi-year trending of market expansion and diabetes care patterns; daily therapeutic and monitoring behavior, including types and volume of insulin used, brands of OAAs and blood glucose monitoring frequency; manufacturer and brand competitive positions; and product/brand switching behavior. Pharmaceutical companies can choose to purchase the entire study package or individual sections. Standalone options include a market overview, insulin medications, insulin injections, or any other combinations of these sections companies select. All options provide the database, including the report and tabulations, in Quanvert format. For more information visit www.nopworld.com.

Track detail visits with Detail Watch

Pharmaceutical companies can now measure their own and competitive physician details — including message recall, perceptions and effectiveness — with Detail Watch from Market Measures/Cozint, East Hanover, N.J. Conducted over the Internet, Detail Watch captures call information, directly from a company's target doctors, within hours of a sales visit. Three levels of analyses let users match their research to their specific needs: Detail Watch-1 is a core analysis that evaluates message recall and perceptions, rep targeting strategies, competitive activity, and detail specifics such as sales aid quality and call length. In addition, it delivers verbatims, a message report card with comparisons to industry benchmarks, and next steps for increasing sales results. Detail Watch-2 adds effectiveness dimensions, including, message and sales rep quality, promotional impact on physician attitudes and behaviors, performance drivers of message and rep effectiveness, and recommended areas for improvement. It also features multivariate analytics to determine new approaches for improving sales impact. Detail Watch-3 integrates prescribing, rep and call information. By incorporating these additional metrics, Detail Watch-3 provides a view of call effectiveness. Secondary prescribing data reveals what doctors are prescribing — and which promotional elements drove their decisions. Call insights reveal the relationship between number of visits and prescribing volume. Finally, rep feedback provides input from both the salesperson and the doctor. For more information call Rob Sederman at 800-456-4405, ext. 3695 or visit www.marketmeasurescozint.com.

ArcGIS StreetMap Europe now shipping

Redlands, Calif., GIS firm ESRI is now offering ArcGIS StreetMap Europe, an extension to the ArcGIS software providing users with European street map display and geocoding. With ArcGIS StreetMap Europe, ArcGIS users can access street level data for most major western European countries. The new extension includes street level data coverage for Andorra, Austria, Belgium, Denmark, France, Germany, Italy, Liechtenstein, Luxembourg, Monaco, the Netherlands, San Marino, Spain, Sweden, Switzerland, Portugal, and the United Kingdom. The product offers the following capabilities: graphic display of streets and other geographic features; display of the geocoded location of a single address as a graphic point on the StreetMap layer; writing geocoded locations of addresses in a table into a new point feature class; auto-labeling of the StreetMap layer; and ability to export the StreetMap features into other feature classes.

ArcGIS StreetMap Europe uses NAVTECH NAVSTREETS data that is offered in two different data options: general roads or detailed streets. The general roads option is a single data set that covers all of the listed countries. For more information visit www.esri.com/streetmap.

Database covers on-premise alcohol consumption

Trade Dimensions, Wilton, Conn., announces the syndication of its new

On-Premise database, which now delivers universal coverage of on-premise outlets where liquor, wine and/or beer are consumed. This new database incorporates the TDLinx coding structure to provide liquor, wine and beer suppliers with a consistent framework for information about on-premise outlets. Working with suppliers and associations in the alcohol beverage industry, Trade Dimensions established on-premise standardized trade channels and formats.

Trade Dimensions has also enhanced its retail/off-premise database offering by adding fields that indicate the sale of liquor, beer and wine. The addition of these 270,000 on-premise outlets brings the Trade Dimensions database to over 600,000 stores and outlet records. For more information visit www.TDLinx.com.

CustomerSat updates eCEM system

Mountain View, Calif., research firm CustomerSat, Inc., has released an update of its Enterprise Customer Experience Management (eCEM) system. ECEM 4.4 identifies at a glance which feedback is significant at 95 percent, 90 percent, and 80 percent confidence levels. By churning through crosstabulation data and graphically displaying which attribute and demographic sector differences are significant, release 4.4 lets managers identify and focus attention on significant problems and opportunities. Its analytics show managers whether the difference between mean satisfaction scores for two products, regions, or maintenance contract types are significant. Similarly, managers can tell, for example, whether the differences in the percent of eastern region vs. western region respondents who will renew are significant. For more information visit www.customersat.com or call 800-372-7772.

IMS unveils Marketing Effectiveness Suite

IMS Health has launched its new Web-based IMS Marketing Effectiveness Suite of applications designed to help pharmaceutical marketing professionals address questions asked throughout the product lifecycle. The new suite — which provides answers to users' business questions in narrative and graphical formats — integrates marketplace intelligence from IMS prescription, sales, promotional, managed care and medical databases. Applications in the Marketing Effectiveness Suite feature a question-and-answer format that streamlines information exchange among all levels of pharmaceutical business users. Users can benchmark competitive performance, gather market intelligence, track product performance and pinpoint new business opportunities. For more information contact Seth Houston at 610-834-6392 or visit www.imshealth.com.

Briefly...

Walker Information, Indianapolis, has released its patent-pending system, Walker SmartLoyalty, a **customer loyalty management system** combining market research and technology applications to provide real-time, enterprise-wide information. SmartLoyalty collects information to help companies forecast revenue growth from existing customers based on their attitudes and perceptions, and better understand how they can influence those attitudes to generate more loyal customers. For more information visit www.walkerinfo.com or call 800-334-3939.

SPSS has integrated LexiQuest's **text mining software**, LexiQuest Mine, with SPSS's data mining workbench, Clementine. LexiQuest Mine is a linguistics-based text mining application that enables users to identify key concepts, and the relationships between them, when working with thousands of read or unread documents. Clementine discovers the patterns and relationships in numeric data. With the integration of these two technologies, customers can access LexiQuest Mine from the Clementine user interface and incorporate the text data into the regular flow of the data mining process. For more information call 800-543-2185 or visit www.spss.com/spssbi/lexiclem/.

Doane Marketing Research, Inc., St. Louis, will produce a shared-cost market research study entitled **"Difficult to Control Weeds in Glyphosate Tolerant Crops (U.S.)."** To obtain information on the objectives, methodology and costs associated to subscribe, contact Marypat Corbett or Roy Cleveland at 314-878-7707. The prospectus can also be reviewed at www.doanemr.com (click on "New Shared Cost Studies Available").

MarketResearch.com is now offering the free "Alert Me" service to allow subscribers to **keep up to date on new studies available** in their areas of interest. Notifications are delivered every two weeks when relevant reports by any of 350 market research publishers are available.

Ipsos-New Media Research has signed an agreement with Lunarstorm, a Scandinavian youth Web portal hosting more than 950,000 registered members in the 14-35 age segment. The deal grants Ipsos-New Media Research the right to **research the Swedish population**. With more than 25 socio-demographic variables known about the members, researchers can draw targeted samples. Ipsos-New Media Research will offer the panel to end-clients and to other market research companies. For more information contact Andrei Postoaca at andrei.postoaca@ipsos-nmr.com or visit www.ipsos-nmr.com.

NPDFashionworld, Port Washington, N.Y., has launched Athletic Footwear Solution Folders, a dedicated **athletic footwear presence on its Web site**. At www.npdfashionworld.com, subscribers now gain access to point-of-sale and consumer information for women's, men's, and children's athletic footwear.

The Consumer Network, a Philadelphia research firm, and The Grand Group, a Chicago marketing agency, have released a **report on brand-consumer relationships** for major brands in 40 product categories ranging from airlines to underwear. The Brand Involvement report includes capsule descriptions of each brand as well as verbatim comments from consumers who participated in research conducted during development of the report. For more information call Mona Doyle at 215-235-2400.

TeleSage Inc., a Seattle survey software firm, has formed a partnership with Fisher Communications, a Seattle communications and media company that allows TeleSage to **host research projects at a secure facility** in the Fisher Plaza. Through this partnership, TeleSage expects to introduce market research companies to the benefits of using interactive voice response and Internet surveys for the exchange of information with consumers. For more information call 800-636-8524 or visit www.telesage.com.

continued from p. 16

is a case where you have membership from more than one group. For ease of understanding, we are going to restrict our case to a simple discriminant with definition of two groups.

Characteristics of the grouping variable are simple. They are distinct, mutually exclusive, and exhaustive. In the case of my client's request, either a respondent is in the target group or he isn't. No fence-sitting. No overlapping.

Basic data assumptions of the predictor variables are that they are normally distributed and independent.

Choosing which predictor variables will be included in the analysis requires a bit of marketing sense. For example, our client seeks to distinguish between high-probability customers and low-probability customers. Within the survey, respondents are asked to rate the company on a given array of attributes — rankings of importance, performance, company image, and firm demographics such as size, revenue, number of employees, and geographic area. A good analysis, especially if it is going to be used for back classification, cannot use all the data available. The results would be murky and there would be a good deal of variation error, commonly referred to as noise.

Therefore, it is vital to choose which predictors go into the equation. In our fictitious example, similar to the case above, attitudes toward the technical prowess of the firm, marketing support, customer service, size of firm, and revenues were chosen.

The output

The analysis produces a discriminant function. That is, a linear equation where coefficients are multiplied against the values of the predictor variables to produce a discriminant score. Derived from the discriminant score, a likelihood of each group membership is calculated based on past group membership. To put it simply, the respondent fills out the form and gets a score, which is then compared to a chart to see if he qualifies for the group.

As in all sophisticated statistical analysis, a blizzard of output accompanies the procedure. There are five outcomes that I examine and report: the beta scores of the discriminant function (known as the raw coefficients), the standardized coefficients, Wilk's Lambda, the discriminant score, and the percentage of respondents correctly reclassified based on the function once it is rerun.

The raw and standardized coefficients are used for descriptive and classification purposes. The discriminant score, when calculated afterwards, is the instrument used for future classification. Wilk's Lambda is a statistic that gives us the robustness of the model. Wilk's Lambda includes a chi-square test, which, if significant, says that the model has tested well and can be assumed strong and reasonably accurate. The percentage of correctly classified respondents tells us how many people returned to where they belong once rerun through the model. It, like Wilk's Lambda, is a measure of how good the model is.

The analysis — descriptive aspects

The groups are defined (potential customers and non-potential customers), the predictor variables are chosen and properly recoded and the analysis is run. My firm uses SPSS to perform the function. This, as I mentioned, produces a large amount of output. To make the outcome simple and actionable, we often transfer them to an Excel spreadsheet or PowerPoint slides which are easy for our clients to understand and incorporate into their reports.

Figure 1

Variables Present in Model Equation	Standardized Canonical Discriminant Function Coefficients
Availability of training and educational services	0.590
Strong marketing support	0.537
Solid technical suppor	0.032
Size of firm in annual revenue ($)	0.032
Highly quality customer service	-0.103

Figure 1 shows the five parameters of our fictitious example, ranked in descending order. Figure 2 is a graphic display.

From here I will walk through the example in the same order as if I were delivering it to a client. The first output I would report, for descriptive purposes, is the standardized coefficients.

For interpreting the standardized coefficients it is more useful to look at them relative to each other. "Availability of training and educational services" has a coefficient of .590. The next attribute, "Strong marketing support" has a coefficient of .537. What this means is that these two attributes are the strongest indicators of membership to the group. "Solid technical support" (.032), "Size of firm in annual revenue" (.032), and "High-quality customer service" (-.103), are near zero and, thus, not strong indicators.

The strengths of the standardized coefficients are relative to each other. A rule is that if a predictor has twice the standardized coefficient of another predictor, it is twice as good

Figure 2

Training and Strong Marketing Support are the Most Powerful Discriminators of Key Group

Discriminant Analysis

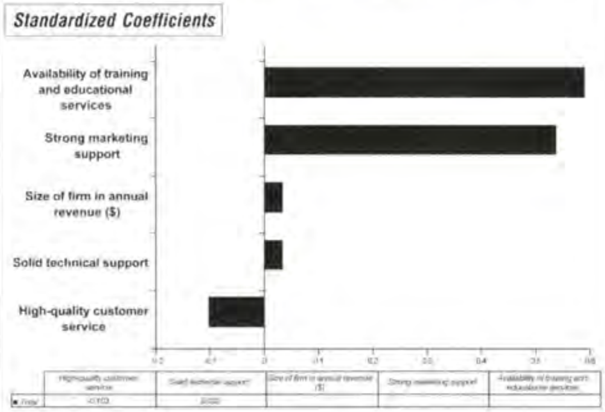


Figure 3

Variables Present in Model Equation	Raw Canonical Discriminant Function Coefficients
Availability of training and educational services	1.160
Strong marketing support	0.902
Size of firm in annual revenue ($)	0.072
Solid technical suppor	0.067
Highly quality customer service	-0.273

a discriminator for the group. Predictors near zero have little effect. Figure 2 graphically displays these results.

The marketing interpretation for this model is clear. Technical support, size of the company, and customer service are not a major concern to customers when approaching potential suppliers. Though determined conclusively through regression analysis, another conclusion is that if the respondent believes the company has good training and marketing support, he is probably a good candidate to become a customer.

Figure 3 displays raw coefficients. These can be descriptive too, though I tend to use the standardized coefficients for pure descriptive purposes (due to differing scales among the predictor variables; "standardized" gives each predictor a mean of 0 and a standard deviation of 1). Unlike standardized, raw coefficients serve a dual function. They are also used in the re-classification phase.

Figure 4

Wilks' Lambda	Chi-square	Sig.
0.241	133.023	0.000

67.4% of original grouped cases correctly classified

Finally, it is useful to assess the model itself. Shown also in Figure 4 is the Wilk's Lambda and the percentage reclassified correctly. The Wilk's Lambda is clearly significant. Look at the "Sig." column, which reads something like "This is the chance the model is zero, or meaningless." In our example the Sig. is 0.000, or 0 percent chance. Generally I accept any model with a Wilk's Lambda Sig. less than 10 percent. With more than two-thirds, 67.4 percent, of respondents being correctly reclassified, we can be confident that model is robust and the process a good fit.

The analysis — predictive aspects

Great. We have the discriminators. The client now wants to be able to reclassify future studies according to the groups already in existence. In addition, for a purely promotional application, the client wants to be able to phone a potential customer, ask him a few questions, and determine if he is a good candidate for a follow-up.

First fact: In order to successfully perform a re-classification, you must ask exactly the same questions that are present in the model. Also, you must use the same scales.

The process is as follows: Ask the questions and plug the answers back into the equation. The model will produce a discriminant score. The prior run has produced a look-up table of sorts which shows discriminant scores and the likelihood

Figure 5

	Discriminant Coefficients	Attribute	Score Contribution
Availability of training and educational services	1.160	4	4.640
Strong marketing support	0.902	4	3.608
Size of firm in annual revenue ($)	0.072	2	0.144
Solid technical support	0.067	3	0.201
Highly quality customer service	-0.273	3	-0.819
	Discriminant Score		7.774

Key For Rating Variables
5=Extremely Satisfied
4=Very Satisfied
3=Somewhat Satisfied
2=Very Unsatisfied
1=Extemely Unsatisfied
0=Don't know

Annual revenues ($)
1=$1,000,000 or Under
2=$1,000,000 to $5,000,000
3=$5,000,000 or More

Figure 6

Discriminant Score (From Calculation Table)	Probabilities of Membership in Customer Group
10.45	100.0%
9.20	100.0%
8.40	99.0%
8.35	98.0%
8.24	92.8%
8.12	87.6%
8.01	82.4%
7.90	77.2%
7.79	72.0%
7.67	66.8%
7.56	61.6%
7.45	56.4%
7.33	51.2%
7.22	46.0%
7.11	40.8%
6.99	35.6%
6.88	30.4%
6.77	25.2%
6.66	20.0%
6.54	14.8%
6.43	9.6%
6.31	5.0%
6.26	4.0%
5.03	0.0%
4.60	0.0%
4.55	0.0%
4.22	0.0%
4.17	0.0%
3.37	0.0%
2.09	0.0%
1.93	0.0%

of a person with that score joining the group. In practice, if a given respondent has a score with a corresponding likelihood higher than 50 percent, put him in the group.

For a large number of respondents, my firm will write a small SPSS syntax program so that the process of re-classification for a large number of data will become automated. That is, the banner points can be re-created from the previous study.

For individual respondents an Excel spreadsheet calculator is built. Shown in Figure 5, it is used to calculate the discriminant score and then compare the derived value to the values that are presented in the look-up table. This is used for a client who wishes, say, to phone a prospective customer, ask him a few questions, and then decide if he has a reasonable chance of becoming a real customer.

In our example, the respondent has a score of 7.774. We go to Figure 6 — output from SPSS which gives calculated, existing discriminant scores and the probability a respondent with that score will end up in the group — and find that this score corresponds with a likelihood between 67 percent and 72 percent to belong to our target group. Conclusion: call him back.

Useful and popular

Discriminant analysis is one a number of statistical techniques that we offer to our clients in order to add value to existing projects or pre-plan for a larger data delivery within the context of expected output. The power and efficiency of the process allows strategic planners to capitalize on the existing data to explain and predict consumer conduct without consulting a mystic. It is among our more useful and popular techniques given its power and ease of use.

continued from p. 20

group, or they fall into the "I tried it once, I didn't like it, and I am never doing it again" category.

Well-moderated online focus groups are not free-for-all chat fests, and they are not boring. If that's been your experience, you've been working with the wrong vendor. When properly designed and executed, virtual groups are structured discussions, much like you have when people are seated around a table, with the added bonus that everyone can "talk" at once.

Participants quickly learn that they can both respond to the moderator and to their fellow participants, which generates some very enlightening dialogue. There is, in fact, a sense of community in online focus groups, which cannot always be achieved in traditional groups. Yet this is not a community with a "herd mentality." It is one where people are more at ease challenging each other's points of view because they are anonymous. The dynamics of the online group enable us to accumulate even more data than is often possible in traditional groups. And, it's not just more words being said; the data are rich, in-depth and actionable.

Some people raise the specter of a "powerless moderator," who can't control the online participants. They characterize the moderator as being helpless and lacking the authority to direct and control the group. The truth is, the quality of the moderator is not a function of the methodology but, rather, depends on her experience and expertise. In-person moderators have as much opportunity to lose control of the group as online moderators — no more and no less. In fact, sometimes it is easier to keep control online, especially if the virtual focus facility has a "mute" key and a "boot" key.

Technology vs. participants

Participants don't need to be Mavis Beacon-level typists to provide good information during a group. Two fingers work quite well and, judging from the length of the transcripts we typically get, participants are not being held back by their typing skills. There may be some sort of self-selection going on (i.e., the people who agree to participate are the better typists), but it's rare these days to find people who have Internet access who can't bang out their ideas in one way or another.

Visual materials display quite well on the Internet, including ads (print and banner), concepts, Web sites, and message statements. What's more, being able to change exhibits between groups is much easier on the Internet than in-person. More energy can be put toward creating new visuals, rather than figuring out how to get them to the moderator the next day. Security is also less of an issue today because the technology exists for curtailing copying of exhibits.

My clients aren't asking

In all my years of research, I can't think of another methodology that was ignored because clients didn't ask for it. Most clients want the best data they can get and, while some might suggest and even fewer dictate the methodology to be used, most are looking to us researchers to recommend the best approach.

After I work with clients on their first set of online groups, I find they loved them! Why? First, many more clients can observe the groups in real-time than is possible in traditional groups because the time and cost of travel are prohibitive. And the more observers, the greater the likelihood that clients will believe and be ready to act on the research results. Second, clients can provide instant and unobtrusive input at any time during the group, by sending private messages to the moderator. Third, clients can "talk" among themselves during the group, even if they are not in the same location. Of course, that means the boss may be more involved than is customary with traditional groups, but it also means she can't complain about the results!

Nothing is perfect

While I have extolled the virtues of online groups, I cannot claim that they are always appropriate over traditional groups. Most people don't have the bandwidth for video clips, and three-dimensional exhibits cannot be displayed. It's not always possible to find the target population online and, just as you can have a blizzard in New York in March that prevents people from getting to traditional groups, the Internet is not perfectly reliable, which brings me back to my original question.

Ask yourself whether you are judging this methodology fairly or holding it to a higher standard than other methodologies. After all, just like there are good telephone data collection agencies and bad ones, there are good practitioners of this methodology and bad ones. And when we get one of the bad ones, we simply don't use them again. It doesn't mean we abandon the methodology!

Are online focus groups the answer to all of our qualitative research prayers? Certainly not! But whether you are for or against their use, online focus groups are not only here to stay, their use is actually increasing, if for no other reason than they save money, time, and travel. And, assuming that you are planning on continuing your career in research, adding this methodology to your market research toolbox makes more sense than closing your eyes and wishing it away.

Research In Action

Kmart's research has shown that African-American and Hispanic shoppers are among the retailer's most loyal customers. The company plans to launch a multicultural ad campaign to "strengthen the emotional bonds with these critical shoppers," said Steven Feuling, senior vice president of marketing at Kmart. In developing its current campaign, themed "Kmart. The Stuff of Life," Kmart conducted extensive research to determine drivers of loyalty within the category. The research found that the American mom (the heaviest shopper in this channel) wants more than just low prices or fun brands for her and her family. She wants a store that understands her life, one that makes her feel she belongs, and carries everything her family needs at a fair price. (PRNewswire)

Moderator MarketPlace™

Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 952-854-5101. Fax 952-854-8191. Or visit www.quirks.com/media/moderator.htm.

Jeff Anderson Consulting

Jeff Anderson Consulting, Inc.
P.O. Box 1744
La Jolla, CA 92038
Ph. 858-456-4898
Fax 858-454-4859
E-mail:
jeff@jeffandersonconsulting.com
Contact: Jeff Anderson, CPCM, MBA
"Blending Art With Science." Member QRCA/AMA.

Audience Insights
42 Lake Ave.
Framingham, MA 01702
Ph. 508-879-3435
Fax 253-322-4603
E-mail: oneill11@rcn.com
Contact: Kevin O'Neill
Full-Svc. Qual. & Quant. High-Tech., Media, Ent.

AutoPacific.

AutoPacific, Inc.
2991 Dow Ave.
Tustin, CA 92780
Ph. 714-838-4234
Fax 714-838-4260
E-mail: gpeterson@autopacific.com
www.autopacific.com
Contact: George Peterson
Auto Marketing & Product Experts. 2,000 Groups Moderate & Recruit.

BAIGLOBAL Qualitative MarketView℠

BAIGlobal Inc.
580 White Plains Rd.
Tarrytown, NY 10591
Ph. 914-332-5300
Fax 914-631-8300
E-mail: kpermut@baiglobal.com
Contact: Kate Permut
Contact: Steve Wolf
Maximize The Power Of Your Qualitative And Get The Clear, Concise Results You Need For Real Business Decision-Making.

Burr Research
1130 40th St.
Bellingham, WA 98226-3118
Ph. 360-671-7813
Fax 360-671-7813
E-mail: BURRRESEAR@aol.com
Contact: Robert L. Burr, FLMI, CLU
Providing Answers Via Actionable Survey, Focus Group, & In-Depth Research. Financial Services Specialty. 30+ Yrs. Experience.

C R Market Surveys
9510 S. Constance, Ste. C-6
Chicago, IL 60617
Ph. 773-933-0548
Fax 773-933-0558
E-mail: crobinson@crmarket.com
www.crmarket.com
Contact: Cherlyn Robinson
African-Amer. Mod. Who Specializes In African-Amer. Qual. Rsch. Svcs.

C.J. Robbins Research
3832 Mintwood St.
Pittsburgh, PA 15201
Ph. 412-683-5975
E-mail: cjrobbins@activefocus.com
www.activefocus.com
Contact: Carole J. Robbins
Member: National Assoc. of Practicing Anthropologists & Qualitative Research Consultants Assoc. (QRCA).

C&R RESEARCH

C&R Research Services, Inc.
500 N. Michigan Ave. 12th fl.
Chicago, IL 60611
Ph. 312-828-9200
Fax 312-527-3113
E-mail: info@crresearch.com
www.cr-research.com
Contact: Amy Fliegelman
Leading Supplier Of Qual. Rsch. In The U.S. With Over 40 Yrs. of Experience.

CALO
RESEARCH SERVICES

Calo Research Services
10250 Alliance Rd.
Cincinnati, OH 45242
Ph. 513-984-9708
Fax 513-792-7404
E-mail: ncalo@caloresearch.com
www.caloresearch.com
Contact: Nick Calo
15+ Years B2B, Tech, Legal/Graduate Degrees Psych. & Marketing/Recruit Nationally From One Location.

Cambridge Associates, Ltd.
2315 Fairway Ln.
Greeley, CO 80634
Ph. 800-934-8125
Fax 970-339-8313
E-mail: walt@postslot.com
www.focusgroupguru.com
Contact: Walt Kendall
Focus Groups, Conjoint Analysis, Surveys. Call To Discover The Difference.

Cambridge Research, Inc.
3521 W. 24th St.
Minneapolis, MN 55416
Ph. 612-929-8450
Fax 612-929-8460
E-mail: dalelongfellow@cambridgeresearch.com
www.cambridgeresearch.com
Contact: Dale Longfellow
High Tech, Executives, Bus.-To-Bus., Ag., Specifying Engineers.

campos
market research

Campos Market Research, Inc.
216 Blvd. of the Allies
Pittsburgh, PA 15222-1619
Ph. 412-471-8484, ext. 507
Fax 412-471-8497
E-mail: marylou@campos.com
www.campos.com
Contact: Mary Lou Harju
Full-Service Market Research. Custom Qual., Quant. & Online Rsch.

Chamberlain Research Consultants
710 John Nolen Dr.
Madison, WI 53713
Ph. 800-246-9779
Fax 877-549-5990
E-mail: quirks@crcwis.com
www.crcwis.com
Contact: Sharon R. Chamberlain
Contact: Tyler J. Walker
Over 15 Yrs. Experience Throughout the U.S. Market: Mock Trials, Consumer Products, Name Dev., Sensitive Issues.

Cheskin
255 Shoreline Dr., Suite 350
Redwood Shores, CA 94065
Ph. 650-802-2100
Fax 650-593-1125
E-mail: fkorzenny@cheskin.com
www.cheskin.com
Contact: Felipe Korzenny, Ph.D.
Strategic Rsch. Consultants Specializing in Tech & Consumer Goods in General, B2B, Youth, Hispanic & Asian Markets.

Competitive Edge
309 Calle Neblina
San Clemente, CA 92708
Ph. 949-498-0122
Fax 949-498-0122
E-mail: sheilake@aol.com
www.CompetitiveEdge.com
Contact: Sheila Kessler, Ph.D.
B2B; Hi-Tech; Full-Service; Customer Needs/Satisfaction; Focus; ISO.

Consumer Focus LLC
660 Preston Forest Center, #197
Dallas, TX 75230-2718
Ph. 214-542-8787
Fax 214-691-6021
E-mail:
sstewart@consumerfocusco.com
www.consumerfocusco.com
Contact: Sue Stewart
20 Years of Experience in Financial Services Direct Marketing.

ConsumerSpeak
4565 Lanercost Way
Columbus, OH 43220
Ph. 614-326-2107
Fax 614-326-2107
E-mail: kpopp@columbus.rr.com
Contact: Kathy Popp
Expert Moderator & Marketer with More Than 15 Years of Experience! Great Groups, Insights & Reports!

Creative Focus Inc.

Creative Focus, Inc.
1120 Hope Rd., Suite 150
Atlanta, GA 30350
Ph. 404-256-7000
Fax 770-594-2475
E-mail: vardis@mindspring.com
www.creativefocus.net
Contact: Harry Vardis
Name Development Via Int'l. Panel. Full-Service Qualitative.

Cultural Insights Services, Inc.
10510 Buckeye Trace
Goshen, KY 40026
Ph. 502-228-3708
Fax 502-228-2829
E-mail: listening@culturalinsights.com
Contact: Michael C. Sack
Cultural Insights® is a Visual Psychological Approach Helping Define and Apply Cultural Perceptions.

Daniel Associates
49 Hill Rd., Ste. 4
Belmont, MA 02478
Ph. 617-484-6225
Fax 800-243-3493
E-mail: sdaniel@earthlink.net
http://home.earthlink.net/~sdaniel/
Contact: Stephen Daniel
FOCUS/IT Understanding Technology Buying Processes.

Data & Management Counsel, Inc.
P.O. Box 1609 / 135 Commons Ct.
Chadds Ford, PA 19317
Ph. 610-459-4700
Fax 610-459-4825
E-mail: info@DMChome.com
www.DMChome.com
Contact: Bill Ziff-Levine
Extensive Experience In Domestic & International Qualitative Research.

Moderator MarketPlace™

Decision Drivers
197 Macy Rd.
Briarcliff, NY 10510-1017
Ph. 914-923-0266
Fax 914-923-3699
Contact: Sharon Driver
Actionable Results To Drive Your Market Decisions.

design•forum. research

Design Forum Research
7575 Paragon Rd.
Dayton, OH 45459
Ph. 937-439-4400
Fax 937-439-4340
E-mail: pvanderburgh@designforum.com
www.designforum.com
Contact: Paul Vanderburgh
Design Forum Is Your Full-Service Source For All Your Consumer or B2B Research Needs.

DIRECT FEEDBACK

Direct Feedback, Inc.
Four Station Square, Ste. 545
Pittsburgh, PA 15219
Ph. 800-519-2739
Fax 412-394-3660
E-mail: amav@dfresearch.com
www.dfresearch.com
Contact: Alan Mavretish
New Product. Advertising and B-to-B. Custom Design/Analysis.

Dolobowsky Qualitative Services, Inc.
94 Lincoln St.
Waltham, MA 02451
Ph. 781-647-0872
Fax 781-647-0264
E-mail: reva@doloqual.com
www.doloqual.com
Contact: Reva Dolobowsky
Experts In Ideation & Focus Groups. For 20+ Years.

D/R/S Health Care Consultants
121 Greenwich Rd., Ste. 209
Charlotte, NC 28211
Ph. 704-362-5211
Fax 704-362-5216
E-mail: drsimon@mindspring.com
Contact: Dr. Murray Simon
Qualitative Market Research By A Former Provider.

encuesta

Encuesta, Inc.
(Formerly Target Market Research Grp.)
4990 S.W. 72 Ave., Ste. 110
Miami, FL 33155-5524
Ph. 800-500-1492
Fax 305-661-9966
E-mail: martin.cerda@encuesta.com
www.encuesta.com
Contact: Martin Cerda
Hispanic Qual./Quant. Research-National Capability.

Erlich Transcultural Consultants
21241 Ventura Blvd., Ste. 193
Woodland Hills, CA 91364
Ph. 818-226-1333
Fax 818-226-1338
E-mail: info@etcethnic.com
www.etcethnic.com
Contact: Andrew Erlich, Ph.D.
Full Svc. Latino, Asian, African-Amer., Amer. Indian Mktg. Rsch.

Essman/Research
100 E. Grand, Ste. 340
Des Moines, IA 50309-1800
Ph. 515-282-7145
Fax 515-282-4535
E-mail: mail@eassoc.com
www.eassoc.com
Contact: Deborah Stearns, Rsch. Dir.
Full-Svc. Qual. & Quant. Rsch./New Facilities/Moderators.

FADER & ASSOCIATES

Fader & Associates
372 Central Park W., Ste. 7N
New York, NY 10025
Ph. 212-749-3986
Fax 212-749-4087
E-mail: faderassoc@aol.com
Contact: Linda Hu
Exp. In Broad Range of Categories, New Products, Repositioning, Concept Dev., Creative Diag.

FOCUS LATINO

Focus Latino
1617 Cabinwood Cove
Austin, TX 78746
Ph. 512-306-7393
Fax 512-328-6844
E-mail: gcafocuslatino@austin.rr.com
Contact: Guy Antonioli
Contact: Beatriz Noriega
Specialize in Qualitative Hispanic Consumer Research.

FOCUSED Marketing Research, Inc.
P.O. Box 290
Bedminster, PA 18910-0290
Ph. 215-795-9993
Fax 215-795-9992
E-mail: vpd@focusedmr.com
www.focusedmr.com
Contact: Vern Dougherty
Insightful Analysis & Actionable Reports. Consumer, B-to-B, Internet, Rx & Pets Products. Call Us Today!

Franklin Communications
200 Valley Rd.
Mt. Arlington, NJ 07856
Ph. 973-601-0111
Fax 973-601-0109
E-mail: michael@fc4research.com
www.fc4research.com
Contact: Michael Franklin
Specializing in Healthcare Research Since 1982.

GQG
One World Trade Center
121 S.W. Salmon St., 11th floor
Portland, OR 97204
Ph. 503-471-1397 or 503-784-5110
Fax 800-878-1422 or 253-681-8102
E-mail: ghansen@gqg-mr.com
www.gqg-mr.com
Contact: Greg Hansen
Focus Grps./In-Depths/Dyads/Triads/Online For Technology & Telecomm. Also Edu., Utilities, Gov't., Health care. Design/Mgmt./Recruit/Mod./Analysis/Report.

graffgroup

Graff Group
10178 Phaeton Dr.
Eden Prairie, MN 55347
Ph. 952-829-4640
Fax 952-829-4645
E-mail: carol@graffgroup.com
www.graffgroup.com
Contact: Carol Graff
Partnering with Market Leaders to Deliver Qualitative Market, Customer & Competitive Intelligence, Focusing on Bus.-to-Bus. Challenges & Opportunities.

Henceforth, Inc.
3412 Hopkins Crossroad
Minnetonka, MN 55305-4305
Ph. 952-938-1948
Fax 952-938-2098
E-mail: hence4th@att.net
www.henceforthinc.com
Contact: Judith Hence
Responsive Interviews. Actionable Results. Certified Minority Business Enterprise.

Hispanic Research Inc.

Hispanic Research Inc.
1 Springfield Rd.
East Brunswick, NJ 08816
Ph. 732-613-0060
Fax 732-613-8612
E-mail: info@hispanic-research.com
www.hispanic-research.com
Contact: Ricardo A. Lopez
Consulting Firm Specializing In U.S. Hispanic Market. Serving Firms Targeting U.S. Latino Market. Offices: Miami/New York.

HYPNOSIS FOCUS GROUPS

Hypnosis Focus Groups
39 Acacia Tree Lane
Irvine, CA 92612
Ph. 800-646-4041 or 949-551-3400
Fax 949-551-3419
E-mail: hgqandqres@aol.com
www.hypnosisfocusgroups.com
Contact: Hal Goldberg
Free Demo Video, Fortune 500 & Major Ad Agency References.

Image Engineering

Image Engineering, Inc.
10510 Buckeye Trace
Goshen, KY 40026
Ph. 502-228-1858
Fax 502-228-2829
E-mail: listening@imageengineering.net
www.imageengineering.net
Contact: Michael C. Sack
Image Engineering's Unique Visual Approach Uncovers Consumer Insights Unattainable Via Traditional Approaches.

insight europe gmbh
Turmstr. 5
60385 Frankfurt
Germany
Ph. +49-69-956366-0
Fax +49-69-956366-11
E-mail: eva@insighteurope.de
www.insighteurope.de
Contact: Eva Caspary
International Full-Service Institute, European Coordination, In-House German and French Moderators, Also Bilinguals.

Insight Research Associates
500 N. Wells St., Ste. 300
Chicago, IL 60610
Ph. 312-595-9500
Fax 312-595-9980
E-mail: insight@insightresearch.net
www.insightresearch.net
Contact: Mark Ingwer, President
Full-Service Qualitative Research. B2B, Kids/Teens, Financial, Healthcare, Technology, Niche & Media.

Knowledge Systems & Research, Inc.
500 South Salina St., Ste. 900
Syracuse, NY 13202
Ph. 315-470-1350
Fax 315-471-0115
E-mail: HQ@krsinc.com
www.krsinc.com
Contact: Lynne Van Dyke
Full-Svc./All Expertise In-House/Strategic Focus/B2B.

Leflein Associates, Inc.
1 Bridge Plaza
Fort Lee, NJ 07024
Ph. 201-363-1661
Fax 201-363-1663
E-mail: bleflein@leflein.com
www.leflein.com
Contact: Barbara Leflein
Strategic Focus. Experience In Broad Range of Categories.

Leichliter Ascts. Mkt. Rsch./Idea Dev.
P.O. Box 788 FDR Station
New York, NY 10150-0788
Ph. 212-753-2099
Fax 212-753-2599
E-mail: leichliter@aol.com
www.leichliter.com
Contact: Betsy Leichliter
High-Yield Focus Grps., Interviews, Worksessions. Classic & New Approaches. Face-to-Face/Phone/Internet. NYC & Chicago Offices, Global Resources.

Moderator MarketPlace™

Loretta Marketing Group
13935 S.W. 102 Court
Miami, FL 33176
Ph. 305-232-5002
Fax 305-232-8010
E-mail: lmg8010@bellsouth.net
Contact: Jim Loretta
U.S. Hispanic/Latin Amer. Consumer Rsch. 25 Yrs. Exp. Bilingual/Bicultural. Born in Mexico/Educated in the U.S.

Low + Associates, Inc.
5454 Wisconsin Ave., Ste. 1400
Chevy Chase, MD 20815
Ph. 301-951-9200
Fax 301-986-1641
E-mail: nrussell@lowassociates.com
www.lowassociates.com
Contact: Nan Russell, V.P. Mkt. Intel.
Health/Fin./Cust. Sat. Upscale FG Facility. Recruit from MD, DC, N. VA.

Market Navigation, Inc.
60 Dutch Hill Rd.
Orangeburg, NY 10962
Ph. 845-365-1391 ext. 228
Fax 845-365-1022
E-mail: eve@mnav.com
E-mail: grs@mnav.com
www.mnav.com
Contact: Eve Zukergood, CEO
Contact: George Silverman
A Diverse Qual. & Mktg. Company Specializing In The Customer Decision Process, Optimizing Word-of-Mouth, & Practical Innovation at Low Cost.

MARKETING ADVANTAGE RESEARCH CONSULTANTS

Marketing Advantage Rsch. Cnslts., Inc.
2349 N. Lafayette St.
Arlington Heights, IL 60004
Ph. 847-670-9602 or 800-935-4220
Fax 847-670-9629
E-mail: mjrichards@aol.com
Contact: Marilyn Richards
New Product Development/High-Tech/Internet/Telecomm.

Marketing Matrix International, Inc.
2566 Overland Ave., Ste. 675
Los Angeles, CA 90064
Ph. 310-842-8312
Fax 310-842-7212
E-mail: moran@markmatrix.com
Contact: Marcia Selz, Ph.D.
Foc. Grps., In-Depth Intvs. & Surveys For Financial Svce. Companies.

MCC Qualitative Consulting
100 Plaza Dr.
Secaucus, NJ 07094
Ph. 201-865-4900 or 800-998-4777
Fax 201-865-0408
E-mail: aschrager@meadowcc.com
Contact: Andrea Schrager
Insightful, Innovative, Impactful, Action-Oriented Team Approach.

Meczka Marketing/Research/Cnsltg., Inc.
5757 W. Century Blvd., Lobby Level
Los Angeles, CA 90045
Ph. 310-670-4824
Fax 310-410-0780
E-mail: adiaz@mmrcinc.com
www.mmrcinc.com
Contact: Anthony Diaz
Qual./Quant. Rsch. 25 Yrs. Exp. Recruit & Facility.

MedProbe™ Inc.
600 S. Hwy. 169, Ste. 1410
Minneapolis, MN 55426-1218
Ph. 952-540-0718
Fax 952-540-0721
E-mail: MedPr@aol.com
Contact: Asta Gersovitz, Pharm.D.
MedProbe™ Provides Full Qualitative & Advanced Quantitative Market Research Including SHARECAST & SHAREMAP.

Michelson & Associates, Inc.
Strategic Marketing Research

Michelson & Associates, Inc.
1900 The Exchange, Ste. 360
Atlanta, GA 30339
Ph. 770-955-5400
Fax 770-955-5040
E-mail: mark@michelson.com
www.michelson.com/research
Contact: Mark L. Michelson
Much More Than Moderation, Inspired Global Thinking.

MILLENNIUM

Millennium Research, Inc.
7493 W. 147th St., Ste. 201
Apple Valley, MN 55124
Ph. 952-431-6320
Fax 952-431-6322
E-mail:
jjohnson@millenniumresearchinc.com
www.millenniumresearchinc.com
Contact: Jan Johnson
Nat'l. & Int'l. Focus Groups, Executive Interviews, Fast Turnaround.

Francesca Moscatelli, M.S.
6 Hemlock Rd.
South Salem, NY 10590
Ph. 914-629-2162
Fax 914-533-2244
E-mail: romana@optonline.net
Contact: Francesca Moscatelli
Latino Bi-Lingual/Bi-Cultural Groups; QRCA Member.

Outsmart Marketing
2840 Xenwood Ave.
Minneapolis, MN 55416
Ph. 952-924-0053
Fax 952-924-0920
Contact: Paul Tuchman
Twelve Years of Full-Service Nationwide Research.

Primary Insights, Inc.
801 Warrenville Rd., Ste. 185
Lisle, IL 60532
Ph. 630-963-8700
Fax 630-963-8756
E-mail: info@primaryinsights.com
www.primaryinsights.com
Contact: Deb Casey
Sensitive Topics. Ideation. In-Depth Analysis. Action-Oriented Recommendations.

The Research Department
220 E. 73rd St., Ste. 7D
New York, NY 10021
Ph. 212-717-6087
Fax 212-717-6382
E-mail: alexabsmith@earthlink.net
Contact: Alexa Smith
Experienced Specialist in Full-Svc. Qual. Rsch. - Focus Grps., Indiv. Depth Interviews, Mini Grps. Skilled High Quality Moderating. Over 25 Yrs. Exp.

Research Inc.
3050 Royal Blvd. S., Ste. 120
Alpharetta, GA 30022
Ph. 770-619-9837
Fax 770-619-9874
E-mail:
dmcnamara@researchincorporated.com
www.researchincorporated.com
Contact: Debbie McNamara
Capturing Results for Real Business Solutions.

Jay L. Roth & Associates, Inc.

Jay L. Roth & Associates, Inc.
27 First St.
Syosset, NY 11791-2504
Ph. 516-921-3311
Fax 516-921-3861
E-mail: jay@jlrothassoc.com
Contact: Jay L. Roth
Expert Moderator & Marketer Delivers on Promises! More than 20 Years Experience! Great Groups, Insights & Reports!

SAURAGE
STRATEGIC MARKETING RESEARCH

Saurage Research
12946 Dairy Ashford
Sugar Land, TX 77478
Ph. 800-828-2943
Fax 281-494-0009
E-mail: ssaurage@SaurageResearch.com
www.SaurageResearch.com
Contact: Susan Saurage-Altenloh
Full-Service, Qual. & Quant., 20+ Years Exp., Strategy, Image, Branding, B2B, B2C, In-Person & Online.

SCHNELLER - Qualitative

Paul Schneller Qualitative LLC
300 Bleecker St., 3rd fl.
New York, NY 10014
Ph. 212-675-1631
www.gis.net/~answers
Contact: Paul Schneller
Full Array: Ads/Pkg Gds/Rx/B-to-B/ Consumer (14+ Years).

SIL Group
413 N.E. Third St.
Delray Beach, FL 33483
Ph. 561-997-7270
Fax 561-997-5844
E-mail: sil@silgroup.net
www.silgroup.net
Contact: Timm Sweeney
Qualitative Specialists Since 1983. Business-to-Business & International.

James Spanier Research
120 E. 75th St.
New York, NY 10021
Ph. 212-472-3766
E-mail: paninfo@ix.netcom.com
Contact: Jim Spanier
Excellent focus groups and interviews in many categories. Serving domestic and international clients since 1986.

Strategic Focus, Inc.
6456 N. Magnolia Ave.
Chicago, IL 60626
Ph. 773-973-7573
Fax 773-973-0378
E-mail: DonaJ@aol.com
Contact: Dona Vitale
Brand & Organizational Development Strategy, Target Audience Analysis, Message Communication Research.

Sunbelt Research Associates
1001 N. U.S. One, Ste. 310
Jupiter, FL 33477
Ph. 561-744-5662
E-mail: info@sunbeltresearch.com
www.sunbeltresearch.com
Contact: Barbara L. Allan
20+ Years Exp.; Business & Consumer Studies; Nat'l. & Int'l. Exp.

Turnstone Research, Inc.
570 Carved Terrace
Colorado Springs, CO 80919-1129
Ph. 719-266-0949
Fax 719-266-0946
Email: sandra@turnstoneresearch.com
www.turnstoneresearch.com
Contact: Sandra Trujillo
Qual. & Quant. Rsch. Focus Groups In Many Categories.

Understanding UnLtd.
816 Delta Ave.
Cincinnati, OH 45226
Ph. 513-871-4644
Fax 513-871-2292
E-mail: info@understanding-unltd.com
www.understanding-unltd.com
Contact: Dennie Patton
Contact: Susan Wissman
Full-Service Qual. Firm; 9 Moderators Design & Direct U.S. & Global Research; Concept/Positioning Develop. Specialty.

THE FUTURE
View Finders Market Research
www.view-finders.com

View Finders Market Research
11 Sandra Lane
Pearl River, NY 10965
Ph. 845-735-7022
Fax 845-735-7256
www.view-finders.com
Contact: Janet Gaines
Specializing in Advertising, Political, Consumer and Business-to-Business Research. Complete Project Management.

GEOGRAPHIC CROSS-INDEX OF MODERATORS

Refer to Preceding Pages For Address, Phone Number and Contact Name

California
Jeff Anderson Consulting, Inc.
AutoPacific, Inc.
Cheskin
Competitive Edge
Erlich Transcultural Consultants
Hypnosis Focus Groups
Marketing Matrix International, Inc.
Meczka Mktg./Rsch./Cnsltg., Inc.

Colorado
Cambridge Associates, Ltd.
Turnstone Research, Inc.

Florida
Encuesta, Inc.
Loretta Marketing Group
SIL Group
Sunbelt Research Associates, Inc.

Georgia
Creative Focus, Inc.
Michelson & Associates, Inc.
Research Inc.

Illinois
C R Market Surveys
C&R Research Services, Inc.
Insight Research Associates
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Marketing Advantage Rsch. Cnslts.
Primary Insights, Inc.
Strategic Focus, Inc.

Iowa
Essman/Research

Kentucky
Cultural Insights Services, Inc.
Image Engineering, Inc.

Maryland
Low + Associates, Inc.

Massachusetts
Audience Insights
Daniel Associates
Dolobowsky Qualitative Services, Inc.

Minnesota
Cambridge Research, Inc.
Graff Group
MedProbe™ Inc.
Millennium Research, Inc.
Outsmart Marketing

New Jersey
Franklin Communications
Hispanic Research Inc.
Leflein Associats, Inc.
MCC Qualitative Consulting

New York
BAIGlobal Inc.
Decision Drivers
Fader & Associates
Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch./Idea Dev.
Market Navigation, Inc.
Francesca Moscatelli, M.S.
The Research Department
Jay L Roth & Associates, Inc.
Paul Schneller Qualitative LLC
James Spanier Research
View Finders Market Research

North Carolina
D/R/S Health Care Consultants

Ohio
Calo Research Services
ConsumerSpeak
Design Forum Research
Understanding UnLtd.

Oregon
GQG

Pennsylvania
C.J. Robbins Research
Campos Market Research, Inc.
Data & Management Counsel, Inc.
Direct Feedback, Inc.
FOCUSED Marketing Research, Inc.

Texas
Consumer Focus LLC
Focus Latino
Saurage Research

Washington
Burr Research

Wisconsin
Chamberlain Research Consultants

Germany
insight europe gmbh

SPECIALTY CROSS-INDEX OF MODERATORS

Refer to Preceding Pages For Address, Phone Number and Contact Name

ADVERTISING
Jeff Anderson Consulting, Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Cultural Insights Services, Inc.
Decision Drivers
Erlich Transcultural Consultants
Fader & Associates
Focus Latino
GQG
Image Engineering, Inc.
Millennium Research, Inc.
Outsmart Marketing
The Research Department
Jay L. Roth Associates, Inc.
Saurage Research
Paul Schneller Qualitative LLC

AFRICAN-AMERICAN
C R Market Surveys
Cultural Insights Services, Inc.
Erlich Transcultural Consultants
Henceforth, Inc.
Image Engineering, Inc.

AGRICULTURE
Cambridge Associates, Ltd.
Cambridge Research, Inc.
FOCUSED Marketing Research, Inc.
Millennium Research, Inc.

ALCOHOLIC BEV.
C&R Research Services, Inc.
James Spanier Research

ARTS & CULTURE
Strategic Focus, Inc.

ASIAN
Cultural Insights Services, Inc.
Data & Management Counsel, Inc.
Erlich Transcultural Consultants

ASSOCIATIONS
Low + Associates, Inc.
Market Navigation, Inc.

AUTOMOTIVE
AutoPacific, Inc.
C&R Research Services, Inc.
Design Forum Research
Focus Latino
Erlich Transcultural Consultants
Matrixx Marketing-Research Div.

BIO-TECH
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.
MedProbe, Inc.

BRAND/CORPORATE IDENTITY
Primary Insights, Inc.

BUS.-TO-BUS.
Access Research, Inc.
BAIGlobal Inc.
C&R Research Services, Inc.
Calo Research Services
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Competitive Edge
Data & Management Counsel, Inc.
Fader & Associates
FOCUSED Marketing Research, Inc.
Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.
MCC Qualitative Consulting
Millennium Research, Inc.
The Research Department
Jay L. Roth Associates, Inc.
Saurage Research
Paul Schneller Qualitative LLC

CABLE
C&R Research Services, Inc.
Leflein Associates, Inc.

CHILDREN
C&R Research Services, Inc.
Cultural Insights Services, Inc.
Fader & Associates
Image Engineering, Inc.
Market Navigation, Inc.

COMMUNICATIONS RESEARCH
Cambridge Associates, Ltd.
ConsumerSpeak
Jay L. Roth Associates, Inc.

COMPUTERS/HARDWARE
GQG
Leichliter Ascts. Mkt. Rsch/Idea Dev.

Moderator MarketPlace™

COMPUTERS/MIS
Calo Research Services
Competitive Edge
Daniel Associates
Fader & Associates
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Marketing Advantage Rsch. Cnslts.

CONSUMERS
C&R Research Services, Inc.
Decision Drivers
Design Forum Research
Fader & Associates
Knowledge Systems & Research, Inc.
Marketing Advantage Rsch. Cnslts.
The Research Department
Jay L. Roth Associates, Inc.
Saurage Research

CUSTOMER SATISFACTION
BAIGlobal Inc.
Competitive Edge
GQG
Low + Associates, Inc.

DIRECT MARKETING
BAIGlobal Inc.
Consumer Focus LLC
Strategic Focus, Inc.

DISTRIBUTION
Burr Research

EDUCATION
Cambridge Associates, Ltd.
Leflein Associates, Inc.
Market Navigation, Inc.
Marketing Advantage Rsch. Cnslts.

EMPLOYEE
Primary Insights, Inc.
Turnstone Research, Inc.

ETHNIC/MULTICULTURAL RESEARCH
Cheskin

ETHNOGRAPHIC RESEARCH
Alexander + Parker
BAIGlobal Inc.
C&R Research Services, Inc.
Cheskin
Cultural Insights Services, Inc.
Image Engineering, Inc.
Primary Insights, Inc.

EXECUTIVES
BAIGlobal Inc.
C&R Research Services, Inc.
Calo Research Services
Decision Drivers
Fader & Associates
Image Engineering, Inc.
Low + Associates, Inc.
Market Navigation, Inc.
Marketing Advantage Rsch. Cnslts.
The Research Department
Jay L. Roth Associates, Inc.
Paul Schneller Qualitative LLC

FINANCIAL SERVICES
Jeff Anderson Consulting, Inc.
BAIGlobal Inc.
Burr Research
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Consumer Focus LLC
Fader & Associates
FOCUSED Marketing Research, Inc.
Henceforth, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Low + Associates, Inc.
Marketing Matrix International, Inc.
MCC Qualitative Consulting
Jay L. Roth Associates, Inc.
The Research Department

FOOD PRODUCTS/ NUTRITION
BAIGlobal Inc.
C.J. Robbins Research
C&R Research Services, Inc.
ConsumerSpeak
Image Engineering, Inc.
Outsmart Marketing
The Research Department
Jay L. Roth Associates, Inc.
Paul Schneller Qualitative LLC

HEALTH & BEAUTY PRODUCTS
BAIGlobal Inc.
C&R Research Services, Inc.
Cultural Insights Services, Inc.
Image Engineering, Inc.
Paul Schneller Qualitative LLC

HEALTH CARE
Jeff Anderson Consulting, Inc.
BAIGlobal Inc.
D/R/S Health Care Consultants
Erlich Transcultural Consultants
Fader & Associates
Focus Latino
Franklin Communications
Knowledge Systems & Research, Inc.
Low + Associates, Inc.
MedProbe™ Inc.
Saurage Research

HIGH-TECH
Jeff Anderson Consulting, Inc.
BAIGlobal Inc.
Calo Research Services
Cheskin
GQG
Leflein Associates, Inc.
Jay L. Roth Associates, Inc.
Saurage Research
James Spanier Research

HISPANIC
C&R Research Services, Inc.
Cheskin
Cultural Insights Services, Inc.
Data & Management Counsel, Inc.
Encuesta, Inc.
Erlich Transcultural Consultants
Focus Latino
Hispanic Research Inc.
Image Engineering, Inc.
Loretta Marketing Group
Francesca Moscatelli, M.S.

HOUSEHOLD PRODUCTS/CHORES
C&R Research Services, Inc.
The Research Department
Paul Schneller Qualitative LLC

HUMAN RESOURCES ORGANIZATIONAL DEV.
Primary Insights, Inc.

IDEA GENERATION
BAIGlobal Inc.
GQG
Image Engineering, Inc.
Primary Insights, Inc.

IMAGE STUDIES
Cambridge Associates, Ltd.
Cultural Insights Services, Inc.
Image Engineering, Inc.
Saurage Research

INSURANCE
Burr Research
Consumer Focus LLC
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Low + Associates, Inc.

INTERACTIVE PROD./ SERVICES/RETAILING
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Low + Associates, Inc.

INTERNATIONAL
Fader & Associates
Primary Insights, Inc.

INTERNET
BAIGlobal Inc.
C&R Research Services, Inc.
Calo Research Services
Fader & Associates
FOCUSED Marketing Research, Inc.
GQG
Image Engineering, Inc.
Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Low + Associates, Inc.
MCC Qualitative Consulting
Jay L. Roth Associates, Inc.

INTERNET SITE CONTENT & DESIGN
FOCUSED Marketing Research, Inc.

INVESTMENTS
Leichliter Ascts. Mkt. Rsch/Idea Dev.

LATIN AMERICA
Cultural Insights Services, Inc.
Loretta Marketing Group

MEDICAL PROFESSION
Cambridge Associates, Ltd.
D/R/S Health Care Consultants
Franklin Communications
Market Navigation, Inc.
Matrixx Marketing-Research Div.
MedProbe™ Inc.
Paul Schneller Qualitative LLC

MODERATOR TRAINING
Market Navigation, Inc.

MULTIMEDIA
Marketing Advantage Rsch. Cnslts.

NEW PRODUCT DEV.
BAIGlobal Inc.
C.J. Robbins Research
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cheskin
ConsumerSpeak
Cultural Insights Services, Inc.
Data & Management Counsel, Inc.
Fader & Associates
GQG
Leflein Associates, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.
Marketing Advantage Rsch. Cnslts.
Millennium Research, Inc.
Outsmart Marketing
Primary Insights, Inc.
The Research Department
Jay L. Roth Associates, Inc.
Saurage Research
Paul Schneller Qualitative LLC

NON-PROFIT
Leflein Associates, Inc.

OBSERVATIONAL RSCH.
Cultural Insights Services, Inc.
Primary Insights, Inc.

ONLINE FOCUS GROUPS
C&R Research Services, Inc.
Cambridge Associates, Ltd.Saurage Research

PACKAGED GOODS
BAIGlobal Inc.
C.J. Robbins Research
C&R Research Services, Inc.
Cheskin

ConsumerSpeak
Cultural Insights Services, Inc.
Image Engineering, Inc.
Jay L. Roth Associates, Inc.

PACKAGE DESIGN RESEARCH
C&R Research Services, Inc.
ConsumerSpeak
Cultural Insights Services, Inc.
Image Engineering, Inc.
The Research Department

PARENTS
Fader & Associates
Market Navigation, Inc.

PET PRODUCTS
C&R Research Services, Inc.
Cambridge Research, Inc.
FOCUSED Marketing Research, Inc.
Primary Insights, Inc.

PHARMACEUTICALS
BAIGlobal Inc.
C.J. Robbins Research
C&R Research Services, Inc.
Cambridge Associates, Ltd.
D/R/S Health Care Consultants
Fader & Associates
Focus Latino
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.
MCC Qualitative Consulting
MedProbe™ Inc.
Paul Schneller Qualitative LLC

POLITICAL/SOCIAL RESEARCH
Cambridge Associates, Ltd.
Cultural Insights Services, Inc.
Market Navigation, Inc.
Francesca Moscatelli, M.S.

POSITIONING RESEARCH
Outsmart Marketing
Paul Schneller Qualitative LLC

PUBLIC POLICY RSCH.
Cambridge Associates, Ltd.
Leflein Associates, Inc.

PUBLISHING
Cambridge Associates, Ltd.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.
Marketing Advantage Rsch. Cnslts.
James Spanier Research

QUALITATIVE END-USER TRAINING
Primary Insights, Inc.

RETAIL
BAIGlobal Inc.
Design Forum Research
Knowledge Systems & Research, Inc.
Leflein Associates, Inc.
MCC Qualitative Consulting

SENIORS
Burr Research
Cultural Insights Services, Inc.
Leflein Associates, Inc.
Primary Insights, Inc.

SMALL BUSINESS/ ENTREPRENEURS
FOCUSED Marketing Research, Inc.

SOFT DRINKS, BEER, WINE
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Jay L. Roth Associates, Inc.

SPORTS
FOCUSED Marketing Research, Inc.

STRATEGY DEVELOPMENT
Saurage Research
Paul Schneller Qualitative LLC

TEACHERS
Leflein Associates, Inc.
Market Navigation, Inc.

TEENAGERS
C&R Research Services, Inc.
Cultural Insights Services, Inc.
Fader & Associates
Focus Latino

TELECOMMUNICATIONS
BAIGlobal Inc.
Calo Research Services
Daniel Associates
GQG
Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Marketing Advantage Rsch. Cnslts.
MCC Qualitative Consulting
The Research Department
Jay L. Roth Associates, Inc.

TELECONFERENCING
Cambridge Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.

TELEPHONE FOCUS GROUPS
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.
MedProbe, Inc.
Millennium Research, Inc.

TOURISM/HOSPITALITY
Image Engineering, Inc.
Leflein Associates, Inc.

TOYS/GAMES
C&R Research Services, Inc.
Fader & Associates

TRANSPORTATION SERVICES
Low + Associates, Inc.
Strategic Focus, Inc.

TRAVEL
Cambridge Associates, Ltd.
Image Engineering, Inc.
James Spanier Research

UTILITIES
Cambridge Associates, Ltd.
Competitive Edge
Knowledge Systems & Research, Inc.
Jay L. Roth Associates, Inc.
Turnstone Research, Inc.

VETERINARY MEDICINE
FOCUSED Marketing Research, Inc.
Paul Schneller Qualitative LLC

WEALTHY
Leflein Associates, Inc.

YOUTH
IC&R Research Services, Inc.
Image Engineering, Inc.
Leflein Associates, Inc.

QUIRK'S Marketing Research Review

2002 Omnibus Research Directory

This directory was developed by mailing forms to those firms we identified as providers of omnibus studies. In addition to each company's vital information, we've included the names of the omnibus studies, the sample size (n =) and the frequency of the studies. As an added feature, firms have been cross-indexed by the markets their omnibus studies serve. The studies listed in this directory meet the following definition: An omnibus study is one in which the sponsoring research company defines the audience to be surveyed and the intervals between studies. Clients participate by submitting proprietary questions. Clients receive results only from their proprietary questions and general demographic questions.

2002 OMNIBUS DIRECTORY

ACNielsen Australia
ACNielsen Omnibus
ACNielsen Centre
11 Talavera Road
Macquarie Park, NSW 2113
Australia
Ph. 61-2-8873-7813
Fax 61-2-8873-7001
E-mail: acnielsen@acnielsen.com.au
www.acnielsen.com.au
Studies:
Face-to-Face Omnibus
n = 1,000, Frequency: 47/yr.
Telephone Omnibus
n = 2,050, Frequency: 26/yr.

Ad Hoc Research
1250 Guy, #900
Montreal, PQ H3H 2T4
Canada
Ph. 514-937-4040 ext. 117
Fax 514-935-7700
E-mail: marc.brunelle@adhoc-recherche.com
www.adhoc-research.com
Richard Saint-Pierre
Studies:
Omnibus Quebec Population
n = 500, Frequency: 4/yr.

Amarach Consulting
28 Upper Fitzwilliam Street
Dublin 2
Ireland
Ph. 353-1-661-9147
Fax 353-1-661-0312
E-mail: olivier.vanparys@amarach.com
www.amarach.com
Oliver Van Parys, Sr. Reseaarch Manager
Studies:
Consumer Trend Watch
n = 500, Frequency: 4/yr.
Business Trend Watch
n = 1,000, Frequency: 4/yr.

American Opinion Research
A Division of Integrated Marketing Services
279 Wall St.
Princeton, NJ 08540
Ph. 609-683-9055
Fax 609-683-8398
E-mail: lkaufman@lmsworld.com
www.lmsworld.com
Studies:
The Environmental Report
The Power of Children

AMI Hong Kong
9/F Leighton Centre
77 Leighton Road
Causeway Bay
Hong Kong
Ph. 852-2881-5388
Fax 852-2881-5918
E-mail: asiabus@ami-group.com
www.ami-group.com
Studies:
AsiaBus
n = 15,000, Frequency: 12/yr.

ARC Research Corporation
14 Commerce Dr.
Cranford, NJ 07016
Ph. 908-276-6300
Fax 908-276-1301
E-mail: amy@arcresearch.com
www.arcresearch.com
Studies:
Healthcare Purchase Process Among Consumers
Impact of Color in Yellow Page Ads
Business Communication Study
Yellow Pages in the Lawn & Garden Purchase Process
Yellow Page Font Size Study
Impact of White Knockout in the Yellow Pages
Yellow Pages in the Automotive Aftermarket
Yellow Pages in the Moving & Storage Industry
Yellow Pages in the Financial Service Industry

Baltic Data House
5/7 Akas Street
Riga 1011
Latvia
Ph. 371-7096300
Fax 371-7096314
E-mail: bdh@bdh.lv
www.bdh.lv
Karina Kolesnikova
Studies:
Baltic Omnibus
n = 3,000, Frequency: 12/yr.
Baltic Telebus
n = 1,500, Frequency: 50/yr.
Business Omnibus
n = 1,200, Frequency: 2/yr.

Berent Aps
Njalsgade 21G, 5
2300 Copenhagen S
Denmark
Ph. 45-32-64-12-00
Fax 45-32-64-12-09
E-mail: info@berent.dk
www.berent.dk
Studies:
Berent Omnibus Denmark
n = 500, Frequency: 52/yr.
Berent Omnibus Norway
n = 500, Frequency: 52/yr.
Berent Omnibus Sweden
n = 500, Frequency: 52/yr.
Berent Omnibus Findland
n = 500, Frequency: 52/yr.

Beta Research Corp.
6400 Jericho Tpke.
Syosset, NY 11791
Ph. 516-935-3800
Fax 516-935-4092
E-mail: beta@nybeta.com
www.nybeta.com
Manny Mallo, President
Studies:
Omni-Health

Beta Research, Inc.
18379 Main Blvd.
Los Gatos, CA 95033
Ph. 408-353-2665
Fax 408-353-6725
E-mail: info@beta-research.com
www.beta-reseach.com
Studies:
Medical Devices and Systems
Frequency: 2/yr.

BMRB International ltd
Hadley House
79-81 Uxbridge Road
Ealing, London W5 5SU
United Kingdom
Ph. 44-20-8566-5000
Fax 44-20-8579-9208
E-mail: access.omnibus@bmrb.co.uk
www.bmrb.co.uk
Bob Salmons, Access, Business Dev. Mgr.
Studies:
Access to Youth
n = 1,000, Frequency: 12/yr.
Access Online
n = 2,000, Frequency: 12/yr.
Access by Telephone
n = 2,000, Frequency: 5/yr.
Access Face-to-Face
n = 2,000, Frequency: 46/yr.
Access Global

Brandman Marketing Research & Consultancy
57 Igal Alon St.
Tel Aviv 67891
Israel
Ph. 972-3-689-8100
Fax 972-3-689-8101
E-mail: brandman@inter.net.il
Studies:
Hebrew Omnibus
n = 500, Frequency: 40/yr.
Arabic Omnibus
n = 500, Frequency: 10/yr.
Russian Omnibus
n = 500, Frequency: 10/yr.

BRC Field & Focus Services
1101 N. First St.
P.O. Box 13178
Phoenix, AZ 85002-3178
Ph. 602-258-4554
Fax 602-252-2729
E-mail: info@brc-field.com
www.brc-field.com
Earl de Berge, Research Director
Studies:
BusinessTRACK
n = 400, Frequency: 2/yr.
ConsumerTRACK
n = 700, Frequency: 4/yr.
HispanicTRACK
n = 500, Frequency: 2/yr.
MetroTRACK
n = 600, Frequency: 4/yr.

Irwin Broh & Associates
1011 E. Touhy Ave., Suite 450
Des Plaines, IL 60018
Ph. 847-297-7515
Fax 847-297-7847
E-mail: info@irwinbroh.com
www.irwinbroh.com
Dave Waitz, President
Studies:
Marcom
n = 5,000 - 40,000, Frequency: 3/yr.

Bruskin Research
*(See **RoperASW Fast Answers**)*

Business and Marketing Analytic Center
5 Nizhny Kislovskiy per., Arbat
125252 Moscow
Russia
Ph. 7-095-943-3666 or 7-095-198-9871
Fax 7-095-943-3666
E-mail: bma@bma.ru
www.bma.ru
Vladimir Fetsenko, Ph.D., Director
Studies:
B&M All-Russia Omnibus
n = 2,000

California Retail Survey
5121 Garfield Ave., #20
Sacramento, CA 95841
Ph. 916-331-3104
Fax 916-339-1438
E-mail: californiaretailsurvey@hotmail.com
www.californiaretailsurvey.netfirms.com
James Vaughn, President
Studies:
California Retail Survey, 2002 Edition

CARAVAN®
P.O. Box 183
Princeton, NJ 08542
Ph. 800-999-0213
Fax 800-759-5786
E-mail: caravan@prn.opinionresearch.com
www.orcinternational.com
Judi Lescher, Sr. Vice President
Studies:
CARAVAN®
n = 1,000/2,000, Frequency: 100/yr.
TEEN CARAVAN®
n = 250/500, Frequency: oncall/yr.
PRE-TEEN CARAVAN®
n = 250/500, Frequency: oncall/yr.

CARAVAN® - a twice-weekly telephone omnibus survey conducted among a national probability sample of 1,000 adults (2,000 per week). CARAVAN® offers fast turnaround, economical consumer research. The longest running omnibus in the marketplace, CARAVAN® is the ideal research vehicle for collecting valuable information on topics ranging from image measurement and advertising tracking to product awareness and concept testing. CARAVAN® also offers TEEN CARAVAN® and PRE-TEEN CARAVAN®. Visit our Web site at www.orcinternational.com for more information, or call 800-999-0213.
(See advertisement on p. 103)

Central Research Services, Inc. (CRS)
7-1-1 Nishi-Gotanda
Shinagawa-ku
Tokyo 141-0031
Japan
Ph. 81-3-5487-2311
Fax 81-3-5487-2316
E-mail: moonie@crs.or.jp
www.crs.or.jp
Muneharu Yotsui
Studies:
CRS Monthly Omnibus Survey
n = 1,400, Frequency: 12/yr.

CENTRIS℠
Santa Monica Studios
1817 Stanford
Santa Monica, CA 90404
Ph. 877-723-6874 (Toll-Free) or 310-264-8777
Fax 310-264-8776
E-mail: jkessel@centris.com
www.centris.com
Jerilyn Kessel, Director
Studies:
CENTRIS(SM) Telephone Omnibus
n = 1,000, Frequency: 52/yr.

CENTRIS℠ is a daily targeted national telephone omnibus survey tracking over 75 communications, entertainment and technology areas in more than 1,000 random households weekly. Customized crosstabs available in seven business days or less. Accumulated database of 250,000+ households available for data extracts, custom incidence or analytical reports, or follow-up studies.
(See advertisement on p. 101)

CID/Gallup, S.A.
50e 150s Colegio Medicos
Sabana Sur
San Jose
Costa Rica
Ph. 506-220-4101
Fax 506-231-2145
E-mail: cid@cidgallup.com
www.cidgallup.com
Studies:
CID Gallup Omnibus

Clickin Research
1201 W. 24th St., Suite 204
Austin, TX 78705
Ph. 512-236-9161 ext. 11
Fax 512-236-9191
E-mail: mrussell@clickinresearch.com
www.clickinresearch.com
Martha Russell, President
Studies:
Shopping Channel Preferences
n = 1,000, Frequency: 2/yr.
Convenience Retail
n = 1,000, Frequency: 2/yr.

Datum Internacional SA
Luis F. Villaran, 365 San Isidro
Lima 27
Peru
Ph. 51-1-421-8740 or 51-1-221-4355
Fax 51-1-221-5147
E-mail: datum@datum.com.pe
www.datum.com.pe
Studies:
Omnibus Datum
n = 1,100, Frequency: 12/yr.
Omnibus Lima
n = 400, Frequency: 12/yr.

Decima Research, Inc.
2345 Yong St., Suite 405
Toronto, ON M4P 2E5
Canada
Ph. 416-962-2013
Fax 416-962-0505
E-mail: info@decima.ca
www.decima.ca
Scott Cho, Dir. Online /Syndicated Svcs
Studies:
Decima Express Omnibus
n = 1,000 - 2,000, Frequency: 12/yr.

Digital Marketing Services
1305 S. State Hwy. 121
Lewisville, TX 75067
Ph. 972-874-5080
www.dmsdallas.com
Studies:
Opinion Place Omnibus
n = 1,000, Frequency: 36/yr.

Digital Research, Inc.
201 Lafayette Center
Kennebunk, ME 04043-1853
Ph. 207-985-7660
Fax 207-985-5569
E-mail: bob.domine@digitalresearch.com
www.digitalresearch.com
Jane Mount, Research Director
Studies:
Intertrack
n = 2,500, Frequency: 12/yr.

Direct Marketing Services Group, Inc.
413 Northeast Third St.
Delray Beach, FL 33483
Ph. 800-229-4921
Fax 800-599-5688
E-mail: dmsg@silgroup.net
www.silgroup.net
Arnold Sheer
Studies:
Hispanic Latino Omnibus
n = 1,000, Frequency: 26/yr.

DIRECTIONS Marketing Research & Services
28 Mohamed Kamel
El Harouny Street, 2nd floor
Nasar City, Cairo
Egypt
Ph. 20-2-287-6319
Fax 20-2-287-6397
E-mail: directions@directions.com.eg
www.directions.com.eg
Studies:
DIRECTIONS Omnibus
Frequency: 4/yr.

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

Equifax Direct Marketing Solutions, Inc.
1621 18th St., Suite 300
Denver, CO 80202
Ph. 303-298-5277
Fax 303-298-5633
E-mail: david.triggs@equifax.com
Dave Triggs
Studies:
Consumer Electronics Monitor - Consumer
n = 750, Frequency: 1/yr.
Consumer Electronics Monitor - Dealer
n = 350, Frequency: 1/yr.
Scout® Consumer Behavior Rsch. Program
Stage 1: Product Purchaser Screening
n = 200,000, Frequency: 4/yr.
Stage 2: Product Purchaser Follow-up
n = 25,000, Frequency: 4/yr.

forsa GmbH
Max-Beer-Strasse 2
10119 Berlin
Germany
Ph. 49-30-62882-0
Fax 49-30-62882-400
E-mail: bus@forsa.de
www.forsa.de
Studies:
OmniNet
n = 500/1,000, Frequency: 120/yr.
OmniTel
n = 500/1,000, Frequency: 215/yr.
Internet Users
n = 500/1,000, Frequency: 100/yr.

Forum Research, Inc.
180 Bloor St. W., Suite 1401
Toronto, ON M5S 2V6
Canada
Ph. 416-960-9600 ext. 9603
Fax 416-960-9602
E-mail: lbozinoff@forumresearch.com
www.forumresearch.com
Lorne Bozinoff, President
Studies:
National Consumer Omnibus
n = 1,000, Frequency: 52/yr.

Gaither International, Inc.
G.P.O. Box 70211
San Juan, PR 00936
Puerto Rico
Ph. 787-728-5757
Fax 787-728-5715
E-mail: gaither@gaitherinternational.com
www.gaitherinternational.com
David Whitehouse, V.P. of Custom Rsch.
Studies:
Purchasing Agent Omnibus
n = 1,000, Frequency: 4/yr.
Representative Adult Omnibus
n = 1,000, Frequency: 4/yr.

Geocartography Knowledge Group
5 Druyanov Street
Klal Tower
Tel Aviv
Israel
Ph. 972-3-528-3773
Fax 972-3-528-3771
E-mail: research@geocartography.com
Studies:
Israel, National Adult Omnibus
n = 500, Frequency: 100/yr.
Israel, Russian Omnibus
n = 500, Frequency: 40/yr.
Israel, Arabs
n = 500, Frequency: 40/yr.

GfK Croatia
Draskoviceva 54
10 000 Zagreb
Croatia
Ph. 385-1-492-1222
Fax 385-1-492-1223
E-mail: gfk@gfk.hr
www.gfk.hr
Studies:
GfK Croatia
n = 1,000, Frequency: 10/yr.

GfK Marktforschung GmbH
Gfk Group
Nordwestring 101
90319 Nurnberg
Germany
Ph. 49-911-395-2323
Fax 49-911-338486
E-mail: bus@gfk.de
www.gfk.de
Klaus Hilbinger
Studies:
GFK Classic Bus (CAPI)
n = 2,000, Frequency: 52/yr.
GfK Phone Bus (CATI)
n = 1,000, Frequency: 365/yr.
GfK Weekend Bus (CATI)
n = 500, Frequency: 52/yr.
GfK Children's Bus (CAPI)
n = 500, Frequency: 53/yr.
GfK Euro Bus (CAPI/PAPI)
n = 2,000
GfK Euro Phone (CATI)
n = 1,000
Gfk Globo Bus (CAPI/PAPI)
n = 2,000
GfK Globo Phone (CATI)
n = 1,000

Global Market Research
Ludgate House
245 Black Friars Rd.
London SE1 9UL
United Kingdom
Ph. 44-20-7890-9363
Fax 44-20-7890-9352
E-mail: b.baker@nopworld.com
www.agmr.com
Studies:
Sweden Telephone Index
n = 1,000, Frequency: 52/yr.
Sweden Face-to-Face Index
n = 500, Frequency: 26/yr.
Quantum Omnibus Belgium
n = 1,000, Frequency: 52/yr.
Scanner Omnibus Belgium
n = 500, Frequency: 52/yr.
Young Generation UK
n = 1,000, Frequency: 12/yr.
Random Location UK
n = 2,000, Frequency: 42/yr.
Telebus UK
n = 1,000, Frequency: 100/yr.
CATIBus Studies Greece
n = 2,000, Frequency: 12/yr.

Greenfield Online
21 River Rd., 2nd fl.
Wilton, CT 06897
Ph. 203-834-8585
Fax 203-834-8686
E-mail: info@greenfield.com
www.greenfield.com
Keith Price, Vice President
Studies:
Greenfield Online Omnibus Study
n = 1,000, Frequency: 48/yr.

Harris Interactive℠
135 Corporate Woods
Rochester, NY 14623
Ph. 877-919-4765
E-mail: info@harrisinteractive.com
www.harrisinteractive.com
Studies:
Harris Interactive QuickQuery℠
n = 2,000+, Frequency: 100+/yr.

QuickQuery℠, a service of Harris Interactive, the global online market research leader, lets you ask questions and get accurate, projectable answers from 2,000 people nationwide in two business days. Expert consulting, scrupulous attention to detail and comprehensive online research experience add to Harris Interactive's assurance that your most ambitious omnibus needs will be met accurately, reliably and on time.
(See advertisement Insert)

Hendal Research
Meduliceva 13/1
10 000 Zagreb
Croatia
Ph. 385-1-484-8640
Fax 385-1-484-7033
E-mail: info@hendal.hr
www.hendal.hr
Morana Kristek, Psychologist
Studies:
HR Omnibus
n = 1,000, Frequency: 7/yr.

I.E.S. Information Europe Services
14 rue d'Uzes
75002 Paris
France
Ph. 33-1-40-13-16-16
Fax 33-1-40-13-16-19
E-mail: info@ieseurope.com
www.ieseurope.com
Jean Lopez
Studies:
I.E.S. Omnibus Consumers
n = 1,000, Frequency: 52/yr.
I.E.S. Omnibus GP's Physicians
n = 500, Frequency: 10/yr.
I.E.S. Omnibus Veterinarians
n = 250, Frequency: 5/yr.
I.E.S. Omnibus Specialists
n = 250, Frequency: 2/yr.

ICR/International Communications Research
53 W. Baltimore Pike
Media, PA 19063-5698
Ph. 484-840-4300
Fax 484-840-4599
E-mail: icr@icrsurvey.com
www.icrsurvey.com
Steven C. McFadden, President
Studies:
EXCEL
n = 1,000, Frequency: 104/yr.
TeenEXCEL
n = 500, Frequency: 12/yr.
SmallBizEXCEL
n = 500, Frequency: 12/yr.

EXCEL - National telephone omnibus survey of 1,000 consumers conducted twice each week. Interviewing through final tabulations in seven days. RDD sampling; CATI interviewing; custom options; extremely cost-effective. TeenEXCEL - Monthly national telephone omnibus survey of 500 teens aged 12 to 17. SmallBizEXCEL - Monthly national telephone omnibus survey fo 500 businesses with less than 100 employees.
(See advertisement on p. 105)

Insight Research & Consulting Corp.
604 1st St. S.W., Suite 400
Calgary, AB T2P 1M7
Canada
Ph. 403-265-8700 or 888-265-8700
Fax 403-265-8701
E-mail: tremblay@ircc.com
www.ircc.com
Marc Tremblay, Managing Director
Studies:
Calgary Metropolitan Area Omnibus
n = 500, Frequency: 4/yr.
Edmonton Metropolitan Area Omnibus
n = 500, Frequency: 4/yr.
Alberta Omnibus
n = 800, Frequency: 3/yr.
Canada Omnibus
n = 1,500, Frequency: 2/yr.

INTAGE Inc.
Global Services
1-4-1, Honcho,
Higashikurume-shi
Tokyo 203-8601
Japan
Ph. 81-4-2476-5164
Fax 81-4-2476-5178
E-mail: global-service@intage.co.jp
www.intage.co.jp
Studies:
INTAGEbus
n = 1,500, Frequency: 12/yr.
INTAGEbus for Males
n = 1,000, Frequency: 4/yr.
INTAGEbus Nationwide
n = 15,000, Frequency: 2/yr.
INTAGEbus Household Omnibus Survey
n = 6,340, Frequency: 1/yr.

Inter@ctive Market Research srl
Via Scarlatti 150
Naples 80127
Italy
Ph. 39-81-2292473
Fax 39-81-2292463
E-mail: m.pucci@imrgroup.com
www.imrgroup.com
Maurizio Pucci
Studies:
Internet Usage/General
n = 2,000, Frequency: 2/yr.
Internet Banking
n = 2,000, Frequency: 1/yr.
News Online
Frequency: 2/yr.
Travel/Holidays Omnibus
Frequency: 2/yr.

IPSOS - Reid Corporation
100 S. 5th St., Suite 2200
Minneapolis, MN 55402
Ph. 612-904-6970
Fax 612-904-6980
E-mail: brian.cruikshank@ipsos-reid.com
www.angusreid.com
Brian Cruikshank, Sr. V.P./Managing Director
Studies:
IPSOS-Reid US Express
n = 1,000, Frequency: 48/yr.
Canadian National IPSOS-Reid Poll
n = 1,000, Frequency: 48/yr.
IPSOS-Reid Global Express
Frequency: 4/yr.

Ipsos-Demoskop
Pulawska 39/4
02 508 Warsaw
Poland
Ph. 48-22-848-35-14 or 48-22-848-35-57
Fax 48-22-848-35-97
E-mail: mail@ipsos-demoskop.com
www.ipsos-demoskop.com
Studies:
TargetBus
n = 1,300, Frequency: 12/yr.

Ipsos-NPD
100 Charles Lindbergh Blvd.
Uniondale, NY 11553
Ph. 516-507-3000
Fax 516-507-3300
E-mail: allyson_leavy@ipsos-npd.com
www.ipsos-npd.com
Studies:
Ipsos InstaVue
n = 5,000, Frequency: 12/yr.

Issues and Answers Network, Inc.
5151 Bonney Rd., Suite 100
Virginia Beach, VA 23462
Ph. 757-456-1100 or 800-23-ISSUE
Fax 757-456-0377
E-mail: peterm@issans.com
www.issans.com
Pamela J. Jenkins
Studies:
Fifty Plus Omnibus
Issues of America - Newspaper Issues Omnibus

2002 OMNIBUS DIRECTORY

Carrick James Market Research
6 Homer St.
London W1H 4NT
United Kingdom
Ph. 44-20-7724-3836
Fax 44-20-7224-8257
E-mail: research@cjmr.co.uk
www.cjmr.co.uk
Studies:
CJMR Omnibus
n = 800, Frequency: 16/yr.

Kadence Business Research
85 Speen St.
Framingham, MA 01701
Ph. 508-620-1222
Fax 508-620-1223
E-mail: ojenkins@us.kadence.com
www.kadence.com
Owen Jenkins
Studies:
Electronic Pre Press
Frequency: 2/yr.
Business Car Fleets
Frequency: 1/yr.
Truck Fleets
Frequency: 1/yr.
Independent Pharmacists
Frequency: 1/yr.
Facilities Managers
Frequency: 1/yr.
Nursing Home Directors
Frequency: 1/yr.
Electrical Engineers
Frequency: 1/yr.
Business Travel Managers
Frequency: 2/yr.

KidzEyes.com
See the world through KidzEyes!

KidzEyes.com
(a subsidiary of C&R Research)
500 N. Michigan Ave.
Chicago, IL 60611
Ph. 312-828-9200
Fax 312-527-3113
E-mail: info@crresearch.com
www.crresearch.com
Studies:
KidzEyes
n = 900, Frequency: 12/yr.

KidzEyes is a national online panel of kids 6-14. Whether you want to conduct a custom, full-scale study or ask only a few questions in our monthly omnibus, KidzEyes will get you the answers you need. The omnibus fields once a month among 900 kids and provides clients with online real-time access to survey results, downloadable data files, and electronic crosstabulations.
(See advertisement on p. 3)

Leflein Associates, Inc.
One Bridge Plaza
Fort Lee, NJ 07024
Ph. 201-363-1661
Fax 201-363-1663
E-mail: jhawkens@Leflein.com
www.leflein.com
Jessica Hawkens
Studies:
National Survey Institute (NSI) Poll
n = 1,000, Frequency: 52/yr.

Market Facts of Canada
77 Bloor St. W.
Toronto, ON M5S 3A4
Canada
Ph. 416-964-6262
Fax 416-964-5882
E-mail: kwojewoda@marketfacts.com
www.marketfacts.com
Candace Cohen
Studies:
National Flexibus
n = 10,000, Frequency: 4/yr.
National Superbus
n = 50,000, Frequency: 4/yr.
TeleNation - Canada
n = 1,000, Frequency: 24/yr.
TeleNation - Quebec
n = 500, Frequency: 24/yr.
eNation
n = 1,000, Frequency: 26/yr.

Market Facts, Inc.
3040 W. Salt Creek Ln.
Arlington Heights, IL 60005
Ph. 847-590-7000
Fax 847-590-7114
E-mail: kwojewoda@marketfacts.com
www.marketfacts.com
Norm Kane, President
Studies:
TeleNation
n = 1,000, Frequency: 156/yr.
TeleNation Overnight
TeleNation Tracker
TeleNation - Canada
TeleNacion
TeleNations Global

MARKET TEST® Ltd.
6 Septemvri St. No. 4, 2nd floor
1000 Sofia
Bulgaria
Ph. 359-2-981-5327
Fax 359-2-981-7756
E-mail: office@mtest.bol.bg
www.mtest.bol.bg
Studies:
Bulgaria F2F
n = 1,200, Frequency: 2/yr.
Sofia F2F
n = 1,400, Frequency: 9/yr.

Market Trends, Inc.
(Corporate Headquarters)
375 Corporate Dr. S., Suite 100
Seattle, WA 98188
Ph. 206-575-1222
Fax 206-575-8779
E-mail: devon@markettrends.com
www.markettrends.com
Devon Hensleigh, Project Manager
Studies:
Opinion Monitor
n = 400, Frequency: 4/yr.

Marketing Evaluations/TVQ, Inc.
1615 Northern Blvd.
Manhasset, NY 11030
Ph. 516-365-7979
Fax 516-365-9351
E-mail: info@qscores.com
www.qscores.com
Studies:
Performer Q Ratings
n = 1,800, Frequency: 2/yr.
TVQ Program Ratings
n = 1,800, Frequency: 8/yr.
Cartoon Q Ratings
n = 3,600, Frequency: 2/yr.
Cable Q Ratings
n = 3,800, Frequency: 4/yr.
Sports Q Ratings
n = 2,000, Frequency: 1/yr.
Product Q Brand Equity Ratings
n = 1,800, Frequency: 2/yr.
Kids Product Q Brand Equity Ratings
n = 2,000, Frequency: 2/yr.
Performer of the Past Q Ratings
n = 1,500, Frequency: 1/yr.

Marketing Resource Group, Inc.
225 S. Washington Square
Lansing, MI 48933
Ph. 517-372-4400
Fax 517-372-4045
E-mail: paulk@mrgmi.com
www.mgrmi.com
Paul King, Dir. of Survey Rsch.
Studies:
MRG Michigan Poll
n = 600, Frequency: 2/yr.

Marplan
Marktplatz 9
63065 Offenbach/Main
Germany
Ph. 49-69-8059-0
Fax 49-69-8059-243
E-mail: info@marplan.de
www.marplan.de
Birgit Samsen
Studies:
MCS
n = 2,500, Frequency: 24/yr.
MARPLAN CATI
n = 1,000, Frequency: 50/yr.

Mature
Marketing & Research

Mature Marketing and Research
The Boomer Report
85 E. India Row, Suite 30A
Boston, MA 02110
Ph. 617-720-4158
Fax 617-723-1254
E-mail: mmrharris@aol.com
www.maturemarketing.com
Dr. Leslie M. Harris, Managing Partner
Studies:
The Boomer Report
n = 1,000, Frequency: 3/yr.

The Boomer Report is published three times yearly: in January, June and November. The annual cost is $150.00. Categories include: travel and leisure (airlines, hotels, cruise lines); financial services (banking, brokerage and insurance); health and personal care; fast-food restaurants. Additional services include multiple client studies. Low cost omnibus studies. Tabulation, analysis and reporting are available. Please see Web site for additional information. For sample report e-mail MMRHarris@aol.com. Please include name of company, position and mailing address.
(See advertisement on p. 107)

MERCURY Research
95, Siret Street, 1st floor, District 1
Bucharest 783082
Romania
Ph. 401-224-6600
Fax 401-224-6611
E-mail: contact@mercury.ro
www.mercury.ro
Studies:
Mercury Omnibus
n = 1,200, Frequency: 12/yr.

NFO AISA Slovakia Ltd.
Drotarska cesta 46
817 18 Bratislava
Slovakia
Ph. 421-7-62-80-20-41
Fax 421-7-62-80-21-70
E-mail: aisa@aisa.sk
www.aisa.sk
Jan Hudak
Studies:
NFO AISA
n = 750, Frequency: 26/yr.

NFO CFgroup
An NFO WorldGroup Company
1075 Bay St.
Toronto, ON M5S 2X5
Canada
Ph. 416-924-5751
Fax 416-923-7085
E-mail: lmanzer@cfgroup.ca
www.nfocfgroup.com
Laura Manzer
Studies:
Monitor
n = 2,000, Frequency: 12/yr.
Multifacts
n = 1,000, Frequency: 52/yr.
Multi-Q
n = 22,000, Frequency: 4/yr.
NFO Fast Feedback
n = 1,000, Frequency: 52/yr.

NFO WorldGroup
NFO 2 Pickwick Plaza
Greenwich, CT 06830
Ph. 203-629-8888
Fax 203-629-8885
www.NFOW.com
Studies:
Multicard

NIPO, The Market Research Institute
P.O. Box 247
Grote Bickersstraat 74
1000 AE Amsterdam
The Netherlands
Ph. 31-20-522-54-44
Fax 31-20-522-53-33
E-mail: info@nipo.nl
www.nipo.nl
Henk Hoogeveen, Director of Operations
Studies:
Consumer Monitor CATI - Dutch Households
n = 500, Frequency: 52/yr.
Business Monitor - Dutch Establishments
n = 250, Frequency: 52/yr.
Homebus - 1,000 Dutch Households/Individuals
n = 1,000, Frequency: 52/yr.

Nippon Research Center, Ltd.
Shuwa-Sakurabashi Bldg., 4-5-4 Hatchobori, Chou-ku
Tokyo 104-0032
Japan
Ph. 81-3-3206-8351
Fax 81-3-3555-9895
E-mail: iijima@nrc.co.jp
www.nrc.co.jp
Hideo Nakamura, Deputy Manager
Studies:
NRC Omnibus
n = 1,250, Frequency: 12/yr.
NRC Automobile Omnibus
n = 2,000, Frequency: 2/yr.

NOEMA Ltd. Social and Marketing Research
16 Jagoda Str.
100 Sofia
Bulgaria
Ph. 359-2-962-1226 or 359-2-962-1227
Fax 359-2-962-0303
E-mail: noema@noema.bg
www.noema.bg
Margarita Boeva, Managing Director
Studies:
Noema's Omnibus
n = 1,050, Frequency: 6/yr.

NOP Automotive
Ludgate House
245 Blackfriars Rd.
London SE1 9UL
United Kingdom
Ph. 44-20-7890-9090
Fax 44-20-7890-9263
E-mail: londonauto@nopworld.com
www.nopworld.com
Nicole Eaglestone
Studies:
CATI MotorBus
n = 500, Frequency: 52/yr.
CAPI MotorBus
n = 1,000, Frequency: 52/yr.

NOP Family
Ludgate House
245 Blackfriars Road
London SE1 9UL
United Kingdom
Ph. 44-20-7890-9890
Fax 44-20-7890-9361
E-mail: all.family@nop.co.uk
www.nop.co.uk/family
Studies:
Telephone Omnibus
n = 500, Frequency: 6/yr.

NOP Healthcare
Ludgate House
245 Blackfriars Road
London SEI 9UL
United Kingdom
Ph. 44-20-7890-9080
Fax 44-20-7890-9159
E-mail: nop.heath@nop.co.uk
www.nop.co.uk/nop/healthcare.htm
Studies:
(GP ROS) Face-to-face
n = 200, Frequency: 10/yr.
(GP Net) Internet
n = 200, Frequency: 24/yr.
(QUEST) F-T-F and Tel
n = 150, Frequency: 120/yr.

NOP World
NOP Telephone Interviewing Services (TIS)
Ludgate House, 5th floor
245 Blackfriars Road
London SE1 9UL
United Kingdom
Ph. 44-20-7890-9000
Fax 44-20-7890-9509
E-mail: omnibus@nopworld.com
www.nopworld.com
Carol Bernasconi, Omnibus Director
Studies:
Random dialing/Quota Omnibus
n = 1,000, Frequency: 104/yr.
Random Location Omnibus
n = 2,000, Frequency: 36/yr.
Quota Omnibus
n = 1,000, Frequency: 12/yr.
e-Omnibus
n = 1,000, Frequency: 24/yr.

Opinion Search, Inc.
1800 - 160 Elgin St.
Ottawa, ON K2P 2C4
Canada
Ph. 800-363-4229 or 613-230-9109
Fax 613-230-3793
E-mail: info@opinionsearch.com
www.opinionsearch.com
Janette Niwa, V.P. Client Services
Studies:
Express
n = 2,000/1,000, Frequency: 12/yr.

Opinion Search, Inc. is Canada's largest independent data collection company, providing telephone, site, mail and online interviewing and tabulation services. Our CATI and Web-based interviewing systems are fully integrated, allowing simultaneous surveying via call centers (250 stations across Ottawa, Toronto and Montreal) and in-house CAWI hosting.
(See advertisement on Back Cover)

Pan Arab Research Center - UAB
P.O. Box 14680
Dubai
United Arab Emirates
Ph. 971-4-337-6696
Fax 971-4-334-4456
E-mail: parcmain@emirates.net.ae
www.arabresearch.com
Studies:
PARC F2F Omnibus
n = 600, Frequency: 4/yr.
PARC Telebus
n = 600, Frequency: 12/yr.

PORI - Public Opinion & Mktg. Rsch. of Israel
P.O. Box 20114
Tel Aviv 61200
Israel
Ph. 972-3-561-2443
Fax 972-3-561-0960
E-mail: pori@attglobal.net
Itzik Rozenblum
Studies:
Face-to-Face Nationwide
n = 1,000, Frequency: 8/yr.
Face-to-Face Arab Population
n = 600, Frequency: 2/yr.
Face-to-Face Russian Population
n = 800, Frequency: 2/yr.
Telephone General Population
n = 500, Frequency: 48/yr.
Telephone Arab Population
n = 400, Frequency: 24/yr.
Telephone Russian Population
n = 400, Frequency: 24/yr.

Prisma Options Ltd.
25 Alexandroupoleos, Ambelokipi
115 27 Athens
Greece
Ph. 30-1-748-2001
Fax 30-1-775-6227
E-mail: prismaop@hol.gr
Marita Sormunen
Studies:
Prisma Face-to-Face Omnibus
n = 1,000, Frequency: 4/yr.
Prisma Telephone Omnibus
n = 1,000, Frequency: 3/yr.

ProCon GfK Business Information Services
Sehit Ahmet Sokak No:30
80310 Istanbul
Turkey
Ph. 91-212-216-2191
Fax 91-212-216-2199
E-mail: deniz.ozerdil@procongfk.com
www.procongfk.com
Studies:
Urban Omnibus
n = 1,000, Frequency: 3/yr.

Promodata - Leemis Services
1 S. 270 Summit
Oakbrook Terrace, IL 60181
Ph. 630-889-1900
Fax 630-889-0972
E-mail: promodata@leemis.com
www.promodata.com
Rich Palesh, President
Studies:
Price-Trak
Coupon-Trak
Ad Activity
Retailer Ad Digest - Drug/Mass Merchandise
Retailer Ad Digest - Food
Target Trak
Volume Trak
Custom Trak
PTR Services

Research RBM
Slagthuset
211 20 Malmo
Sweden
Ph. 46-40-98-01-70
Fax 46-40-98-17-70
E-mail: goran.lilja@rbmab.se
www.rbmab.se
Goran Lilja, President
Studies:
The Telephone Bus

RJC Marketing Research Inc.
7F Dai-ni Ryumeikan Bldg.
3-20, KandaOgawamachi, Chiyoda-ku
Tokyo 101-0052
Japan
Ph. 81-3-5217-3926
Fax 81-3-3293-5737
E-mail: seki@rjc.co.jp
www.rjc.co.jp
Studies:
Tokyo Metro Bus
n = 1,000, Frequency: 2/yr.
Telephone Omnibus Japan
n = 1,000, Frequency: 2/yr.

Robinson Research, Inc.
524 W. Indiana
Spokane, WA 99205
Ph. 509-325-8080
Fax 509-325-8068
E-mail: info@robinsonresearchinc.com
www.robinsonresearchinc.com
Studies:
Spokane County Residential Omnibus
n = 400, Frequency: 6/yr.
Koolenai County Residential Omnibus
n = 400, Frequency: 4/yr.

RoperASW

RoperASW Fast Answers
1060 State Rd.
Princeton, NJ 08540
Ph. 609-921-3333
E-mail: jtimony@roperasw.com
www.roperasw.com
Jim Timony, Sr. Vice Pesident
Studies:
OmniTel™
n = 1,000, Frequency: 52/yr.

America's most popular telephone omnibus. Each weekly omnibus study is conducted with a freshly drawn sample of 1,000 adults, 18 years of age and older. Accommodates many types of client studies including point-in-time, tracking, concept testing, advertising impact.
(See advertisement on p. 109)

RTNielson Company
8 E. Broadway, Suite 312
Salt Lake City, UT 84111
Ph. 801-359-1345 or 800-786-9946
Fax 801-355-6335
E-mail: info@rtnielson.com
www.rtnielson.com
Studies:
RTNielson Asks America
n = 1,000, Frequency: 12/yr.

SOCIS
Taylor Nelson Sofres Ukrain
P.O. Box 117
01001 Kiev 1
Ukraine
Ph. 380-44-228-6432 or 380-44-220-6883
Fax 380-44-228-2297
E-mail: socis@socis.kiev.ua
www.socis.kiev.ua
Studies:
Politiocal Institution Omnibus
n = 1,200, Frequency: 11/yr.

Southeastern Institute of Research (SIR)
2325 W. Broad St.
Richmond, VA 23220
Ph. 800-807-8981
Fax 804-358-7851
E-mail: lla@SIRresearch.com
www.SIRresearch.com
G. William Greer, Dir. Client Services
Studies:
Baltimore Insight
n = 300, Frequency: 12/yr.
Washington Insight
n = 300, Frequency: 12/yr.
Richmond Insight
n = 300, Frequency: 12/yr.
Hampton/Norfolk/Virginia Beach Insight
n = 300, Frequency: 12/yr.

Strategic Marketing Services
A Div. of Pan Atlantic Consultants, Inc.
5 Milk St.
Portland, ME 04101
Ph. 207-774-6738 or 207-871-8622
Fax 207-772-4842
E-mail: kmorse@maine.rr.com
www.panatlantic.net
Patrick O. Murphy, President
Studies:
SMS Omnibus Poll™
n = 400, Frequency: 4/yr.

Strategy Research Corporation
100 N.W. 37th Ave., 3rd fl.
Miami, FL 33125
Ph. 305-649-5400
Fax 305-643-5584
E-mail: jforrest@marketfacts.com
www.strategyresearch.com
Deborah Gonderil
Studies:
SRC Hispanic Omnibus TeleNacion (Top 10 Mkts.)
n = 3,000, Frequency: 12/yr.
Telenacinnal Omnibus (national) of Hispanics
n = 500, Frequency: 12/yr.
Teleamericas (Latin American Countries)
n = 500/1,000, Frequency: 12/yr.

Strateji/MORI Research and Planning Ltd.
Buyukdere Cad. No: 191
Levent
Levent Istanbul
Turkey
Ph. 90-212-270-6968
Fax 90-212-284-6712
E-mail: stratejimori@stratejimori.com.tr
www.stratejimori.com.tr
Studies:
FasTTrack
n = 1,300, Frequency: 12/yr.

TAYLOR NELSON SOFRES INTERSEARCH

Taylor Nelson Sofres Intersearch Express Omnibus
410 Horsham Rd.
Horsham, PA 19044-0189
Ph. 215-442-9000
Fax 215-442-9040
E-mail: info@intersearch.tnsofres.com
www.intersearch.tnsofres.com
Contacts Telephone Omnibus:
Joel Henkin, Ph. 800-EXP-POLL,
joel.henkin@intersearch.tnsofres.com
Jane Cutler, Ph. 215-773-4065,
jane.cutler@intersearch.tnsofres.com
Contacts Internet Omnibus:
Joel Henkin, Ph. 800-EXP-POLL,
joel.henkin@intersearch.tnsofres.com
Jennifer DiLillo, Ph. 203-846-5748,
Jennifer.dilillo@intersearch.tnsofres.com
Studies:
EXPRESS Telephone Omnibus
n = 1,000, Frequency: 52/yr.
TEEN EXPRESS
n = 250 or 500, Frequency: oncall
EXPRESS Internet Omnibus
n = 1,000, Frequency: 52/yr.
Ncompass International Omnibus

Express Telephone Omnibus - National probability sample of 1,000 adults conducted weekly by telephone. Guaranteed delivery of data via e-mail by 3 p.m. Monday or it is free (closed-end questions). Samples of men and/or women and regional samples also available. Conducted 52 times per year. TEEN EXPRESS - National sample of 250 or 500 children (male and/or female). Conducted as needed. EXPRESS Internet Omnibus - National sample of 1,000 adult Internet users conducted weekly. Enable the exposure of visuals while respondent answers questions. Conducted 52+ times per year. Ncompass International Omnibus - Enables you to obtain omnibus research from the network of over 50 Taylor Nelson Sofres omnibus surveys around the globe. Participate where needed.
(See advertisement on p. 110)

Team Vier b.v.
Veenplaats 19
1182 JW Amstelveen
The Netherlands
Ph. 31-20-645-53-55
Fax 31-20-645-59-30
E-mail: team4u@team4u.nl
www.team4u.nl
Studies:
Team Vier Omnibus
n = 1,000, Frequency: 12/yr.

Teenage Research Unlimited
707 Skokie Blvd., 7th fl.
Northbrook, IL 60062
Ph. 847-564-3440
Fax 847-564-0834
E-mail: info@teenresearch.com
www.teenresearch.com
Michael Wood, Vice President
Studies:
TRU Study
n = 1,000, Frequency: 2/yr.
Omnibuzz
n = 850, Frequency: 12/yr.

THOMPSON LIGHTSTONE & COMPANY
A MARITZ MARKETING RESEARCH COMPANY

Thompson Lightstone & Company
350 Bloor St. E., Suite 600
Toronto, ON M4W 1H4
Canada
Ph. 416-922-1140 or 877-966-8796
Fax 416-922-8014
E-mail: omnitel@tlcl.com
www.omnitel.org
Cliff Swaters
Liz Futo
John Otoo
Studies:
OMNITEL
n = 2,000, Frequency: 24/yr.

Omnitel is Canada's most versatile and cost-effective omnibus research service going. See for yourself what makes Omnitel number one: 4,000 adult interviews per month, ultimate sample flexibility, low per-question costs, frequent service, fast turnaround, optional kids and teens module, premier customer service, reserve space online.
(See advertisement on p. 111)

Ulteco Research Kft.
Dorottya u. 3
1051 Budapest
Hungary
Ph. 36-1-318-7825
Fax 36-1-266-4669
www.ultexmr.com
Studies:
MotoBu
n = 1,000

The Wagner Group, Inc.
254 W. 31st St.
New York, NY 10001
Ph. 212-695-0066
Fax 212-564-1246
E-mail: wagnergrp@aol.com
www.wagnergrp.com
Jeffrey Wagner, President
Studies:
College Scan
n = 3,000

WestGroup Research
2720 E. Thomas, Bldg. A
Phoenix, AZ 85016
Ph. 602-707-0050 or 800-999-1200
Fax 602-707-0055
E-mail: bethsmith@westgroupresearch.com
www.westgroupresearch.com
Ted Apostol, President
Studies:
WestTrack
n = 560, Frequency: 12/yr.

Wilke Markedsanalyse A/S
Vindegade 53
5000 Odense
Denmark
Ph. 45-70-10-20-80
Fax 45-70-10-20-81
E-mail: wilke@wilke.dk
www.wilke.dk
Jakob Fiellau-Nikolajsen
Studies:
CATI Consumer - Denmark
n = 1,000, Frequency: 50/yr.
CATI Consumer - Sweden
n = 500, Frequency: 25/yr.
CATI Consumer - Norway
n = 500, Frequency: 25/yr.

Wirthlin Worldwide
1920 Association Dr., Suite 500
Reston, VA 20191
Ph. 703-556-0001 or 888-217-4368
Fax 703-893-3811
E-mail: inquires@wirthlin.com
www.wirthlin.com
James Multari
Studies:
National Quorum
n = 1,000, Frequency: 26/yr.
Executive Omnibus
n = 150, Frequency: 4/yr.
Congressional Omnibus
n = 150, Frequency: 3/yr.

Yontem Research & Consultancy Ltd.
5 Gazeteciler Sitesi A -10/3
80620 Istanbul
Turkey
Ph. 90-212-278-1219
Fax 90-212-269-8707
E-mail: info@yontemresearch.com
www.yontemresearch.com
Sinem Mete
Studies:
Yontem Standard Omnibus
n = 1,200, Frequency: 12/yr.
Pharmbus
n = 600, Frequency: 1/yr.

Zogby International
1750 Genesee St.
Utica, NY 13502
Ph. 315-624-0200
Fax 315-624-0210
E-mail: marketing@zogby.com
www.zogby.com
Donielle Bradley
Studies:
Zogby America
n = 1,200
Zogby New York
n = 900
Zogby
n = 600
Latino Minds

Cross-Index Section

Advertising
ACNielsen Australia
AMI Hong Kong
ARC Research Corporation
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
forsa GmbH
Harris Interactive℠
Hendal Research
KidzEyes.com
Market Facts, Inc.
MARKET TEST® Ltd.
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
Promodata - Leemis Services
RJC Marketing Research Inc.
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

African-Americans
CARAVAN®
Marketing Resource Group, Inc.
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Agricultural
ACNielsen Australia
CARAVAN®
Central Research Services, Inc. (CRS)
forsa GmbH
Harris Interactive℠
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Airlines
ACNielsen Australia
AMI Hong Kong
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
forsa GmbH
Harris Interactive℠
INTAGE Inc.
Market Facts, Inc.
Market Trends, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Appliances
ACNielsen Australia
AMI Hong Kong
Baltic Data House
CARAVAN®
Equifax Direct Marketing Solutions, Inc.
forsa GmbH
Harris Interactive℠
Hendal Research
INTAGE Inc.
Market Trends, Inc.
NFO CFgroup
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Asian-Americans
CARAVAN®
Opinion Search, Inc.
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Automotive
ACNielsen Australia

Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
forsa GmbH
Global Market Research
Harris Interactive℠
Hendal Research
INTAGE Inc.
Market Facts, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
Nippon Research Center, Ltd.
NOP Automotive
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Business-To-Business

ACNielsen Australia
Baltic Data House
BRC Field & Focus Services
Equifax Direct Marketing Solutions, Inc.
NIPO, The Market Research Institute
RoperASW Fast Answers

Cable

ACNielsen Australia
CARAVAN®
CENTRIS℠
Decima Research, Inc.
forsa GmbH
Harris Interactive℠
ICR/International Communications Research
Market Facts, Inc.
Market Trends, Inc.
Marketing Evaluations/TVQ, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
Opinion Search, Inc.
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Carpeting

CARAVAN®
forsa GmbH
Harris Interactive℠
Market Trends, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Chemical Industry

CARAVAN®
forsa GmbH
Hendal Research
Market Trends, Inc.
Marketing Resource Group, Inc.
NFO CFgroup
NIPO, The Market Research Institute
RoperASW Fast Answers

Children

American Opinion Research
AMI Hong Kong
BMRB International ltd
CARAVAN®
Digital Research, Inc.
forsa GmbH
GfK Marktforschung GmbH
Global Market Research
Carrick James Market Research
KidzEyes.com
Marketing Evaluations/TVQ, Inc.
MERCURY Research
NIPO, The Market Research Institute
NOP World
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
Thompson Lightstone & Company

College Students

forsa GmbH
Hendal Research
Marketing Resource Group, Inc.
MERCURY Research
NIPO, The Market Research Institute
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch
The Wagner Group, Inc.

Computers

ACNielsen Australia
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
CENTRIS℠
Decima Research, Inc.
forsa GmbH
Harris Interactive℠
IPSOS - Reid Corporation
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
Promodata - Leemis Services
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Consumer-Canada

Ad Hoc Research
Decima Research, Inc.
Forum Research, Inc.
Insight Research & Consulting Corp.
Market Facts of Canada
Market Facts, Inc.
NFO CFgroup
Opinion Search, Inc.
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch
Thompson Lightstone & Company

Consumer-Europe

Amarach Consulting
BMRB International ltd
Business and Marketing Analytic Center
forsa GmbH
GfK Croatia
GfK Marktforschung GmbH
I.E.S. Information Europe Services
Ipsos-Demoskop
Market Facts, Inc.
Marplan
NFO AISA Slovakia Ltd.
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
NOP World
Prisma Options Ltd.
Research RBM
RoperASW Fast Answers
SOCIS
Taylor Nelson Sofres Intersearch
Team Vier b.v.
Ulteco Research Kft.
Wilke Markedsanalyse A/S

Consumer-Local

ACNielsen Australia (Australia)
Ad Hoc Research (PQ)
AMI Hong Kong (Hong Kong)
Baltic Data House (Latvia)
Brandman Marketing Rsch. & Cnsltg. (Israel)
BRC Field & Focus Services (AZ)
Central Research Services, Inc. (CRS) (Japan)
CID/Gallup, S.A. (Costa Rica)
Datum Internacional SA (Peru)
Geocartography Knowledge Group (Israel)
GfK Marktforschung GmbH (Germany)
Global Market Research (U.K.)
Hendal Research (Croatia)
INTAGE Inc. (Japan)
Market Facts, Inc. (IL, PQ, ON)
Market Trends, Inc. (WA)
Marketing Resource Group, Inc. (MI)
MERCURY Research (Romania)
NIPO, The Market Research Institute (Netherlands)
Nippon Research Center, Ltd. (Japan)
PORI - Public Opinion & Mktg. Rsch. of Israel
ProCon GfK Business Info. Svcs. (Turkey)
RJC Marketing Research Inc.(Japan)
Robinson Research, Inc. (WA)
RoperASW Fast Answers (NJ)
Southeastern Inst. of Rsch. (SIR) (VA, MD, DC)
Strategic Marketing Services (ME)
Strateji/MORI Research and Planning Ltd. (Turkey)
Taylor Nelson Sofres Intersearch (PA)
WestGroup Research (AZ)
Yontem Research & Consultancy Ltd. (Turkey)

Consumer-U.S.

Irwin Broh & Associates
CARAVAN®
CENTRIS℠
Digital Research, Inc.
Direct Marketing Services Group, Inc.
Dittman Research Corp. of Alaska
Equifax Direct Marketing Solutions, Inc.
Harris Interactive℠
ICR/International Communications Research
IPSOS - Reid Corporation
Market Facts, Inc.
Marketing Evaluations/TVQ, Inc.
NFO WorldGroup
RoperASW Fast Answers
RTNielson Company
Taylor Nelson Sofres Intersearch
Wirthlin Worldwide

Zogby International

Couponing

Harris InteractiveSM
Market Trends, Inc.
Promodata - Leemis Services
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Credit Cards

ACNielsen Australia
AMI Hong Kong
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
forsa GmbH
Harris InteractiveSM
Hendal Research
INTAGE Inc.
Market Trends, Inc.
MERCURY Research
NFO CFgroup
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Dental

CARAVAN®
Harris InteractiveSM
Hendal Research
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Direct Mail

Harris InteractiveSM
Market Trends, Inc.
Marketing Resource Group, Inc.
NFO CFgroup
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Electronics

Amarach Consulting
AMI Hong Kong
Decima Research, Inc.
Equifax Direct Marketing Solutions, Inc.
forsa GmbH
Market Trends, Inc.
MERCURY Research
NFO CFgroup
Promodata - Leemis Services
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Energy-Petrochemical

AMI Hong Kong
CARAVAN®
Central Research Services, Inc. (CRS)
forsa GmbH
Harris InteractiveSM
Hendal Research
Issues and Answers Network, Inc.
Market Trends, Inc.
MERCURY Research
NFO CFgroup
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Entertainment

ACNielsen Australia
AMI Hong Kong
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
CENTRISSM
Decima Research, Inc.
Digital Research, Inc.
forsa GmbH
Harris InteractiveSM
KidzEyes.com
Market Facts, Inc.
Market Trends, Inc.
Marketing Evaluations/TVQ, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RJC Marketing Research Inc.
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Environmental

ACNielsen Australia
American Opinion Research
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
forsa GmbH
Harris InteractiveSM
Market Trends, Inc.
Marketing Resource Group, Inc.
NFO CFgroup
NIPO, The Market Research Institute
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch
Yontem Research & Consultancy Ltd.

Executives

Baltic Data House
CARAVAN®
Kadence Business Research
Marketing Resource Group, Inc.
NIPO, The Market Research Institute
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch
Wirthlin Worldwide

Eyecare/Eyewear

ACNielsen Australia
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
forsa GmbH
Harris InteractiveSM
INTAGE Inc.
Market Trends, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
Opinion Search, Inc.
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Financial Services

ACNielsen Australia
AMI Hong Kong
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
forsa GmbH
Harris InteractiveSM
Hendal Research
INTAGE Inc.
Inter@ctive Market Research srl
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
NOP Family
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
WestGroup Research

Food/Beverage

ACNielsen Australia
AMI Hong Kong
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
Digital Research, Inc.
forsa GmbH
Global Market Research
Harris InteractiveSM
Hendal Research
INTAGE Inc.
KidzEyes.com
Market Facts, Inc.
MARKET TEST® Ltd.
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RJC Marketing Research Inc.
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
Yontem Research & Consultancy Ltd.

Furniture

Equifax Direct Marketing Solutions, Inc.
forsa GmbH
Market Trends, Inc.

MERCURY Research
NFO CFgroup
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Gaming

ACNielsen Australia
CARAVAN®
Central Research Services, Inc. (CRS)
CENTRIS℠
Decima Research, Inc.
forsa GmbH
Harris Interactive℠
Market Trends, Inc.
Marketing Resource Group, Inc.
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
WestGroup Research

Health Care/Medical

AMI Hong Kong
ARC Research Corporation
Baltic Data House
Beta Research Corp.
Beta Research, Inc.
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
forsa GmbH
Global Market Research
Harris Interactive℠
Hendal Research
I.E.S. Information Europe Services
INTAGE Inc.
Kadence Business Research
Market Facts, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
NOP Healthcare
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategic Marketing Services
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
WestGroup Research

Hispanic

BRC Field & Focus Services
CARAVAN®
Direct Marketing Services Group, Inc.
Market Facts, Inc.
Marketing Resource Group, Inc.
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
Zogby International

Insurance

ACNielsen Australia
AMI Hong Kong
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
Harris Interactive℠
Hendal Research
Market Facts, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

International

ACNielsen Australia
AMI Hong Kong
Central Research Services, Inc. (CRS)
forsa GmbH
Market Facts, Inc.
NIPO, The Market Research Institute
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Internet/Online Users

ACNielsen Australia
AMI Hong Kong
Baltic Data House
BMRB International ltd
CARAVAN®
Central Research Services, Inc. (CRS)
CENTRIS℠
Decima Research, Inc.
Digital Marketing Services
forsa GmbH
Greenfield Online
Harris Interactive℠
Hendal Research
Inter@ctive Market Research srl
KidzEyes.com
Leflein Associates, Inc.
Market Facts of Canada
Market Facts, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOP World
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
Teenage Research Unlimited

Latin America

Market Facts, Inc.
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Lodging Industry

CARAVAN®
Harris Interactive℠
Market Trends, Inc.
Marketing Resource Group, Inc.
NFO CFgroup
NIPO, The Market Research Institute
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Management

Baltic Data House
CARAVAN®
Kadence Business Research
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Manufacturers

ACNielsen Australia
AMI Hong Kong
CARAVAN®
Equifax Direct Marketing Solutions, Inc.
Harris Interactive℠
Market Facts, Inc.
Market Trends, Inc.
MERCURY Research
NFO CFgroup
Promodata - Leemis Services
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Media

ACNielsen Australia
AMI Hong Kong
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
forsa GmbH
Harris Interactive℠
Issues and Answers Network, Inc.
Market Facts, Inc.
MARKET TEST® Ltd.
Market Trends, Inc.
Marketing Evaluations/TVQ, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategic Marketing Services
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
Yontem Research & Consultancy Ltd.

Mothers

AMI Hong Kong
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
Digital Research, Inc.
KidzEyes.com
Market Trends, Inc.
NIPO, The Market Research Institute
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

2002 OMNIBUS DIRECTORY

Office Products

ACNielsen Australia
AMI Hong Kong
Baltic Data House
CARAVAN®
Equifax Direct Marketing Solutions, Inc.
Harris Interactive℠
Market Trends, Inc.
NFO CFgroup
NIPO, The Market Research Institute
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Pet Foods

ACNielsen Australia
AMI Hong Kong
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Global Market Research
Harris Interactive℠
INTAGE Inc.
Market Facts, Inc.
Market Trends, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Pharmaceutical

AMI Hong Kong
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
Global Market Research
Harris Interactive℠
Hendal Research
I.E.S. Information Europe Services
INTAGE Inc.
Kadence Business Research
Market Facts, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
NOP Healthcare
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
Promodata - Leemis Services
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
Yontem Research & Consultancy Ltd.

Political Affairs

Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
Digital Research, Inc.
forsa GmbH
Geocartography Knowledge Group
Global Market Research
Harris Interactive℠
Hendal Research
Market Trends, Inc.
Marketing Resource Group, Inc.
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
SOCIS
Strategic Marketing Services
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
Wirthlin Worldwide
Yontem Research & Consultancy Ltd.

Promotions

ACNielsen Australia
CARAVAN®
Harris Interactive℠
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
PORI - Public Opinion & Mktg. Rsch. of Israel
Promodata - Leemis Services
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Public Policy Issues

Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
forsa GmbH
Harris Interactive℠
Hendal Research
Market Facts, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategic Marketing Services
Taylor Nelson Sofres Intersearch
Yontem Research & Consultancy Ltd.
Zogby International

Restaurants/Fast-Food

AMI Hong Kong
CARAVAN®
Harris Interactive℠
INTAGE Inc.
KidzEyes.com
Market Facts, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
PORI - Public Opinion & Mktg. Rsch. of Israel
Promodata - Leemis Services
RJC Marketing Research Inc.
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Retail

ACNielsen Australia
AMI Hong Kong
Baltic Data House
California Retail Survey
CARAVAN®
Central Research Services, Inc. (CRS)
Clickin Research
Equifax Direct Marketing Solutions, Inc.
Global Market Research
Harris Interactive℠
Hendal Research
Market Trends, Inc.
Marketing Resource Group, Inc.
NFO CFgroup
NIPO, The Market Research Institute
Promodata - Leemis Services
RoperASW Fast Answers
Strategic Marketing Services
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
WestGroup Research
Yontem Research & Consultancy Ltd.

Seniors/Mature/Elderly

CARAVAN®
Central Research Services, Inc. (CRS)
Digital Research, Inc.
Issues and Answers Network, Inc.
Marketing Resource Group, Inc.
Mature Marketing and Research
NIPO, The Market Research Institute
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Shopping Malls

AMI Hong Kong
Harris Interactive℠
NFO CFgroup
NIPO, The Market Research Institute
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Small/Home Business

ICR/International Communications Research
Kadence Business Research
NIPO, The Market Research Institute
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Sporting Goods

Equifax Direct Marketing Solutions, Inc.

Sports

ACNielsen Australia
AMI Hong Kong
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
forsa GmbH
Harris Interactive℠
Market Facts, Inc.
Market Trends, Inc.
Marketing Evaluations/TVQ, Inc.

Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RJC Marketing Research Inc.
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Steel Industry

Market Trends, Inc.
NFO CFgroup
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Technology

ACNielsen Australia
AMI Hong Kong
CARAVAN®
CENTRIS℠
Digital Research, Inc.
Harris Interactive℠
IPSOS - Reid Corporation
Market Trends, Inc.
Marketing Resource Group, Inc.
NFO CFgroup
NIPO, The Market Research Institute
Promodata - Leemis Services
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Teens

AMI Hong Kong
BMRB International ltd
CARAVAN®
forsa GmbH
ICR/International Communications Research
Carrick James Market Research
KidzEyes.com
Marketing Evaluations/TVQ, Inc.
MERCURY Research
NIPO, The Market Research Institute
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
Teenage Research Unlimited
Thompson Lightstone & Company

Telecommunications

ACNielsen Australia
AMI Hong Kong
ARC Research Corporation
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
CENTRIS℠
Decima Research, Inc.
forsa GmbH
Harris Interactive℠
Hendal Research
IPSOS - Reid Corporation
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Textiles

ACNielsen Australia
CARAVAN®
Harris Interactive℠
Market Trends, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Transportation

ACNielsen Australia
AMI Hong Kong
CARAVAN®
Central Research Services, Inc. (CRS)
Global Market Research
Harris Interactive℠
INTAGE Inc.
Kadence Business Research
Market Facts, Inc.
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
WestGroup Research

Travel/Tourism

ACNielsen Australia
AMI Hong Kong
Baltic Data House
CARAVAN®
Central Research Services, Inc. (CRS)
Decima Research, Inc.
Digital Research, Inc.
forsa GmbH
Global Market Research
Harris Interactive℠
Hendal Research
INTAGE Inc.
Inter@ctive Market Research srl
Kadence Business Research
Market Facts, Inc.
Market Trends, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RJC Marketing Research Inc.
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Trucking

CARAVAN®
Harris Interactive℠
Kadence Business Research
Marketing Resource Group, Inc.
RoperASW Fast Answers
Taylor Nelson Sofres Intersearch

Utilities/Energy

AMI Hong Kong
CARAVAN®
Central Research Services, Inc. (CRS)
forsa GmbH
Harris Interactive℠
Market Trends, Inc.
Marketing Resource Group, Inc.
MERCURY Research
NFO CFgroup
NIPO, The Market Research Institute
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch
WestGroup Research

Veterinary Medicine

I.E.S. Information Europe Services

Videos

AMI Hong Kong
CARAVAN®
Central Research Services, Inc. (CRS)
CENTRIS℠
Decima Research, Inc.
Harris Interactive℠
INTAGE Inc.
Market Facts, Inc.
Market Trends, Inc.
NFO CFgroup
NIPO, The Market Research Institute
NOEMA Ltd. Social and Marketing Research
Opinion Search, Inc.
PORI - Public Opinion & Mktg. Rsch. of Israel
RoperASW Fast Answers
Strategy Research Corporation
Taylor Nelson Sofres Intersearch

Index of Advertisers

ACNielsen Burke Institute 61
Ph. 800-543-8635 • www.BurkeInstitute.com

ActiveGroup, Inc. 41, 42, 43
Ph. 770-449-6767 • www.activegroup.net

Advantage Research, Inc. 79
Ph. 877-477-7001 • www.ariadvantage.com

Affordable Samples, Inc. 46
Ph. 800-784-8016 • ASISAMPLING@compuserve.com

Anderson, Niebuhr & Associates, Inc. 91
Ph. 651-486-8712 • www.ana-inc.com

Athena Market Research 45
Ph. 310-439-2067 • www.athenamarketresearch.com

The Axxiom Group 58
Ph. 717-229-0701 • axxiomnet@aol.com

C&R Research Services, Inc. 3
Ph. 312-828-9200 • www.cr-research.com

CENTRIS 101
Ph. 877-723-6874 • www.centris.com

Chesapeake Surveys 89
Ph. 410-356-3566 • chessurv@migkap.com

Computers for Marketing Corp. (CfMC) 66
Ph. 415-777-0470 • www.cfmc.com

Consumer Opinion Services, Inc. 84
Ph. 206-241-6050 • www.cosvc.com

Consumer Research Ascts./Superooms 31
Ph. 800-800-5055 • www.superooms.com

Conversion Model 73
Ph. [27] 216-579-500 • www.conversionmodel.com

Decision Analyst, Inc. 49
Ph. 817-640-6166 • www.decisionanalyst.com

Delve 13
Ph. 800-325-3338 • www.delve.com

Doyle Research Associates, Inc. 36
Ph. 312-944-4848 • www.doyleresearch.com

Encuesta, Inc. 60
Ph. 800-500-1492 • www.encuesta.com

Erlich Transcultural Consultants 15
Ph. 818-226-1333 • www.etcethnic.com

Fieldwork, Inc. 35
Ph. 773-282-2911 • www.fieldwork.com

Focus Groups Of Cleveland Survey Ctr. 77
Ph. 800-950-9010 • www.focusgroupsofcleveland.com

The Focus Network 5
Ph. 800-394-1348 • www.thefocusnetwork.com

FocusVision Network, Inc. 6-7
Ph. 203-961-1715 • www.focusvision.com

FocusVision VideoMarker, Inc. 9, 28, 29
Ph. 203-961-1715 • www.focusvision.com

Franklin Communications 27
Ph. 973-601-0111 • www.fc4research.com

Global Market Insite (GMI) 11
Ph. 425-369-0197 • www.gmi-mr.com

Group Dynamics in Focus, Inc. 51
Ph. 610-668-8535 • www.groupdynamics.com

GroupNet 87
Ph. 800-288-8226 • www.group-net.com

Harris Interactive ....Insert
Ph. 716-272-8400 • www.harrisinteractive.com

I Think, Inc. 85
Ph. 214-855-3777 • www.ithinkinc.com

I/H/R Research Group 88
Ph. 702-734-0757 • IHRRRA2@aol.com

ICR/International Communications Research ..105
Ph. 610-565-9280 • www.icrsurvey.com

Innovative Concepts Marketing Research 47
Ph. 516-479-2200 • www.ic-mr.com

JRA, Marketing Research 75
Ph. 215-822-6220 • www.reckner.com

Kalorama Information 57
Ph. 800-298-5699 • www.marketresearch.com

The Looking Glass 32
Ph. 800-343-5834 • www.TLGonline.com

M/A/R/C® Research 17
Ph. 800-884-6272 • www.marcresearch.com

Maritz Research 21
Ph. 800-446-1690 • www.maritzresearch.com

Market Decisions Corp. 74
Ph. 503-245-4479 • www.mdcresearch.com

MarketResearch.com 81
Ph. 800-298-5699 • www.marketresearch.com

Mature Marketing & Research 107
Ph. 617-720-4158 • www.maturemarketing.com

MORPACE International, Inc. 50
Ph. 800-878-7223 • www.morpace.com

MSInteractive 86
Ph. 800-769-0906 • www.perceptionanalyzer.com

NameQuest, Inc. 72
Ph. 480-488-9660 • www.namequest.com

On-Line Communications, Inc. 67
Ph. 918-338-2000 • www.on-linecom.com

Opinion Search, Inc. ....Back Cover
Ph. 800-363-4229 • www.opinionsearch.com

ORC International 103
Ph. 800-999-0213 • www.orcinternational.com

Pine Company 71
Ph. 800-969-7463 • www.pinedata.com

Polk Research Sampling ....Inside Back Cover
Ph. 888-225-1434 • www.polk.com

Precision Research, Inc. 38, 90
Ph. 847-390-8666 • www.preres.com

Q Research Solutions, Inc. 39
Ph. 732-952-0000 • www.whoisq.com

QRCA, Inc. 37
Ph. 203-454-1225 • www.qrca.org

RoperASW 109
Ph. 212-627-9700 • www.surveys.com

Sage Publications 70
Ph. 800-818-7243 • www.sagepub.com

Sawtooth Software, Inc. 72
Ph. 360-681-2300 • www.sawtoothsoftware.com

Schlesinger Associates ....Inside Front Cover
Ph. 732-906-1122 • www.schlesingerassociates.com

Scientific Telephone Samples 63
Ph. 800-944-4787 • www.stssamples.com

Sorensen Associates 53
Ph. 800-542-4321 • www.sorensen-associates.com

SPSS, Inc. 65
Ph. 800-525-2707 • www.spssbi.com/A9320

Survey Sampling 19
Ph. 203-255-4200 • www.surveysampling.com

Survey Service, Inc. 83
Ph. 800-507-7969 • www.surveyservice.com

Taylor Nelson Sofres Intersearch 110
Ph. 215-442-9000 • www.tnsofres.com

Taylor Research 33
Ph. 800-922-1545 • www.taylorresearch.com

Telepoll Canada, Inc. 59
Ph. 800-743-6443 • www.telepoll.net

Test Track Research, Inc. 55
Ph. 973-360-1660 • testtrack@compuserve.com

Thompson Lightstone & Co. 111
Ph. 887-823-8555 • www.omnitel.org

Tragon 44
Ph. 650-365-1833 • www.tragon.com

Venture Data 69
Ph. 800-486-7955 • www.VentureData.com

Classified Ads

Sales Offices

Headquarters: Evan Tweed, Quirk's Marketing Research Review, 8030 Cedar Avenue South, Suite 229, Minneapolis, MN 55425. Phone 952-854-5101. Fax 952-854-8191. E-Mail: evan@quirks.com.

West Coast: Lane Weiss, Lane Weiss & Associates, 10 Black Log Road, Kentfield, CA, 94904. Phone 415-461-1404. Fax 415-461-9555. E-Mail: lane@quirks.com.

Supplier Side

continued from p. 122

like Web interviewing draw development resources away from old modes like CATI.

These days, if you don't have bench strength in IT hardware and network systems, very solid knowledge of a strong CATI package that has good future prospects, and the ability to integrate different systems (including telephony), you're going to find it hard to keep up in the phone center business.

Some companies have these skills in-house because of other company needs such as client database management, Web interviewing, or software product development. Some meet them by hiring experienced research technology professionals, while others pick up bright talent from local schools. I recently met one research company owner who actually went out and acquired a small IT consulting business so that he would have access to the people he needs without having to integrate them into his research business! However you face this need, though, it has to be faced.

Large CATI subcontractors will have the volume base to support a strong staff and the required regular upgrades of hardware and software. Some full-service companies do as well, while others may fall behind due to underinvestment.

If you have the resources and commitment to interviewing technology, owning your own interviewing facility has two advantages:

• Programming your own questionnaires will give you better control over the resulting data and can shorten turnaround time. Programmers working interactively with project directors to finalize and test the questionnaire can assure higher quality in a shorter time than when the same questionnaire is passed back and forth between two organizations (or worse, tested only by a programmer who does not understand the research objectives). The more complex your questionnaires, the more true this will be.

• You can split the project more easily between multiple facilities if you developed and control the questionnaire and sample. When one subcontractor has that control and you want to bring in a second subcontractor to speed the project up, you may find the process more difficult.

What should I do?

While every company's situation is different, here are some guidelines from my experience and observations.

1) If you have to own your own facility because of client requirements or the specialized nature of your work, then commit the necessary resources to meet your quality and schedule needs.

2) If you don't have to, assess your inclinations and resources. If you are ready to take on the management commitment of a call center and have the right operations and technology management expertise at many levels in your business, you've passed the first test. If you can set up and oversee the call center in a suitable location — where effective interviewers are available at reasonable cost — you've passed the second.

3) If you have enough work to keep at least a medium-sized (let's say 50-station) facility reasonably busy 75 percent of the time or more, you've passed the final test.

4) If you've passed these tests, be sure you adopt or switch to a CATI package that's widely used by American or Canadian subcontractors, so that you have a good-sized pool of potential subcontractors to chose from when your workload peaks. Build or retain a center that's no bigger than you can keep fully utilized much or all of the time. Develop strong relationships with one or two data collection subcontractors to whom you send large amounts of regular work. Become a valued customer to get the best service. With a broader base of business than most full-service firms, they will be able to handle the peaks and valleys better. If you have a typical amount of workload variation, plan on sending 30-50 percent of your work out. This will give you volume flexibility, let you avoid carrying idle capacity costs, and raise the efficiency and quality of the work you do keep in-house.

5) If you have a lot of regular work but are in a high-cost or poor-quality location, consider a joint venture with one of the multi-location phone interviewing companies. You may be able to obtain lower cost and more control than if you did the work yourself or subcontracted it out.

A phone center location may be good for only five to seven years. If you build close to growing metro area, your window of opportunity may be even shorter than that. Demographics and local labor markets change over time, and require that you look a few years ahead when considering current or future locations. Once labor costs drive you out of a competitive total cost range, there is little you can do to reduce cost in a location without compromising quality.

6) If you decide to open an additional center, consider a location within two hours of an existing center so that you can share management and technical expertise. While two such facilities will draw from separate labor local pools for interviewers and supervisors, their proximity makes it easier to relocate full-time staff or cover open positions on a temporary basis.

7) Avoid small phone centers. Unless you have a very even workload (that will give you continuous 80 percent+ utilization) or very special quality requirements, a phone center of 30 stations or smaller won't be economical. The technology and supervisory fixed costs of any interviewing operation make it very hard to be competitive with a small facility these days.

Tough work

Running a profitable, high-quality telephone interviewing facility is tough work for the most experienced operations professionals. Many research companies with a consultative, value-added orientation do not have the management resources or work flow to run an effective facility on their own. On the other hand, if your workload, needs, and resources support it, your own facilities can be the best bet by far. Careful and honest assessment of all the factors will help you decide.

Supplier Side

Telephone data collection part 2: outsource or do it yourself?

By Michael Mitrano

Editor's note: Michael Mitrano is a principal at Transition Strategies Corporation, a management consulting firm serving the research industry. He can be reached at mmitrano@transitionstrategies.com. The author would like to thank Todd Myers of Opinion Research Corporation for his helpful review of this article.

In last month's column, I outlined four factors that a full-service company should consider in deciding whether to add a telephone interviewing capability, increase or decrease existing capacity, or exit that business all together. Those factors are cost, quality, schedule control, and technology. I addressed cost and quality last month. This column looks at schedule control and technology.

Scheduling control

One of the strongest arguments for keeping some or all interviewing in-house is that you have better control over priorities and scheduling. If you have constantly changing schedules and last-minute projects, this becomes an important issue. If you run a phone center, you can swing large percentages of your interviewing force from one project to another in mid-shift if need be. Effective subcontractors will try to accommodate shifting priorities as much as possible, but they can't fairly push aside other clients' work to favor yours. They may also grow impatient with last-minute schedule changes more quickly than in-house managers, who can put practices in place to retain flexibility if your work constantly calls for it.

Give special thought to unusually difficult studies. When production is far below budget but the study has to get done, you can martial your own workforce by putting the best interviewers on the project, giving it extra leadership on the call center floor, and using teams, prizes, and incentives to boost morale. When a subcontractor has that same study, they are probably losing money on it (since you will have negotiated a fixed price per interview) and it is causing projects for their other clients to fall behind. While a loyal subcontractor will do its best to help, the subcontractor may have a financial incentive to put as few hours on your job as they can get away with to contain their losses and keep other studies from being dragged down by yours. The bigger a customer you are of that subcontractor, the more leverage you have to keep this from happening.

Ownership works in your favor for controlling schedules only if you have a ready workforce to control! If you are in a town or neighborhood with a poor labor market for phone work, you may be chronically short of people. If your workload varies too widely and too frequently, you may not have enough experienced, productive people available when volume surges following a valley.

Technology

Long gone are the days when a tough-as-nails supervisor with a clipboard was enough to make an effective phone center. Information technology has transformed survey research phone interviewing. Sample management and call scheduling, dialing, question presentation, response capture, completed case management, client reporting, productivity and quality measurement, and payroll are all now controlled by computer systems in most phone centers. One facility may have systems from many software suppliers to accomplish all these functions, and often those systems are poorly integrated. The research software industry is changing itself, as suppliers consolidate and new modes

continued on p. 121